

Road to Excellence

Research and Resources to Build Capacity in Nonprofit Organizations



80 Bradford Street, Suite 508, Barrie, Ontario L4N 6S7

TEL 705-733-2312 | **FAX** 705-733-6197

EMAIL clo@bellnet.ca | **WEBSITE** www.communityliteracyofontario.ca

TWITTER @Love4Literacy | **FACEBOOK** www.facebook.com/CommunityLiteracyOntario

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ROAD TO EXCELLENCE

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Project Host:	Community Literacy of Ontario www.communityliteracyofontario.ca/
Research and Writing:	Joanne Kaattari
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Introduction

In our report, *“Road to Excellence: Research & Resources to Build Capacity in Non-Profit Organizations”*, [Community Literacy of Ontario](#) (CLO) has collected and analyzed key research from provincial and national organizations to support community literacy agencies in Ontario to build their organizational capacity.

For *“Road to Excellence”*, CLO researched promising practices in over 25 non-profit organizations in Ontario and Canada. Based on this research, we are pleased to share best practices, innovative ideas and practical tools and resources related to capacity building in the non-profit sector.

We cover the following topics in our *“Road to Excellence”* report:

- Board Governance
- Volunteer Management
- Human Resource Management
- Financial Management

We hope that *“Road to Excellence”* will help you in the important work that you do!



Board Governance

The Board of Directors is a key component of any non-profit organization. The Board provides critical oversight, support, guidance and access to resources and community connections. However, developing an effective, high-functioning Board of Directors is often a delicate balancing act. Let's learn from the research and tools produced by some of our colleagues in our province and country about how to improve our Board governance practices.



Imagine Canada

We are super-fans of [Imagine Canada](#) and the excellent work they do to support non-profit organizations and charities in Canada. Imagine Canada describes itself as a *national charitable organization whose cause is Canada's charities*.

Imagine Canada's Standards Program

A great initiative created by Imagine Canada is its [Standards Program](#). The Standards Program is designed to help non-profit organizations in Canada build and showcase their organizational capacity.

The program awards national accreditation to non-profits that can demonstrate strength in five key areas of organizational capacity. Even organizations that do not wish to complete the full accreditation process, can still follow along with the Standards Program in order to bolster organizational excellence.

The Standards are categorized into three levels, depending upon the size of your organization. There is a fee (based on a sliding scale) to go through the complete process of accreditation. However, organizations who do not wish to receive formal accreditation can use the resources and tools for free.

Imagine Canada's Board Governance Standard

One component of the Standards Program is [Board Governance](#). In this Standard, Imagine Canada highlights 24 Standards for Board Governance. It further explains why each Standard is important, what the benefits of implementation are, and ways to develop each Standard. Imagine Canada also shares resources to help you to implement each Standard.

Imagine Canada's 24 [Standards for Board Governance](#) are:

- Mission statement
- Strategic plan
- Recruitment & orientation of most senior staff person
- Management of most senior staff person
- Compensation and expenses of most senior staff person
- Succession planning - most senior staff person
- Risk management
- Insurance
- Legal compliance
- Communication & consultation with stakeholders
- Code of ethics/conduct
- Conflict of interest policy
- Privacy policy
- Complaints policy
- Whistleblower policy
- Number of meetings
- Board terms of reference
- Board composition
- Board compensation
- Board orientation
- Board records
- Board succession
- Board development
- Performance of the board

You can visit some or all of the Governance Standards and view the research, tools and resources to improve Board Governance practice in desired areas.

Imagine Canada's "Sector Source" Information on Board Governance

Imagine Canada has also created a helpful web-based resource called "Sector Source" which contains a variety of topics related to managing a non-profit organization. One such topic area is Board Governance.

Board Governance resources found under "Sector Source" are divided into three categories:

Building Your Board

- This topic area provides helpful online support and resources on board recruitment, evaluation, succession planning and orientation.

Board Roles and Requirements

- This category shares information and tools about governing documents for the Board (including bylaws and constitution), roles and responsibilities, meetings and committees, and issues surrounding board liability.

Board Policies and Planning

- Support and resources on strategic planning, mission statement development and policy development can be found under this topic area.

Click [here](#) to access the "Sector Source" resources on Board Governance.

The Muttart Foundation

The [Muttart Foundation](#) is a strong supporter of non-profit and charitable organizations in Canada. The foundation is based in Alberta and believes in fostering a healthy charitable sector.

The foundation has created a series of online, downloadable workbooks related to Board Governance:

- Board Building: Recruiting and Developing Effective Boards
- Developing Job Descriptions for Board Members
- Drafting and Revising Bylaws
- Financial Responsibilities of Non-Profit Boards

Click [here](#) to access these helpful workbooks.

Capacity Canada

[Capacity Canada](#) is a national charity that seeks to link non-profit organizations, share knowledge, build capacity and develop leadership skills. Capacity Canada has a variety of helpful resources on its website related to Board Governance.

- Capacity Canada has a section of its website devoted to “[Board Governance Resources](#)”, that includes topics such as:
 - Charitable Compliance
 - Good Governance Best Practices
 - Minute Taking
 - Board Policies
 - Committees
- “[Good Governance: The Essential Checklist](#)” is a short and handy checklist to help you assess whether key board functions are being effectively fulfilled, such as communication, roles and responsibilities, monitoring, committee meetings and accountability.

The Ontario Council of Agencies Serving Immigrants

The Ontario Council of Agencies Serving Immigrants (OCASI) has created the [OrgWise](#) website to help its members build organizational capacity.

On the OrgWise website, you will find some practical (and free) webinars related to Board Governance:

- Webinar #1: Legal Duties of Boards
- Webinar #2: Roles and Responsibilities of the Board
- Webinar #3: The Relationship between the Board and Executive Director
- Webinar #4: Recruitment of Board Members
- Webinar #5: Board Orientation
- Webinar #6: A Look at the Code of Conduct, Ethics and the Evaluation of the Board

To access these Board Governance webinars, click [here](#).

Maytree Foundation

[Maytree](#) is a Canadian foundation that seeks to address poverty, share information and learning resources and build capacity in the non-profit sector. Maytree has created a unique online learning opportunity called “[Five Good Ideas](#)”.

In each “Five Good Ideas” session, an expert shares five practical ideas to create stronger and more resilient non-profit organizations. The original sessions are held face-to-face in a lunch-and-learn format. As well, these sessions are also available online videos. Maytree continually adds new topics, and archives older one, so it is wise to revisit their site.

We highly recommend watching Maytree’s “[Strong Governance for Strong Organizations](#)”. In this excellent online learning video, the following five good ideas related to Board Governance are presented:

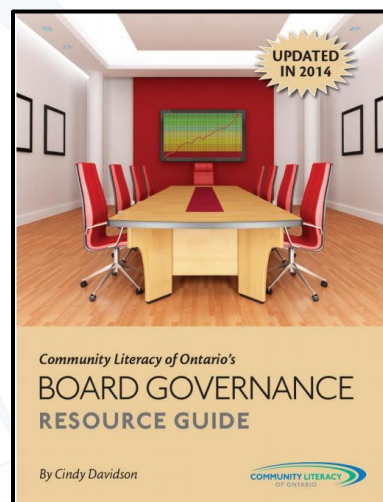
- Embrace increased transparency
- Be aware of the need for increased accountability
- Pay close attention to conflicts of interest
- Determine the skill sets you need
- Develop a committed and engaged Board

Community Literacy of Ontario

While our “Road to Excellence” report is designed to share research and resources from the broader non-profit sector, Community Literacy of Ontario’s online “[Board Governance Resource Guide](#)” is so valued by many community-based literacy agencies that we just had to include it too!

These are the topics covered in CLO’s awesome Board Governance Resource Guide:

- Board Roles and Responsibilities
- Governance Structures
- The Board and Risk Management
- Board Development
- Effective Board Meetings
- Board Evaluation



Volunteer Management

Volunteers are an important part of non-profit organizations. Volunteers provide critical support whether they serve as Board members, work with clients, provide administrative support, help with fundraising events, or other important tasks. In order to offer a positive experience for volunteers and clients, non-profit organizations need to effectively manage their volunteers. Luckily, we can learn a great deal about effective volunteer management practices from the research and resources created by other organizations in our province and country.



Imagine Canada

Imagine Canada's Volunteer Involvement Standard

Once again, we can look to [Imagine Canada's](#) Standards Program, which includes a Standard for [Volunteer Involvement](#). For the Volunteer Involvement Standard, Imagine Canada has developed 9 Standards. Imagine Canada explains why each Standard is important and what benefits they would provide to your organization. They also share tools to help you with implementation. The Volunteer Involvement Standards can be used, in whole or in part, to strengthen your volunteer management practices.

Imagine Canada's nine Standards for Volunteer Involvement are:

1. Volunteer policies and procedures
2. Volunteer oversight
3. Volunteer assignments
4. Volunteer recruitment
5. Volunteer screening
6. Volunteer orientation and training
7. Volunteer engagement and supervision
8. Volunteer recognition
9. Volunteer evaluation

Imagine Canada's "Sector Source" Information on Volunteer Involvement

Imagine Canada "Sector Source" hosts diverse resources related to volunteer management. Volunteer management resources found under "Sector Source" are divided into two categories:

Volunteer Recruitment

- This topic area shares resources on volunteer recruitment and screening.

Volunteer Management

- In this section, you can find online resources on volunteer rights and responsibilities, training, and management.

Click [here](#) to access the "Sector Source" resources on volunteer management.

Maytree Foundation

The [Maytree Foundation](#) has some excellent resources related to volunteer management in its "[Five Good Ideas](#)" series.

The Maytree Foundation's "[Five Good Ideas about engaging today's volunteers](#)" online video presents the following helpful solutions:

- Create a variety of roles with volunteer job descriptions that highlight impact
- Invest significant time to understanding what motivates each of your volunteers and match them to the right role
- Respect the volunteer's time and expertise
- Provide opportunities for learning, skill development, mentoring and networking
- Recognize volunteers frequently and in meaningful ways



Volunteer Canada

[Volunteer Canada](#) is the national voice for volunteerism in Canada. Volunteer Canada creates various programs and resources to increase and support volunteerism and civic participation across our country. Volunteer Canada has an impressive array of resources on their website covering all aspects of volunteer management, from recruiting, to screening, to supporting, and recognizing volunteers.

Canadian Code for Volunteer Involvement

Volunteer Canada created the [Canadian Code for Volunteer Involvement](#) in order to help non-profit organizations strengthen their volunteer engagement strategies and their organizational capacity.

The Code has 14 standards for managing volunteers in non-profit organizations. Be sure to visit Volunteer Canada's [Code for Volunteer Involvement](#) to access resources and checklists to help you meet those standards and strengthen your volunteer management practices.

Here are Volunteer Canada's 14 volunteer management standards:

1. Mission-based Approach

The organization's Board of Directors and senior staff acknowledge and support the vital role of volunteers in achieving the organization's purpose or mission. Volunteer roles are clearly linked to the organization's mission.

2. Human Resources

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. The organization has a planned approach for volunteer involvement that includes providing appropriate resources to support volunteer involvement.

3. Policies and Procedures

A policy framework that defines and supports the involvement of volunteers is adopted by the organization.

4. Volunteer Administration

The organization has a clearly designated individual(s) with appropriate qualifications responsible for supporting volunteer involvement.

5. Risk Management and Quality Assurance

Risk management procedures are in place to assess, manage, or mitigate potential risks to the volunteers, the organization and its clients, members and participants that may result from the delivery of a volunteer-led program or service. Each volunteer role is assessed for level of risk as part of the screening process.

6. Volunteer Roles

Volunteer roles contribute to the mission or purpose of the organization and clearly identify the abilities needed. Volunteers are involved in meaningful ways.

7. Recruitment

Volunteer recruitment incorporates a broad range of internal and external strategies to reach out to diverse sources of volunteers.

8. Screening

A clearly communicated and transparent screening process, which is aligned with the risk management approach, is adopted and consistently applied across the organization.

9. Orientation and Training

Volunteers receive an orientation to the organization, its policies, and practices, appropriate to each role. Each volunteer receives training specific to their role and needs.

10. Support and Supervision

Volunteers receive the level of support and supervision required for the role and are provided with regular opportunities to give and receive feedback.

11. Records Management

Standardized documentation and records management practices and procedures are followed and are in line with current relevant legislation.

12. Technology

Volunteers are engaged and supported within the organization through the integration and intentional use of technology.

13. Recognition

The contributions of volunteers are acknowledged by the organization with ongoing formal and informal methods of recognition, applicable to the volunteer role.

14. Evaluation

An evaluation framework is in place to assess the performance of volunteers and gauge volunteer satisfaction. The effectiveness of the volunteer engagement strategy in meeting the organization's mandate is also evaluated.

Volunteer Screening

Volunteer Canada has excellent resources available on the “[Volunteer Screening](#)” section of their website. They overview the benefits of screening, discuss why it is important, share resources and more.

Volunteer Canada also shares the “[10 Steps of Screening](#)” which gives practical guidelines for developing safe and effective screening policies and procedures.

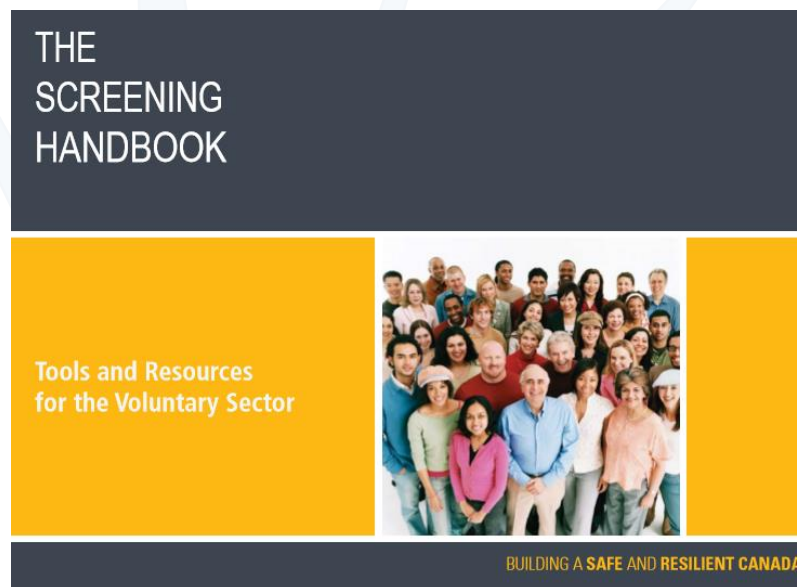
Volunteer Canada’s ten steps to volunteer screening are:

1. **Assessment** (assess the risks for every volunteer position)
2. **Position – Assignment** (write accurate position descriptions)
3. **Recruitment** (develop fair and consistent selection processes)
4. **Application Forms** (create standard forms and processes to gain information from applicants)
5. **Interview** (develop consistent interview format)
6. **References** (check references)
7. **Police Checks** (assess risks for each position and determine whether a police check is necessary)
8. **Orientation and Training** (provide information about your organization and the volunteer position)
9. **Support and Supervision** (provide needed support and supervision to each volunteer)
10. **Follow-up and Feedback** (seek feedback from clients, staff and other stakeholders)

Road to Excellence

The Volunteer Screening Handbook

Volunteer Canada also created “[The Screening Handbook](#)”. This helpful handbook overviews all of the steps to volunteer screening and shares tools to help organizations to more effectively recruit, assess, match and support volunteers.



Research about Volunteering in Canada

Volunteer Canada also shares and analyzes the data from Statistics Canada’s 2013 survey on “[Giving, Volunteering and Participating in Canada](#)”.

Here are some of the highlights from the survey:

- 44% (or 12.7 million) Canadians volunteered in 2013
- Close to 2 billion hours were volunteered by Canadians in 2013
- The number one reason Canadians volunteer is to contribute to their community
- The main reason that Canadians do not volunteer is due to a lack of time

Volunteer Canada also shares information on the volunteer landscape in Canada, including demographics, activities, level of involvement, and reasons why Canadians volunteer. Click [here](#) to access this research. They have also created an [infographic](#) on the state of volunteering in our country.

Human Resource Management

Given the critical importance of well-trained, skilled and motivated staff to any non-profit organization, effective human resource management is a vital function. In small non-profit organizations, staff are often busy and overwhelmed. Accessing promising practices about human resource practices from other non-profit organizations can help with this important function.



Imagine Canada

Imagine Canada's Staff Management Standard

[Imagine Canada's](#) helpful [Staff Management Standard](#) is a key resource for all areas of HR management.

There are 13 Staff Management Standards and Imagine Canada shares the benefits of each Standard, along with tools for implementation. You can use some or all of the Standards to enhance HR practices in your organization.

Imagine Canada's 13 Standards for Staff Management are:

1. HR policies
2. Accessibility of HR policies
3. Review of HR policies
4. Compensation practices
5. Job descriptions
6. Recruitment and selection process
7. Offers of employment
8. Orientation and training of new employees
9. Performance objectives
10. Performance evaluation
11. Employee development
12. Succession planning
13. Workplace conflict

Imagine Canada's Sector Source

Imagine Canada's [Sector Source on Staff Management](#) is full of helpful online resources. It is divided into three sections:

1. [HR Policies and Practices](#)

This section includes tools and resources on:

- General HR Management
- Recruitment
- Dismissal
- Succession
- Diversity

2. [Compensation and Benefits](#)

In this section, you'll find resources on the following topic areas:

- Compensation
- Benefits
- Leadership
- Professional Development
- Contracts
- Leaves and Retirement

3. [Legislation and Liability](#)

This section has resources and templates on:

- Employment Practices Legislation
- Human Rights
- Health and Safety
- Privacy
- Harassment
- Accessibility
- Inclusivity

HR Council

The [HR Council](#) seeks to build knowledge and capacity to strengthen HR management practices in the non-profit sector in Canada. Their website is an absolute treasure trove of information, tools and resources on HR issues.

HR Toolkit

One of our favourite resources is the Council's [HR Toolkit](#). This helpful Toolkit covers everything a small non-profit would want to know about HR issues and shares practical tools, templates, samples and more.

The HR Toolkit covers the following topics:

- HR Planning
- Policies and Legislation
- Recruitment
- Keeping the Right People
- Compensation and Benefits
- Diversity at Work
- Employee Development

Since community-based literacy agencies are often looking for sample policies and procedures, of particular note is the section of the Toolkit called "[Sample Policies on Common HR Topics](#)".

HR Management Standards

The HR Council also created the following six [HR Standards](#):

1. Policy Framework and Employment Legislation
2. Getting the Right People
3. Managing People and their Work
4. Workplaces that Work
5. Learning, Training and Development
6. HR Planning

Each of these Standards link to resources to help you understand why each Standard is important and also lets you access resources and templates to help with implementation. As a part of the Standards, you can even conduct a "[Self-Assessment](#)" to help you find out where your organization might need to tune-up its HR practices.

Maytree Foundation

You can look to the [Maytree Foundation's "Five Good Ideas"](#) series for helpful information on a variety of HR issues.

For example, the Foundation's "[Five Good Ideas about improving your organization's human resources on a budget](#)" video covers the following important topics to help small non-profits build a stronger staff team:

- Start with a strong foundation
- Balance implementing best practice with being unique
- Expand your organizational capacity through others
- Deal with the tough stuff
- Be in it for the long term

The Muttart Foundation

The [Muttart Foundation](#) developed a handy self-guided workbook called "[Hiring and Performance Appraisal of the Executive Director](#)" to help the Board of Director with HR issues related to the Executive Director.

Topics covered in this workbook include:

- Developing the job description
- Reviewing the mandate of the Executive Director
- Conducting the hiring process
- Welcoming and supporting the new Executive Director
- Conducting the performance appraisal

Literacy Link South Central

In our "*Road to Excellence*" report, we share research and resources from the broader non-profit sector. However, because this resource is so useful, we just had to include it here as well! [Literacy Link South Central](#) created a helpful "[Succession Planning Guide for Literacy and Basic Skills Agencies and Networks](#)".

The Guide is full of practical charts, checklists and resources to help you plan for employee turn-over and change in your literacy agency.

Financial Management

Sound financial management is key to the current and future health of any non-profit organization. In this section, we share research and resources developed by Canadian non-profit sector organizations to support financial planning and the use of solid accounting processes, practices and policies to ensure accountability and fiscal responsibility.



Imagine Canada

Imagine Canada's Financial Accountability and Transparency Standard

[Imagine Canada](#) has a Standard on [Financial Accountability and Transparency](#). This Standard covers the important areas of non-profit financial management that impact the financial viability and reputation of an organization.

Imagine Canada explains why each Standard is important to financial management and shares resources to help with implementation.

There are 13 Standards for Financial Accountability and Transparency:

1. Completion of financial statements
2. Audit/review engagement
3. Release of financial statements
4. Tax filing
5. Budget approval and oversight
6. Statutory remittances
7. Board oversight of fundraising and administrative costs
8. Investment policy
9. Online sales and donations
10. Disclosure - general
11. Disclosure - compensation
12. Disclosure - payments to board members
13. Disclosure - fundraising costs

Imagine Canada's Sector Source

Imagine Canada also hosts a variety of useful financial management resources online in its [Sector Source on Finance and Administration](#). Sector Source is divided into two sections:

1. [Financial Management](#)

This section includes information and tools on:

- Budgeting
- Record keeping
- Financial statements
- Audits

2. [Reporting and Receipting](#)

In this section, you can find online resources on:

- Reporting to the Canada Revenue Agency
- Gifts
- Receipting

sector source

Sector Source also has a section on [Charity Tax Tools](#). It contains information to help registered charities understand what they must do in order to meet Canada Revenue Agency requirements.

Charity Tax Tools covers the following topics:

- To be a charity or not?
- Charitable activities
- Gifts and receipting
- Record keeping
- Working with the Canada Revenue Agency

The Community Sector Council Newfoundland and Labrador

The [Community Sector Council Newfoundland and Labrador](#) (CSC) works to build capacity in non-profit and community organizations. The CSC has developed an extremely helpful online resource called "[Cheque It Out](#)".

"Cheque It Out" seeks to help non-profit organizations strengthen their internal financial controls. It is divided into two components: a webinar series and a compendium of checklists and resources.

Cheque It Out: Webinar Series: Internal Financial Controls for Nonprofits

In its "[Cheque It Out: Webinar Series: Internal Financial Controls for Nonprofits](#)", the CSC presents a series of informative webinars on internal financial controls in non-profit organizations. The recorded webinars are available on the CSC website, along with PDF versions of the slides and the handouts.

These topics are covered in the "Internal Financial Controls for Nonprofits" webinar series:

- A culture of controls and how to establish a paper trail
- Cash on hand and cheque signing authority
- Review a bank reconciliation
- Protecting fixed assets
- Purchases and sales
- Personnel cheques and payroll protection
- Charitable receipting and donor relationships

Checklists: A Compendium - Internal Financial Controls for Nonprofits

The CSC also created a useful compendium of checklists on internal financial controls for use by non-profits and charities. Topics covered in "[Checklists: A Compendium - Internal Financial Controls for Nonprofits](#)" include:

- The basics of internal financial controls
- Top tips for controlling cash
- Internal controls to protect assets
- Internal controls on payroll and personnel

Maytree Foundation

Once again, the [Maytree Foundation's "Five Good Ideas"](#) series shares practical resources and tools related to non-profit management.

One highly recommended resource to support financial management in your organization is Maytree's "[Five Good Ideas about creating a good budget](#)". The following topics are covered in this online learning video:

- Your budget lives in the house of the strategic plan. Build it from the ground up, tend to it line by line.
- Make sure your fundraising targets are realistic. Zero-based budgeting can be over-rated. Facing a deficit head on just might be better than relying on a fundraising plug.
- When you're approving the budget, no question is too small and no idea too big.
- Pay attention to capital purchases, they can be tricky.
- You can always change your forecast but the budget is the budget.

The Muttart Foundation

The [Muttart Foundation](#) created a self-guided workbook called "[Financial Responsibilities of Non-Profit Boards](#)" in order to help Boards of Directors better understand financial planning, development and monitoring in their non-profit organizations.

Topics covered in this highly practical and useful workbook include:

- Understanding roles and responsibilities
- Planning and tracking financial results
- Making sure the accounts are in order
- Reading a financial statement
- Reporting requirements
- Liability issues



Chartered Professional Accountants Canada

We are pleased to share two resources from [Chartered Professional Accountants Canada](#) (CPA).

These helpful documents have been written by professional accountants specifically for Canadian non-profit organizations. They are written in clear language and offer good advice and information for Board members.

1. [A Guide to Financial Statements for Not-For-Profit Organizations: Questions for Directors](#)

This Guide overviews the following topic areas:

- The roles and responsibilities associated with financial reporting
- The concepts and terminology of financial reporting
- Two key financial statements
- Items for directors to watch for and questions to ask

2. [20 Questions Directors of Not-For-Profit Organizations Should Ask About Fiduciary Duty](#)

This resource highlights 20 key questions every Board member should ask related to overseeing the finances of a non-profit organization. It is written in an easy-to-read format, and is designed to support the Board with due diligence and to increase sound financial management practices.



Charity Village

[Charity Village](#) supports the non-profit sector with HR resources, webinars, articles and other online resources.

Charity Village has a wide array of resources on their website, but we wanted to highlight one in particular called “Four Keys to Financial Success in Small to Mid-Size Nonprofits and Charities”. This resource has two components: a [webinar](#) and an [article](#).

Both the webinar and the article highlight the following four steps to financial success:

1. A clear financial strategy
2. A plan for generating income
3. A robust financial budgeting and reporting system
4. An accountable internal environment

Conclusion

The Board and staff of [Community Literacy of Ontario](#) sincerely hope that the best practices, tools and resources in “*Road to Excellence: Research & Resources to Build Capacity in Non-Profit Organizations*” will help to build your organizational capacity and support the great work that you do.

“Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has.”

QUOTE FROM MARGARET MEAD

