

## 2026 NONPROFIT & CHARITY GUIDANCE

# DASHBOARD 1: THE ROADMAP

### CREATING A STRATEGIC PLAN FOR YOUR NONPROFIT OR CHARITY

*"Normally by 3pm of any full-day session, I am tired and ready to go home. At David's event I had more energy than at the start of the day."*

SHARON MAYNE, C.E.O., CATHOLIC FAMILY SERVICES PEEL-DUFFERIN, BRAMPTON, ON

### OUR 3- STEP PROCESS

Built primarily for small and mid-sized nonprofits and charities anywhere in Canada.

A proven, energizing process — refined over 15 years and hundreds of engagements — and one your people will actually enjoy.

**STAGE 1: Online Surveys.** The people you serve come first — a comprehensive online survey of your clients/members — those your organization exists to serve — to ensure their voice shapes your plan from the start. Separate surveys for volunteers and partners/stakeholders based on organization's desire. Detailed analysis included.

**Option: Live client and/or volunteer and/or partner feedback sessions** — for organizations that want to go deeper. David can facilitate these short sessions in-person or virtually. Detailed analysis included.

**STAGE 2: In-Person Session 1** — your Board and staff together in an engaging 7-hour session. An engaging morning of brainstorming in intentionally mixed small groups and an afternoon of full group discussion and voting — producing a prioritized first draft list of priorities and strategies. Detailed report created.

**STAGE 3: In-Person Session 2** — within 60 days of that first day, the Board and a smaller leadership group finalize priorities and strategies in the morning; then a group of key staff and leadership create the first draft of Year 1, 2, and 3 operational tasks and SMART targets in the afternoon.

**Option: Mission, vision, and values** — refreshed or created from scratch in a session with Board and staff leadership.

**Option for large organizations:** We have a process for organizations which require more than 35 total participants in Stage 2.



### WHAT YOU RECEIVE

- **Comprehensive Voice of the People You Serve** — online surveys with detailed analysis. In-person sessions available as an add-on.
- **Document #1: Strategic Plan Dashboard** — an internal progress-tracking, easy-to-update dashboard for your Board's quarterly review, with a detailed internal workplan with Year 1, 2, and 3 tasks, SMART targets, timelines, and ownership.
- **Document #2: A polished External Summary** — for your website, funders, and stakeholders — including your mission, vision, and values statements.



## OUR UNIQUENESS

A proven, energizing process that strengthens your culture while building a terrific plan. Your team will really enjoy this process!

We've learned to involve as many staff in the process as possible: brainpower now and buy-in later!

*"I have been doing strategic plans with organizations for over 20 years in 2 countries, and this is the best process that I have ever gone through. It is fast, it is kinetic, it is highly engaging, and your process of weighted scoring to reach priorities is excellent."*

— CLAUDIA MIOR, EXECUTIVE DIRECTOR, STRATFORD F.H.T., STRATFORD, ON

Stage 3 removes the Executive Director's workload of a second full process to build the operational workplan.

## 2 DASHBOARDS = PROACTIVE GOVERNANCE



### DASHBOARD 1: THE ROADMAP

Strategic Plan Dashboard  
(we build this in this process)

Reviewed 3–4 times per year by the Board  
Shows priorities, goals, and progress  
*Where your organization is going*



### DASHBOARD 2: THE GUARDRAILS

Risk Management Scorecard  
(we build this too – see separate flyer)

Reviewed ~2 times per year by the Board  
Shows top risks, ratings, mitigation, and owners  
*What could derail the plan*

*Together. Direction + Protection = the 2 best documents for leading a nonprofit or charity*

## WHY CREATE YOUR PLAN WITH DAVID HARTLEY

- David has only worked with Canadian nonprofits and charities full-time for 19 years: 5 years as staff with Imagine Canada (2007–2012), 14 years as the lead consultant at nonprofithelp.ca (2012 to Present).
- He has trained and/or consulted in 220+ Canadian communities – every province, the Yukon, and the Northwest Territories
- Over 28,000 nonprofit leaders trained across Canada in governance, risk and strategy
- David holds a Canadian Risk Management Designation, C.R.M. (University of Toronto)
- Manda Hartley, David's partner, joins him to help these sessions run more smoothly. She brings a calm energy, creative activities, and – fair warning – occasionally keeps David honest in front of the whole room.



## WHAT CLIENTS SAY

### SKILLS UPGRADING CENTRE — LITERACY COUNCIL YORK-SIMCOE

*"David guided us with enthusiasm, humour and realistic expectations... Bravo David! This is not your typical Strategic Planning process. It explores, excites and excels in getting results! It was a tremendous help for me, and I am excited to start with new perspectives and goals."*

TRISHA PATRICK, EXECUTIVE DIRECTOR

### ASSOCIATION OF FUNDRAISING PROFESSIONALS, CANADA

*"David is a master of engagement. In a well-designed session, he helped an opinionated group with a wide range of experiences and perspectives coalesce around a plan and priorities that everyone felt proud of and vested in."*

KEN MAYHEW, PRESIDENT & CEO, WILLIAM OSLER HEALTH SYSTEM FOUNDATION

### FIRST STEP WOMEN'S SHELTER — SIOUX LOOKOUT

*"I've been involved in a number of similar sessions over the years. This was by far the best! The materials were relevant, practical and colourful. David's style and presentation kept me fully engaged over the course of a day and a half. Best of all, our organization ended up with very practical documents and action plans that we will actually be able to implement. I recommend to any size non-profit organization."*

ANDREAS ASMUS, DIRECTOR GENERAL, LEGAL AID ONTARIO — NORTHWEST DISTRICT

### DISCOVERY CHILDREN'S CENTRE — WINNIPEG

*"Thanks for bringing your energy, humour, and skill to our day of Strategic Planning. The staff, Board, and management team all enjoyed the time immensely. We laughed, challenged each other, dreamed — which led to great outcomes including a more cohesive team."*

RON BLATZ, EXECUTIVE DIRECTOR

### CANADIAN ADHD RESOURCE ALLIANCE

*"CADDRA now has a new Strategic Plan that encapsulates the Board's vision and goals AND provides a practical framework for their achievement. David's guidance was invaluable. Not only did he create a safe space for board and staff to share their ideas, he ensured the whole process was a great — and fun — learning experience."*

NIAMH MCGARRY, EXECUTIVE DIRECTOR

### INVASIVE SPECIES CENTRE

*"David's energy, knowledge, and skill helped our Board, ex-officios and staff work together to generate and refine great ideas that will be the focus of our updated, exciting strategic plan. It was an exhilarating, action-packed experience! If your Board or organization needs a catalyst for change you will be amazed by what he can do!"*

KANDYD SZUBA, PHD, RPF, BOARD PRESIDENT

### CANADIAN INTERAGENCY FOREST FIRE CENTRE

*"It was everything I expected and more. As an outsider you asked questions no one else would, forced us to look at things from a different perspective. It went very well — the group responded well and appreciated the way it was led."*

KIM CONNORS, EXECUTIVE DIRECTOR (WITH BRIAN WIENS, DIRECTOR OF OPERATIONS AND PLANNING, NATURAL RESOURCES Canada)



## WHAT CLIENTS SAY

### IMMIGRATION CONSULTANTS OF CANADA REGULATORY COUNCIL

*"Everyone was grateful to be included in the process, but really zeroed in on the opportunity to meet and get to know the Board – and achieving authentic buy-in. By all accounts... productive, engaging, fun and valuable team building."*

STEPHEN ASHWORTH, PRESIDENT & CEO

### ST. MARYS MEMORIAL HOSPITAL FOUNDATION

*"Phenomenal, fun, bonding – for all of our stakeholders involved – and educational."*

KRISTA LINKLATER, EXECUTIVE DIRECTOR

### CANADIAN COUNCIL ON CONTINUING EDUCATION IN PHARMACY

*"Our strategic planning sessions were phenomenal. David was very practical, he kept us motivated and energized throughout. We created a plan that was not only visionary but achievable. Our previous plans always required almost immediate revision. This one is a lot more focused and strategic."*

BARBARA THOMAS, BOARD PRESIDENT (AND PRESIDENT, NEWFOUNDLAND AND LABRADOR PROVINCIAL PHARMACY BOARD)

### ST. JOHN AMBULANCE – YORK REGION BRANCH

*"We're delighted with our Strategic Plan. Our key volunteers appreciated having input and will be more invested in helping us achieve our goals, and our staff took their great suggestions and ideas and moulded them into achievable goals. We have a smart direction for our next five years and we're looking forward to the journey!"*

LYNN MCLARNON, EXECUTIVE DIRECTOR

### HUMANE SOCIETY SAULT STE. MARIE

*"Thank you again for the great work! The Board and staff all really enjoyed the strategy sessions."*

MICHAEL MELVILLE, BOARD MEMBER (SENIOR RISK MANAGER, OLG)

### STRATFORD HOUSE OF BLESSING – FOOD BANK

*"David has the ability to engage staff, board and volunteers in a fun and guided way. Our strategic plan will be a path to achieve a new level of care and support within our organization and community. Thank you David for your ability to bring rejuvenation to us all."*

THERESA MCMURRAY, EXECUTIVE DIRECTOR

**Find over 200 total testimonials on our website.**



### READY TO BUILD YOUR STRATEGIC PLAN DASHBOARD?

Let's have a short Zoom call to look at real samples of our documents and discuss anything you like. Pricing options and additional information are available on our website.



**DAVID HARTLEY** Hartley Nonprofit Consulting Inc.

nonprofithelp.ca | david@nonprofithelp.ca

**Serving nonprofits and charities across Canada. Over 220 towns so far!**