



Pro Bono Consulting for Non-Profits

An Introduction to Management Advisory Service

For Shining Waters Region and
Canadian Shield Region

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September 11, 2024

An Introduction to MAS

Why are we here?

Leader Introductions

Why Are We Here?

- This seminar is an introduction to Management Advisory Service and the pro-bono consulting it provides.
- The audience is leaders and problem solvers in churches in the Shining Waters Region and the Canadian Shield Region.
- Our goal is to provide a presentation and Q&A that will enable participants to see how and where they can use MAS to assist in addressing local church challenges.

About Brian Traquair

- Brian joined MAS as a Volunteer Consultant in 2017. He leads the Finance and IT practices and does strategic planning and governance projects.
- A retired software industry business executive with board and officer experience with several non-profit organizations as well as 30+ assignments with MAS.
- Brian has been Treasurer of Runnymede United Church (www.runnymedeunited.org) for 30+ years. He is a Board member, Trustee, a member of M&P and other committees. Brian was the Treasurer of Toronto West Presbytery Corp of UCC for 10 years.



About Mark Ellwood

Mark Ellwood is a specialist in strategic planning, facilitation and time management.

- 46 years of business experience
- 10 years in marketing, starting at Procter & Gamble⁵
- Started own business in 1989
- Expert in Productivity and Strategic Facilitation
- With MAS since 2004



Session Topics

1. What is MAS?
2. Who is MAS?
3. How does MAS work?
4. Where can we help you?
5. United Church examples.
6. Potential next steps.
7. Q&A
8. Close

What is MAS?

MAS is a charitable organization founded in 1993 by a small group of volunteers who wanted to create a mechanism to **match skilled and experienced pro bono consultants with charities needing help.**

www.masadvise.org

Our mission

MAS provides volunteer consulting to help sustain and grow Canada's not-for-profit sector, especially organizations supporting marginalized communities.

Who is MAS?

- We are a team of about **fifty** volunteer consultants.
- Our backgrounds are in an array of disciplines, drawn from both charity and business experiences.
- Each Volunteer Consultant takes on projects in their areas of expertise and interest and donates their time.



How Does MAS Work? (1 of 3)

- MAS provides consulting services in the GTA, both in-person and remote, as well as remote consulting throughout Ontario and beyond.
- We work with all types and sizes of not-for-profit organizations, from start-ups to well established small to medium-sized charities.
- Volunteers are recruited from a variety of disciplines and go through a stringent interviewing process.
- We are funded by optional donations from our clients (and our volunteers).
- MAS has a code of conduct and confidentiality.

How Does MAS Work? (2 of 3)

- We provide consulting services to over **100 different non-profits a year.**
- We have worked with over 1,500 clients in the GTA since our inception.
- We do an average of **150 discrete projects a year.**
- Projects average two to three months in duration but can be a single meeting or extend over a year.
- Many projects are done by a single consultant; others involve two or more, as determined by the needs of the organization.

How Does MAS Work? (3 of 3)

- You submit a Request for Consulting Services through the MAS website (www.masadvise.org)
- The MAS coordinator will email you to confirm receipt and clarify any questions.
- The request is circulated to all Volunteer Consultants, and someone picks up the project.
- An initial meeting (in-person or video) is scheduled to write up a scope of the project.
- The project is defined in writing and undertaken.
- Once complete, a Project Close takes place where you provide feedback to MAS on the assignment.

Where Can We Help You?



There are the areas – let's explore each one in turn, with a church focus.

(1) Strategic Planning & Facilitation

- Lead the development of a church strategic plan.
- Assist in considering an amalgamation.
- Facilitate special leadership meetings.
- Work on the creation of operating plans to achieve the church mission.
- Assess the consistency of programs with the mission.
- Clarify operational and resource implications in achieving goals and plans.
- Design outcome measurements.

(2) Governance and Board Development

- Examine and explore governance models and options.
- Work with leadership to establish a governance framework for the Board.
- Identify related by-laws issues for Board consideration.
- Improve Board recruitment, orientation, training and retention
- Increase the effectiveness of Board operations.
- Maximize the value of Board committees and other supporting structures.

(3) Finance and IT Management

- Evaluate process, systems and best practice for finance, accounting, donations, rentals and property.
- Support financial analysis of amalgamations or reductions in staff and scale.
- Work through options and solutions to church deficits.
- Review financial reporting for leadership and members.
- Assess in finance management, policies and controls.
- Provide budgeting and forecasting best practices..
- Financial risk assessment and mitigation.
- System assessment and feasibility analysis.

(4) Marketing and Communications

- Increasing awareness within the congregation and the community.
- Clarifying messaging to inspire participation and donations.
- Creating a communications and branding plan.
- Identifying the operational and resource implications to implement marketing and communication projects.
- Building a longer-term brand strategy.

(5) Fund Raising

- Considering where and how to do fundraising.
- Learn different types of fundraising, the advantages and disadvantages of each.
- Create a realistic fundraising plan for next year.
- Recruit and manage a Fundraising Committee.
- Get feedback on funding proposals and what approach to take.

(6) Human Resources

- Assisting in Ministry and Personnel policies, practices and administrative systems/processes.
- Leadership development and coaching programs.
- Communications and morale strategies (board, management and staff relations)
- Effective recruiting and interviewing strategies.
- Organization planning, development and change readiness strategies.
- Volunteer recruitment and management.

United Church Examples

- In the following slides, we will walk you through some examples of projects MAS has done (and is doing) with United Churches in 2023 and 2024. Not all UCC projects are listed due to confidentiality.
 - Kingston Road United Church
 - Bloor Street United Church
 - Metropolitan United Church
 - (Runnymede United Church)
 - Christ First United Church
 - Cummer Avenue United Church

Kingston Road United Church

Assistance Request

- Assess financial sustainability and review staffing models and future plans in light of large annual deficit.

Consulting Summary

- Created an extensive financial model to evaluate outcomes based on different decisions.
- Meetings with executive to work through scenarios.
- Prepare information to educate the Board and subsequently, the congregation.

Bloor Street United Church

Assistance Request

- Refine operating model in light of a major church property redevelopment (including being out of the church for some years) and trends in giving and costs.

Consulting Summary

- Meetings to build a common understanding of the financials and the pre- and post-development situation.
- The process included comparisons with financials from other churches and scenario analysis, with zero-based budgeting and cost allocations when setting priorities.

Metropolitan United Church

Assistance Request

- Advise the Board and Trustees on a long-term large-scale capital budgeting and expenditure plan, taking into account giving, property revenues and expenditures.

Consulting Summary

- Meetings with leadership and Board members to discuss capital needs, overall financials and budgets.

(Runnymede United Church)

Initiative (Brian experience but not via MAS)

- Runnymede and Windermere United Church needed to assess, decide upon and implement an amalgamation

Summary

- Discussion and creation of an amalgamation agreement.
- Communication and decision process for congregations.
- Ensuring mission alignment and leadership participation.
- Achieving financial, operations and staff integration.
- Nine months from first talks to a two-campus church.

Christ First United Church

Assistance Request

- Need for a strategic plan

Consulting Summary

- Engaged Council plus congregation in strategic plan discussions

Cummer United Church

Assistance Request

- How to use funds arising from the sale of a property after amalgamation.

Consulting Summary

- Work with the congregation to assess renovation priorities.

Potential Next Steps

Potential Ways Forward

- Contact MAS or Brian to discuss a potential project and fit with MAS.
- Go to www.masadvise.org and open a project with us.
- MAS could work with the Region to do a multi-church workshop on strategy or finance or another topic of broad interest.



Question and Answer

Questions?

(Raise your hand or wave)



Management Advisory Service

<https://masadvise.org/>

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Thank you!

MAS 
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