

Resources List

TEMPLATES, TOOLS, & OTHER RESOURCES

2020

Resources List

TEMPLATES, TOOLS, & OTHER RESOURCES

Vantage Point exists to support people moving not-for-profit organizations forward – Executive Directors, board members, senior leaders, managers, staff, and volunteers.

In this document you will find a categorized and hyperlinked list of our workshops, podcasts, blog posts, and ready-to-use documents. The documents include guides, templates, and worksheets. Our resources will provide you with tools and tactics to immediately lift your organization’s capacity.

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Board Development

- Blog - 10 Attributes Of A BOSS Board!
- Blog - Let's Reimagine The Way We Think About Not-For-Profit Governance
- Blog - Looking At Governance From An Indigenous Perspective
- Document - 10 Things Working Boards Need To Know
- Document - Better Use Of Board Time
- Document - Board Assessment Resource
- Document - Board Chair & Executive Director Partnership Check-Up
- Document - Board Member Essentials
- Document - Building Your Board Development Committee
- Document - Consent Agendas
- Document - Modes Of Governance: Sharing Leadership With Your Board
- Document - Organizational Functions
- Podcast - Board Committee Structure: Going Lean
- Podcast - Board Terms: Friend Or Foe?
- Podcast - Consent Agendas: Take The Spotlight Off The Boring Stuff
- Podcast - In-Camera Board Meetings: Who, What, Why, How?
- Podcast - Mastering The Governance Foxtrot: Effective Board/ED Relations
- Podcast - The Belonging Lens: How To Transform Boards Towards Deeper Unity
- Podcast - The Board Chair And Executive Director Partnership: Strategies For Success
- Podcast - The Chronically Absent Board Member
- Podcast - Tips For Your First Six Months As A Board Member
- Podcast - What's The Deal With Robert's Rules Of Order?
- Webinar - Board Fundamentals: 10 Things Working Boards Need To Know
- Webinar - Board Fundamentals: Roles & Responsibilities
- Workshop - Advanced Governance: Strategic & Generative Conversations
- Workshop - Board Fundamentals: Board Diversity And Inclusion

- Workshop - Board Fundamentals: Critical Role Of The Board Chair
- Workshop - Board Fundamentals: Fund Development
- Workshop - Board Fundamentals: Recruitment & Succession Planning
- Workshop - Board Fundamentals: Roles & Responsibilities
- Workshop - Board Fundamentals: Supporting Your Executive Director
- Workshop - Board Fundamentals: Tools For Effective Meetings
- Workshop - Board Fundamentals: Financial Governance
- Workshop - Board Policy Boot Camp

Executive Director Development

- Document - Board Chair & Executive Director Partnership Check-Up
- Podcast - Mastering The Governance Foxtrot: Effective Board/ED Relations
- Podcast - The Board Chair And Executive Director Partnership: Strategies For Success
- Podcast - Tips For New Executive Directors: The First 100 Days
- Workshop - Board Fundamentals: Supporting Your Executive Director
- Workshop - Executive Director 101

Financial Management

- Blog - The Silver Bullet To Building The Capacity Of The Not-For-Profit Sector
- Document - Not-For-Profit Financial Systems - Checklist
- Podcast - A For-Profit Lens In Not-For-Profit Organizations
- Podcast - BC Societies Act Financial Reporting Requirements
- Podcast - Financial Governance, Financial Management, And Financial Reporting: What's The Difference?
- Podcast - Maximizing Organizational Impact Through Financial Systems
- Podcast - The Overhead Myth: Let's End It Once And For All!
- Podcast - Top Tips For Charitable Receipting
- Workshop - Board Fundamentals: Financial Governance

Fund Development

- Podcast - Board Giving: What's It All About?
- Podcast - Emerging Trends In Digital Fundraising
- Podcast - Planned Giving: Where To Start?
- Podcast - Winning Capital Campaigns
- Workshop - Board Fundamentals: Fund Development

Leadership

- Blog - 7 Key Insights On Change Leadership
- Blog - Build Your Own Pro-D Day
- Blog - Capacity Building: Enhancing Organizational Impact
- Blog - Convincing Ourselves We're Worth It – Investing In Capacity
- Blog - How Can We Better Support Emerging Leaders In The Not-For-Profit Sector?
- Book - The Abundant Not-For-Profit
- Document - 90-Day Leadership Action Plan
- Document - Annual Goal Setting & Development
- Document - Attributes Of An Abundant Culture
- Document - Goleman's Leadership Styles
- Document - Keeping A Focus On Mission And Vision
- Document - Leadership Exploration
- Document - Leading Change: The 5 W's
- Document - Mission-Focused Decision Making
- Document - Modes Of Governance: Sharing Leadership With Your Board
- Document - Organizational Chart
- Document - Organizational Functions
- Document - Performance Management System For Salaried Employees
- Document - SOAR Framework

- Document - Stretch Assignments
- Podcast - Engaging The Next Generation Of Not-For-Profit Leaders
- Podcast - Let's Talk Metrics
- Podcast - Personal Goal-Setting And Self-Awareness
- Podcast - Tools To Navigate Challenges In Arts Leadership
- Workshop - Conflict & Challenging Conversations
- Workshop - Leading & Managing Change
- Workshop - Leading From Within
- Workshop - Strategic Career Management
- Workshop - Team Collaboration

Legal Basics

- Document - The Societies Act FAQ
- Podcast - BC Societies Act Financial Reporting Requirements
- Podcast - Board Terms: Friend Or Foe?
- Podcast - Director And Officers Liability Insurance: A Necessary Cost?
- Podcast - Tips On Running An Effective Annual General Meeting
- Podcast - Top Tips For Charitable Receipting
- Workshop - Understanding The Societies Act I: Legal Basics For BC Societies

Human Resources

- Blog - Recruiting Fundraising Champions
- Blog - Succession Readiness: 10 Actions To Get You Started
- Document - Employee On-Boarding Checklist
- Document - Engaging An Executive Recruitment Firm
- Document - Executive Director Recruitment And Transition
- Document - Job Description

- Document - Project-Based People Plan
- Document - Responsibility Overview: Board/Executive Director And Employees
- Document - Steps To Organization-Wide Succession Planning
- Document - The Strategic Approach To Board Recruitment
- Podcast - Creating Safe Spaces In Your Organization – What Does It All Mean?
- Podcast - Employee Engagement Surveys: Designing For A Win
- Podcast - Finding And Engaging A Treasurer
- Podcast - Human Resource Management: Strategically Power Up Your People Plan
- Podcast - Onboarding: Successful Starts For New And Returning Staff
- Podcast - Show Me The Money! Getting Clarity On Compensation
- Podcast - Walking The Tight-Rope: Employee Vs. Independent Contractors
- Podcast - Workforce Planning (Paid, Volunteer, Contractor)
- Workshop - Board Fundamentals: Recruitment & Succession Planning
- Workshop - Culture & Engagement: The Secret To Attracting And Retaining Great People
- Workshop - Engaging Skilled Volunteers
- Workshop - Human Resource: Giving And Receiving Feedback
- Workshop - Human Resources: Executive Director Succession Planning
- Workshop - Human Resources: Introduction To Performance Management
- Workshop - Strategic People Plans
- Workshop - Tools For Recruiting

Marketing & Technology

- Blog - Four-Part Series: How And When To Leverage Technology
- Podcast - Accessible Technology (CRMs & More) For Not-For-Profits
- Podcast - Emerging Trends In Digital Fundraising
- Podcast - Make An Impact With Graphic Recording

Partnerships

- Blog - A Transition And New Opportunities For The Not-For-Profit Sector
- Blog - Collaborative British Columbia: What We Make Possible Together
- Blog - Govolunteer. Seriously, Go Volunteer!
- Podcast - Client Relations And Why It Matters
- Podcast - Learning Through Social Connections: The Human Advantage Over Google
- Podcast - Reconciliation: Urban Indigenous Engagement
- Podcast - The Truth In Truth And Reconciliation

Sector & Advocacy

- Blog - Be Involved And Stay Informed On Public Policy That Impacts Your Not-For-Profit
- Blog - Charities: You Can Now Share Your Expertise On Public Policy!
- Blog - Collaborative British Columbia: What We Make Possible Together
- Blog - The BC Budget 2020 Consultation: A Guide For Conversations With Your Local MLA
- Blog - The BC Budget 2020 Is Out: What It Means For Your Not-For-Profit
- Podcast - Abundance In The Not-For-Profit Sector: A Powerful Paradox
- Podcast - Advocacy: An Essential Practice For Mission Impact?
- Podcast - Not-For-Profit Salary Surveys: Striving For Fair Compensation In The Sector
- Podcast - Public Policy: What's It All About?
- Podcast - The 5 Principles Of Democratic Engagement
- Podcast - Why You Shouldn't Start A Charity

Strategic Planning

- Blog - Give The Gift Of Capacity
- Blog - Moving Strategy Forward During Leadership Transition: Good Or Bad Idea?
- Blog - The Silver Bullet To Building The Capacity Of The Not-For-Profit Sector
- Document - "So That" Chain: Linking Goals, Strategy & Outcomes

- Document - Circles Of Support
- Document - Environmental Scan
- Document - Mission Alignment: Where The Strategic Plan Fits
- Document - Organizational Contingency Inventory
- Document - SOAR Framework
- Document - Stakeholder Analysis Quadrant Exercise
- Document - Stakeholder Survey
- Podcast - Making The “To-Get-Done” List: Operational Plans That Work
- Podcast - Program Sustainability: Doable Or Delusional?
- Podcast - Strategic Planning Success
- Workshop - Lifecycles Self-Assessment: Understanding Capacity
- Workshop - Operational Planning Bootcamp
- Workshop - Strategic Planning ABCs: Alignment, Board Engagement, Clarity

Volunteer Engagement

- Blog - How We Engage Volunteers
- Blog - The Geometry Of Community: Creating More Volunteer Engagement Opportunities
- Book - The Abundant Not-For-Profit
- Document - Salaried Employee & Board Handbook For Working With Knowledge Philanthropists (Volunteers)
- Document - Steps To Responsive Volunteer Engagement
- Document - Volunteer Engagement (Toolkit)
- Document - Window Of Work For Engaging Knowledge Philanthropists (Volunteers)
- Podcast - Engage Volunteers To Lead: 5 Effective Practices
- Podcast - Volunteer Engagement In A Unionized Workforce
- Podcast - Volunteer Recognition
- Podcast - Win-Win Volunteer Engagement: Knowledge Philanthropy
- Webinar - Knowledge Philanthropy: How To Find & Engage Skilled Volunteers

Resources List

TEMPLATES, TOOLS, & OTHER RESOURCES

*Transforming
Not-For-Profit
Leadership*



Transforming Not-for-Profit Leadership

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