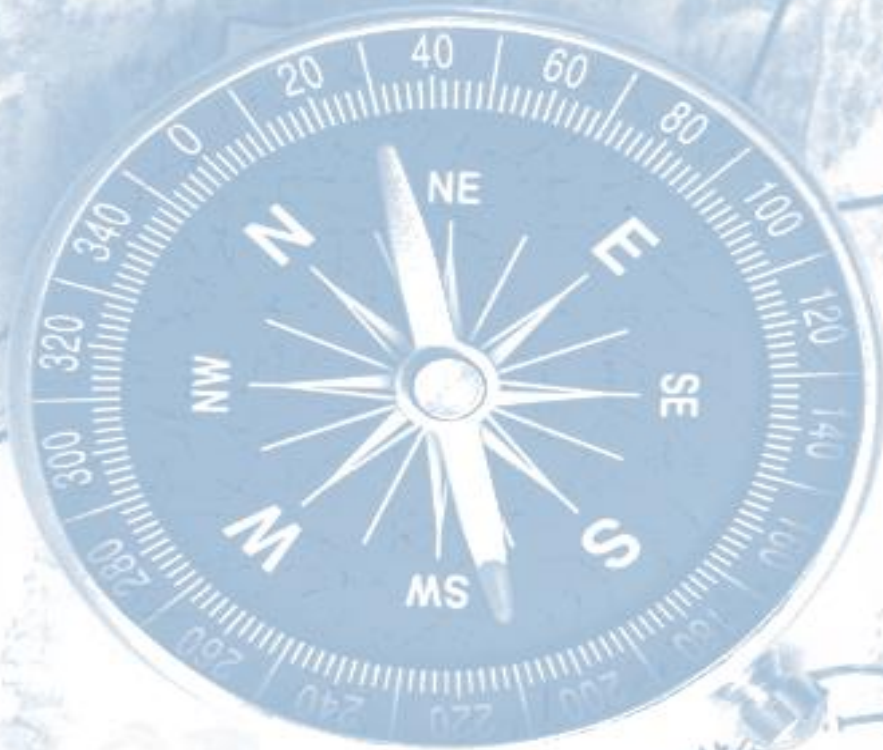


Road to Excellence



Research and Resources to Build Capacity in Nonprofit Organizations VOLUME 2



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ROAD TO EXCELLENCE – Volume 2

Research and Resources to Build Capacity in Nonprofit Organizations

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Introduction

In our report, *“Road to Excellence: Research and Resources to Build Capacity in Nonprofit Organizations- VOLUME 2”*, [Community Literacy of Ontario](#) (CLO) has collected and analyzed helpful research from provincial and national organizations in order to support literacy agencies to build their organizational capacity.

For *“Road to Excellence”*, CLO researched promising practices in numerous nonprofit 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 nonprofit sector.

We cover the following topics in our *“Road to Excellence – Volume 2”* report:

Partnership
Development

Fundraising

Social
Enterprise

Strategic
Planning

Partnership Development

Whether you refer to it as collaboration, partnership, collective impact, cooperation, a strategic alliance, or something else entirely – nonprofits know that working with others helps us achieve greater results than when we work in isolation. But how do we develop those partnerships that allow us to achieve so much more?

In this section of our Road to Excellence report, we're pleased to share insight and tools from organizations across Canada that can help you lay the groundwork for partnership success.



The Maytree Foundation

[The Maytree Foundation](#) continues to provide excellent resources for charities and nonprofits, with a particular focus on those that work to overcome social issues connected to poverty. As we in the literacy field have a deep understanding of the positive impact that adult literacy has on poverty, the Maytree Foundation remains a go-to source for research and information to support our work.

Five Good Ideas

Maytree's [Five Good Ideas](#) program offers practical ideas and solutions for partnership development in addition to a host of other topics. As with other videos and articles in the series, we are provided with an opportunity to learn from an expert speaker who presents five concise ideas and explores how they can be translated into action.



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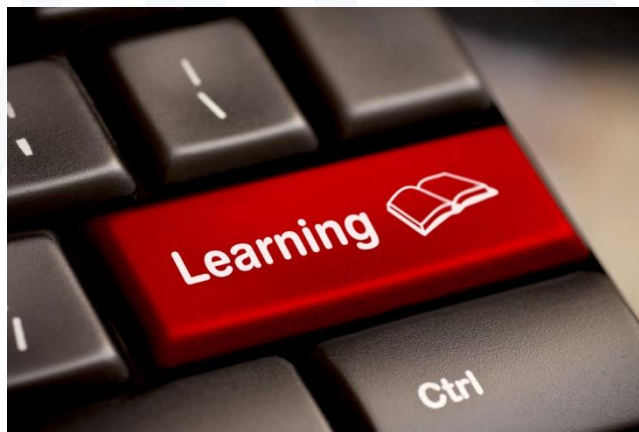
Five Good Ideas about Collaboration: Moving Forward, Together

In [this](#) Five Good Ideas session, Anne Gloger, the Principal of the Centre for Connected Communities and East Scarborough Storefront, talks about collaboration from a different perspective – the human element that underpins the success or failure of potential partnerships. Anne shares tips for creating inspiring and successful collaborations, framing them around both making choices and respecting the choices of others, having empathy, curating partnerships, celebrating small achievements, and focusing on connectedness.

Five Good Ideas about Cross-Sector Leadership

In [this](#) Five Good Ideas session, Matthew Thomas, the Co-founder and CEO of Paddle, talks about how partnerships across sectors allows for impact and change on a much larger scale than working independently. Looking at mistakes as well as successes, Matthew outlines how the old high school physics lesson of “mass x velocity = impact” can be used in the nonprofit field to create positive social and environmental impact. Tips on cross-sectoral networking, moving past your biases to understand and appreciate the motives of other sectors, and a fascinating look at language across different sectors (what do the words “equity” and “margins” mean to your possible partners?) are shared.

We encourage you to visit the Maytree Foundation’s website to review not only their Five Good Ideas initiative, but the other publications and learning tools they have to offer – they truly are a wealth of great ideas and support!



The Ontario Nonprofit Network

[The Ontario Nonprofit Network](#) (ONN) is an independent network focused on policy, advocacy, and creating positive change for Ontario's nonprofits and charities. As the network for approximately 55,000 nonprofit organizations across Ontario, ONN gathers information about and speaks on behalf of the nonprofit sector to government, funders and business to influence systemic change.

NETWORKS + ACTION: The Way We Work

The [Networks + Action](#) guide was created by the ONN to share strategies, discuss successful processes, and outline reasons for community and network collaboration. The guide is broken into sections focused on ONN's journey and story, and insights that they wish to share with nonprofits. A helpful colour-coded legend draws your attention to key areas of interest, including:

- When action-oriented networks are most useful, and how a network approach can bring about system change
- The difference between networks working in collaboration and organizations working independently
- The “basics”: minimum specifications that must be in place to successfully create change
- Tips and Tricks for network and community organizing, including:
 - Clearly articulating and identifying needs and opportunities
 - Building relationships and trust
 - Avoiding bottlenecks that slow communication
 - Developing and practicing network culture
 - And more

Learning from the insights of the Ontario Nonprofit Network, which celebrated its 10th anniversary in 2017, is a great opportunity to lay the groundwork for your own network and partnership building.

MOSAIC

[MOSAIC](#) (or the Multi-lingual Orientation Service Association for Immigrant Communities) was founded in 1976 in response to ongoing challenges faced by Vancouver's many non-English-speaking immigrants. While MOSAIC is collaborative organization serving immigrants, newcomers and refugees in the Vancouver area, their tools and resources translate well across the nonprofit sector in general.

The Partnership Toolkit

In partnership with a Collaboration Roundtable, MOSAIC prepared this 134-page document called the [Toolkit for Building and Sustaining Partnerships](#) offers guidelines and tools that can lead to the establishment of strong and mutually beneficial partnerships.

The Toolkit includes a “Primer on Partnerships” that outlines both the benefits and challenges inherent to these relationships, and describes the features of a successful partnership – both in the initiation and maintenance stages of a joint venture. A series of practical tools follows, including checklists, self-assessment tools, and questions that will help organizations make good decisions about what partnership opportunities are right for them. Some of our favourite tools in this resource include:

- A partnership rating tool that helps identify similarities and differences between your organization and its potential partners to determine if there is a good fit.
- A tool for collaborative groups to appeal successfully to a wide range of funders at different levels, including proposal development, effective communication, and funder expectations both during the proposal stage and post-approval.
- Tools for partners to develop management and decision-making models, to ensure that the needs of all partners are met and that their internal policies, workplace cultures and structures are compatible.
- Sample letters of agreement, and other helpful tools that can be used to plan, build, manage, evaluate and dissolve partnerships effectively.

MOSAIC's comprehensive toolkit offers something for any nonprofit organization looking to learn best practices in successful collaboration, or who are already working in partnership with others. Different tools will be valuable to different organizations, depending on their current needs and future goals. We definitely encourage you to review this excellent resource!

The Ontario Community Support Association

The [Ontario Community Support Association](#) (OCSA) acts as a voice for the home and community support sector. Formed in 1992 by three organizations to allow them greater impact and a more powerful voice together, OCSA membership now includes nearly 300 nonprofit organizations, for whom they offer training and resources, and assist in developing partnerships.

Capacity Builders' Collaboration Coach

[Capacity Builders](#) is a division of OCSA, and their [Collaboration Coach](#) platform is designed to share successful strategies to help nonprofit organizations avoid common pitfalls and make informed decisions about collaboration. You'll find answers to common questions, practical tools, and insightful stories for new or mature collaborations under six key themes:

1. Understanding Collaboration
 - a. Come to a Shared Understanding About Collaboration
 - b. Map the Stages in the Life of a Collaboration
2. Investing in Collaboration
 - a. Prepare your organization to get the most from collaboration
 - b. Make informed decisions about investing in the right collaboration
3. Building Effective Relationships
 - a. Find and Develop the Right Partners
 - b. Build Trust, Negotiate Power Dynamics and Communicate Effectively
4. Creating Shared Governance
 - a. Design the Right Governance
 - b. Document and Evaluate Governance Structures and Processes
5. Setting and Monitoring Direction
 - a. Establish a Shared Direction and Monitor Progress
 - b. Leave or End a Collaboration
6. Getting the Work Done
 - a. Accomplish the Work of the Collaboration

One of our favourite parts of the Collaboration Coach is the “practical tools” section in each themed area. For example, under section 3b (Build Trust, Negotiate Power Dynamics and Communicate Effectively) you'll find checklists of communication tools and their most effective uses, and a process for effective conflict resolution. Be sure to check out these resources and more through the Capacity Builders' Collaboration Coach!

The Ontario Council of Agencies Serving Immigrants

The [Ontario Council of Agencies Serving Immigrants](#) (OCASI) is a registered charity formed in 1978. Its membership is comprised of more than 220 community-based organizations serving immigrants across Ontario. OCASI works to facilitate information-sharing and capacity development across this sector. While the tools and resources offered by OCASI are geared towards community-based agencies that serve immigrants and refugees, there are many easily-transferable resources that are relevant to the broader nonprofit sector.

Webinar: Collaboration Partnerships and Mergers

In 2009, OCASI established a set of voluntary organizational standards for the Settlement sector in Ontario called [OrgWise](#), which provide a variety of professional development resources that include videos and webinars. We're pleased to draw your attention to a 90-minute, recorded [webinar](#) on the topic of collaboration, partnerships and mergers that focuses on several partnership development topics, including:

- Defining collaboration
- Outlining different types of collaboration
- The “collaboration imperative,” and motivations for collaborating
- Characteristics of successful collaboration
- Power and risk management
- Collaborative governance and leadership, and
- Collaboration within mergers

The heart of the webinar begins around the 14-minute mark, when the webinar facilitator discusses different words used to describe collaboration, and then moves into the “3 Cs” of cooperation, coordination and collaboration. In this webinar we also learn about turf wars vs. trust, the messiness of collaboration, the complexity of social issues and why collaborations are more effective at tackling them. For an excellent list of resources, be sure to check out the slides that begin at the 1 hour and 18 minute mark, where ten links to research papers, websites and other resources are shared.

Collaboration is becoming an imperative way of life in the nonprofit sector, and the information shared in this webinar can help your organization better position itself to work with other community partners to meet your shared goals.

The United Way Toronto & York Region

Nationally, the United Way works together with nonprofits, government, community agencies, corporate partners, labour and donors to build stronger and healthier communities. The [United Way of Toronto & York Region](#) is one of over 90 local United Way offices; each registered as its own nonprofit organization and governed by an independent volunteer-led local Board of Directors.

Participating Effectively as a Collaborative Partner

Developed for United Way Toronto & York Region staff as a resource to support them in partnering with the broader community, this excellent resource translates well to anyone looking to become an effective collaborator.

[Participating Effectively as a Collaborative Partner](#) includes not only fillable forms to help users evaluate their readiness to partner with others, but it also provides resources to help you to analyze organizational values, and assess partner compatibility. There are also 13 easy-to-use tools that include a theory of change worksheet, collaboration agreement templates, and process steps for conflict resolution.

Using the tools included in this resource, nonprofits can both identify and celebrate the strengths of their own organizations and their potential partners, but additionally, to build a solid foundation for successful collaborations that can benefit their clients and communities.



Fundraising

In a world of governmental changes, increasing expenses, and more complex client needs, fundraising has become an important element contributing to the effectiveness of many Canadian charities and nonprofit organizations. In addition to much-needed financial support, fundraising also can lay the ground work for raising the public's awareness of key social issues, help you to market your agency, and build long-term relationships with donors and stakeholders. Having the tools you need to effectively fundraise becomes part of a larger picture as a result, and we're pleased to share these resources and tools in support of your success.



Imagine Canada

[Imagine Canada](#) has been supporting nonprofit organizations and charities since their inception in 2005. They offer a fabulous selection of programs and resources to help build the capacity of Canadian charities to effectively support the communities they serve.

Imagine Canada's Standards Program

This nationally-recognized program offers a set of [73 standards](#) designed to strengthen nonprofit competence in five key areas:

1. Board governance
2. Financial accountability and transparency
3. Fundraising
4. Staff management
5. Volunteer involvement

The Standards Program is in place to help build organizational capacity. Nonprofits are invited to use them and their accompanying tools free-of-charge to improve and monitor their practices. Imagine Canada also offers a formal accreditation process, where through peer review, charities and nonprofits can be granted the use of the Standards Trustmark. Application, participation and fees apply based on the size of the organization.

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Imagine Canada's Fundraising Standard

Imagine Canada's [Standards Section C](#) is specific to fundraising, and outlines important rules to follow in 14 key areas:

1. Responding to donor requests
2. Exchanging or sharing of donor lists
3. Donor privacy
4. Encouraging donors to seek independent advice regarding their donation
5. The preparation and issuing Official Income Tax receipts when appropriate
6. Truthful and accurate fundraising communications
7. Misleading claims
8. Sensitive, non-exploitive portrayal of beneficiaries
9. Information to be included in fundraising material
10. Finder's fees, commissions or percentage compensation for fundraisers
11. Behaviour of fundraisers
12. Fundraising and gift acceptance policies
13. Face-to-face solicitations
14. Cause-related marketing agreements with third parties

With the guidance of these 14 fundraising standards, nonprofits and charities can ensure that their donors and clients are respected, Canadian regulations are adhered to, and their organizational reputation is protected.

Imagine Canada's Sector Source

Imagine Canada's [Sector Source](#) connects charities and nonprofits with resources to help develop organizational capacity. Whether you're looking for sample policies, reporting tips or best practices, Sector Source is truly a wealth of useful information.

Sector Source: Managing an Organization

Visit Sector Source's [Managing an Organization](#) for links to helpful resources on everything from starting an organization to staff management. The [Fundraising](#) section offers critical insight into working with corporate funders, finding and applying for grants, ethical fundraising, and planning under four key topics:

- **Grantseeking Fundamentals**, including fundraising strategies, prospect research, grants, and proposal writing
- **Fundraising Management and Policies**, including fundraiser planning, policy development, and fundraising strategies
- **Corporate Giving**, including fundraising from corporations, sample agreements and policies, sponsorships, and gifts-in-kind
- **Ethics and Risk Management**, including codes of ethics, fundraising activities and costs, research, donor records, and privacy

Drilling down into these four broad topics provides nonprofits with a wealth of information specific to many aspects of fundraising, both at the local level and through larger grants and corporate partnerships.

sector
source

Capacity Canada

[Capacity Canada](#) provides nonprofit leaders with resources and professional support to enhance their skills, stimulate cross-sector collaboration, promote knowledge sharing, and encourage social innovation.

Fundraiser's Receipt Book: Receipting Decision Tree

Capacity Canada's [Receipting Decision Tree](#) provides charities and nonprofits with a step-by-step process to determine whether a charitable gift qualifies for a receipt, whether the gift can or should be appraised to determine its value, what type of receipt should be issued, and more. This helpful document also includes a quick-reference guide explaining the terms used in the Decision Tree and sample receipts you can recreate for your organization.

For smaller nonprofits new to their fundraising journey, it can be a challenge to keep track of all the applicable rules and regulations. Capacity Canada's Decision Tree can help you follow the rules set out in the Income Tax Act and the Charities Directorate of the Canada Revenue Agency.



The Association of Fundraising Professionals

The [Association of Fundraising Professionals](#) (AFP) supports fundraising through advocacy, research, and professional development and certification programs. They have more than 30,000 members in over 230 chapters around the world, including Canada.

Donor and eDonor Bill of Rights

The AFP's [Donor Bill of Rights](#) outlines both the responsibilities a charity has to its donors, and the expectations that donors should have when making a charitable gift. This Bill of Rights provides an excellent outline of ten best practices that all nonprofits should follow when soliciting funds, and has recently been expanded to include an [eDonor Bill of Rights](#).

The eDonor Bill of Rights includes nine specific rights, responsibilities and best practices for online fundraising. Each Bill of Rights outlines the importance of clearly identifying:

- Your organization's mission, purpose and charitable status
- Contact information
- The availability of charitable receipts when applicable
- Privacy policies
- Acknowledgement and recognition of giving
- How funds will be used
- And more

With these guiding principles in place, nonprofits can ensure that they uphold the rights and responsibilities of both their organization and those who respond to their fundraising efforts, both in person and online.



The Maytree Foundation

[The Maytree Foundation](#) was established in 1982, with a focus on strengthening civic communities and promoting systemic solutions to poverty. Some of Maytree's earliest work involved researching adult literacy and its correlation to poverty. Maytree's other areas of strength and leadership include immigration, diversity, education, and the connection between human rights and the systems that can either produce or combat poverty.

Five Good Ideas

[Five Good Ideas](#) is Maytree's lunch-and-learn program, where experts and participants discuss practical ideas and solutions for key issues facing today's nonprofits. In each session, the speaker presents five succinct ideas and works with participants to explore how they can be translated into action. A link to a video recording of the sessions, which are 30 to 40 minutes in length, is included in the follow-up article that summarizes their five good ideas, and offers accompanying resources.

Five Good Ideas about Effective Fundraising in the Digital Age

In [this](#) Five Good Ideas session, Shannon Craig, the Chief Marketing and Product Officer of CanadaHelps, speaks about the increasing importance of our online world, and how it has changed the way people interact with organizations, including nonprofits. She explains what she calls the "core digital building blocks" to focus on now, and prepares us for what we need to consider five years from now. Does your website's home page speak effectively to potential donors? Shannon will help you find out, using real examples with strong calls to action, and offering practical advice and "quick wins" you can establish easily.

Five Good Ideas about Major Gift Fundraising

In [this](#) Five Good Ideas session, Franca Gucciardi, the CEO of the Loran Scholars Foundation, shares strategies for how small and medium sized nonprofits can shift their focus from fundraising through events and grants, to targeting major gift donations instead. Franca's innovative ideas are based on establishing relationships and connections, developing prospects, conducting research, and finding ways to make it easy for people to say "yes".

Maytree's commitment to developing and sharing knowledge, strengthening leaders, and furthering economic and social rights have positioned them as a wonderful go-to for nonprofit professionals. We encourage you to review the wide variety of resources they have to offer, in order to strengthen your organization's capacity.

Volunteer Alberta

Since its foundation in 1990, [Volunteer Alberta](#) has worked to promote, celebrate, and enable volunteerism in the nonprofit sector. As a member association serving Alberta's diverse nonprofit organizations, Volunteer Alberta's mission is to empower nonprofits to succeed through knowledge exchange and strategic connection.

Building Corporate Relationships – A Toolkit for Nonprofits

Volunteer Alberta's [Building Corporate Relationships - A Toolkit for Nonprofits](#) offers a concise, five-step process through which small and medium-sized nonprofits can secure financial support from the private sector. The toolkit offers a host of checklists, self-analysis questions and fillable forms to help nonprofits develop and maintain these valuable relationships. The five key areas of focus include:

1. Defining who you are and why your organization exists
2. Explaining what your project is and what benefits it will deliver
3. Identifying potential donors
4. Communicating for success
5. Strengthening your relationships

Other valuable resources in this toolkit include guidelines for researching potential donors with connections to your community, a list of organizations that maintain funder databases, and instructions on how to calculate your organization's donor retention rates.

While often referring to the corporate sector, the approaches outlined in Volunteer Alberta's toolkit are easily transferable, and therefore helpful in building new, or enhancing existing funding relationships with individual donors, foundations, government and other organizations.



Social Enterprise

While only a minority of nonprofit organizations operate a social enterprise, an increasing number do so, or are considering the merits of getting started.

In this section of our report, we share the research and resources created by nonprofit organizations in Ontario and Canada on how to plan, assess, start-up, implement, and maintain a social enterprise. Whether you are currently operating a social enterprise, or considering venturing into this sort of endeavour, we hope that you will find some helpful resources to draw from.



The Canadian CED Network

The [Canadian Community Economic Development Network](#) (or CCEDNet) is a national organization whose goal is to strengthen communities by creating economic opportunities that enhance social and environmental conditions in Canada.

Inspiring Innovation: The Size, Scope and Socioeconomic Impact of Nonprofit Social Enterprise in Ontario

In 2012, CCEDNet conducted innovative research into that state of social enterprise in Ontario. They compiled the results of this study into a report called: [Inspiring Innovation: The Size, Scope and Socioeconomic Impact of Nonprofit Social Enterprise in Ontario](#).

The “Inspiring Innovation” report includes:

- An overview of social enterprise in Ontario
- Survey methodology
- Understanding the social economy
- Support for social enterprise in our province
- Profile of the size, scope, and socioeconomic impact of nonprofit social enterprise in Ontario



Enterprising Non-Profits

Enterprising Non-Profits (ENP) is based in Vancouver, British Columbia. The goal of ENP is to support nonprofit organizations in BC to expand and diversify their revenue sources by creating social enterprises.

The Canadian Social Enterprise Guide

ENP has created a wonderful resource called [The Canadian Social Enterprise Guide](#) (2nd Edition). This detailed and practical guide covers a wide array of topics from assessing to implementing to evaluating a social enterprise.

Topics covered in the Canadian Social Enterprise Guide include:

- The what and why of social enterprise
- Starting up a social enterprise
- Assessing your organizational readiness
- Feasibility analysis
- Planning for your social enterprise
- Assessing capacity and costs
- Performance measurement
- The legal context

Success Themes in Supportive Employment: How Social Enterprise Connects People with Jobs & Jobs with People

Enterprising Non-Profits has also written a helpful guide which shares strategies and resources overviewing how social enterprises can provide supported employment to people facing multiple barriers. This guide is called [Success Themes in Supportive Employment: How Social Enterprise Connects People with Jobs & Jobs with People](#).

This “Success Themes” covers a variety of topics of interest to social enterprises offering supported employment, such as:

- Snapshot of social enterprises
- HR practices
- Support and supervision
- Financial implications
- Impacts and challenges
- Measuring impact

Chartered Professional Accountants of Canada

[The Chartered Professional Accountants of Canada](#) is the national organization established to support Canada's accounting profession. They demonstrate an ongoing commitment to providing accounting, auditing, ethics and assurance standards that are relevant and appropriate for Canadian market needs.

20 Questions Directors of Not-for-Profit Organizations Should Ask About Social Enterprise

The Chartered Professional Accountants of Canada may not seem like your first stop for social enterprise advice, but they have some excellent information to share. Charities and nonprofit organizations that sell goods or services to both generate income and achieve a social mission are running social enterprises, and they are becoming increasingly common vehicles for engaging volunteers, making a positive social impact, and raising funds at the same time.

In response, the Chartered Professional Accountants of Canada wrote [20 Questions Directors of Not-for-Profit Organizations Should Ask About Social Enterprise](#). This resource provides nonprofit organizations with an overview of the issues and questions they face when establishing, running and potentially closing a social enterprise.

The 20 key questions covered include such critical subjects as:

- Planning to establish a social enterprise
- Compliance with Canadian tax laws
- Balancing multiple objectives and stakeholders
- Measuring the success of your social enterprise
- Reporting requirements

As nonprofits investigate this growing field, it is critical that they make well-thought-out decisions about whether social enterprise is a logical next step in their organizational growth. This guide from the Chartered Professional Accountants of Canada provides the foundation for making well-informed decisions before starting your social enterprise journey.

The Ontario Council of Agencies Serving Immigrants

As mentioned earlier, the [Ontario Council of Agencies Serving Immigrants](#) (or OCASI) is a registered charity formed in 1978. Its membership is comprised of more than 220 community-based organizations serving immigrants across Ontario. OCASI works to facilitate information-sharing and capacity development across the sector. While the tools and resources offered by OCASI are geared towards organizations that serve immigrants and refugees, there are many easily-transferable resources of relevance to the broader nonprofit sector.

Webinars: Income Diversification, Sustainability and Social Enterprise

OCASI has created a set of voluntary organizational standards for the Settlement sector in Ontario called [OrgWise](#). As part of their OrgWise initiative, OCASI developed a series of [six webinars](#) related to social enterprise.

OCASI's webinars on income diversification, sustainability and social enterprise cover the following topics:

1. Webinar 1: Introduction to Sustainability and Funding Diversification
2. Webinar 2: Sustainability Planning
3. Webinar 3: Collaboration, Partnerships and Mergers
4. Webinar 4: Introduction to Social Enterprise
5. Webinar 5: Social Enterprise Feasibility
6. Webinar 6: Social Enterprise Planning



SEontario

[SEontario](#) is a collaborative website designed to promote social enterprise and the social economy in Ontario. The SEontario website is hosted by regional, provincial and national nonprofit organizations. It is also supported by the Government of Ontario and the Ontario Trillium Foundation.

The SEontario Website

The SEontario [website](#) provides an online platform to promote and support social enterprise and the social economy in Ontario. This website provides examples of different types of social enterprises in action across the province, shares resources, news and events, and highlights ways to “buy social” by offering items such as their “Social Enterprise Gift Guide”.

Here are some of the useful resources you can find on the SEontario website:

- An overview of social enterprise in Ontario
- A variety of tools and resources
- Social enterprise [stories](#)
- A geo-mapped [directory](#) of social enterprises in Ontario, searchable by region and type of enterprise
- A guide to social enterprise in rural Ontario, called [Rural Vitality](#)
- An overview of the Ontario Social Economy Roundtable and the support provided by the Government of Ontario for social enterprise



Strategic Planning

Having a strategic planning to guide the important work that you do is a critical component of nonprofit management. In this section of our “Road to Excellence” report, let’s learn from the tools and resources created by various organizations in Ontario, Canada and beyond about how to effectively develop, implement, monitor, and revise your strategic plan.



Imagine Canada

Imagine Canada is a national organization dedicated to supporting Canada’s nonprofit organizations and charities. They offer an incredible array of tools and resources of value to the nonprofit sector.

Imagine Canada’s Standard A2: Strategic plan

Imagine Canada’s Standards Program is designed to strengthen nonprofit competence in five key areas. One of these five areas is *Section A, Board Governance*. Under this section, you will find [Standard A2: Strategic Plan](#).

This Standard provides guidance in the following topic areas:

- Sharing why strategic planning is important
- Showcasing the benefits of developing a strategic plan
- Overviewing the components of Standard A2: Strategic Plan
- Sharing resources, such as a strategic planning toolkit, an overview of the Board’s role in the planning process, highlighting the ten key components to successful strategic planning, and more



Chartered Professional Accountants of Canada

As previously mentioned, The Chartered Professional Accountants of Canada (or CPAC) is the national organization established to support Canada's accounting profession. They develop select publications to support both the business community as well as Canadian charities.

20 Questions Directors of Not-for-Profit Organizations Should Ask About Strategy and Planning

In order to increase Board governance capacity, the Chartered Professional Accountants of Canada wrote [20 Questions Directors of Not-for-Profit Organizations Should Ask About Strategy and Planning](#). This resource provides nonprofit organizations with an overview of the key issues and questions for the Board of Directors and staff to consider, as well as recommended practices in 20 key areas.

Topics covered include, strategic planning and:

- Organizational mission and values
- Stakeholder expectations
- External threats and challenges
- Risk management
- Planning for the future
- Funding for current and future activities and programs
- Implementation, monitoring and evaluation

Having your Board of Directors and staff answer these 20 key questions will assist your nonprofit organization to make sound decisions while developing your strategic plan.



Carter McNamara's Free Management Library

Carter McNamara is a respected expert in the area of strategic planning. A part of his consulting firm, Authenticity Consulting, Carter McNamara has developed a [Free Management Library](#) on a variety of topics, including strategic planning.

All About Strategic Planning

One section of the Free Management Library is called [All About Strategic Planning](#).

Many valuable resources and tools can be found in this topic area, including the following:

- **Understanding Strategic Planning**
 - What it is and why it matters
 - Different models and processes
 - Sample plans
- **Conducting Strategic Planning**
 - Preparing to plan
 - Setting guidelines
 - Deciding who should be involved
 - Assessing your external environment
 - Assessing your internal environment
 - Setting your strategic direction and goals
 - Updating your mission and vision statements
 - Developing your plan
 - Communicating your plan
 - Implementing, monitoring, updating and evaluating



Centre for Nonprofit Management

The [Centre for Nonprofit Management](#) (CNM) is based in Southern California. For over 40 years, the CNM has provided nonprofit leaders and organizations with resources and training to increase their knowledge and capacity. Many CNM resources are available online and are relevant to Canadian nonprofits.

The Nonprofit Answer Guide to Strategic Planning

The Center for Nonprofit Management created the [Nonprofit Answer Guide to Strategic Planning](#) in order to share several approaches to strategic planning and raise awareness of the key components required in a strategic plan.

The Nonprofit Answer Guide asks (and then provides answers to) a variety of strategic, unique and practical questions to set you on solid path to effective strategic planning:

- How can a nonprofit make sure their plan is realistic and doable?
- What is the best way to do strategic planning for a nonprofit?
- What does a good nonprofit strategic plan look like?
- Is it necessary or important to hire a consultant to do planning or can we do it ourselves?
- What's the purpose of the environmental scan and how do we get this?
- What does an organizational assessment cover, when should it be done, and how can it be helpful?
- How does a nonprofit strikes a balance between visionary, out-of-the-box thinking and pragmatics?
- How long a period should a strategic plan cover?
- We already know what we want to do, why do we need to spend all this time and effort on planning?
- How can nonprofits effectively track whether they're achieving their goals or not?



Conclusion

The Board and staff of [Community Literacy of Ontario](#) are pleased to share the promising practices and resources found in “*Road to Excellence: Research and Resources to Build Capacity in Nonprofit Organizations – VOLUME 2*”.

It is our sincere hope that our “*Road to Excellence – Volume 2*” report will help you in the important work you do.



In Community Literacy of Ontario’s “[Road to Excellence – Volume 1](#)” report, we cover the following topics:

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

If these topics are relevant to you, just click [here](#) to access our Volume 1 report.