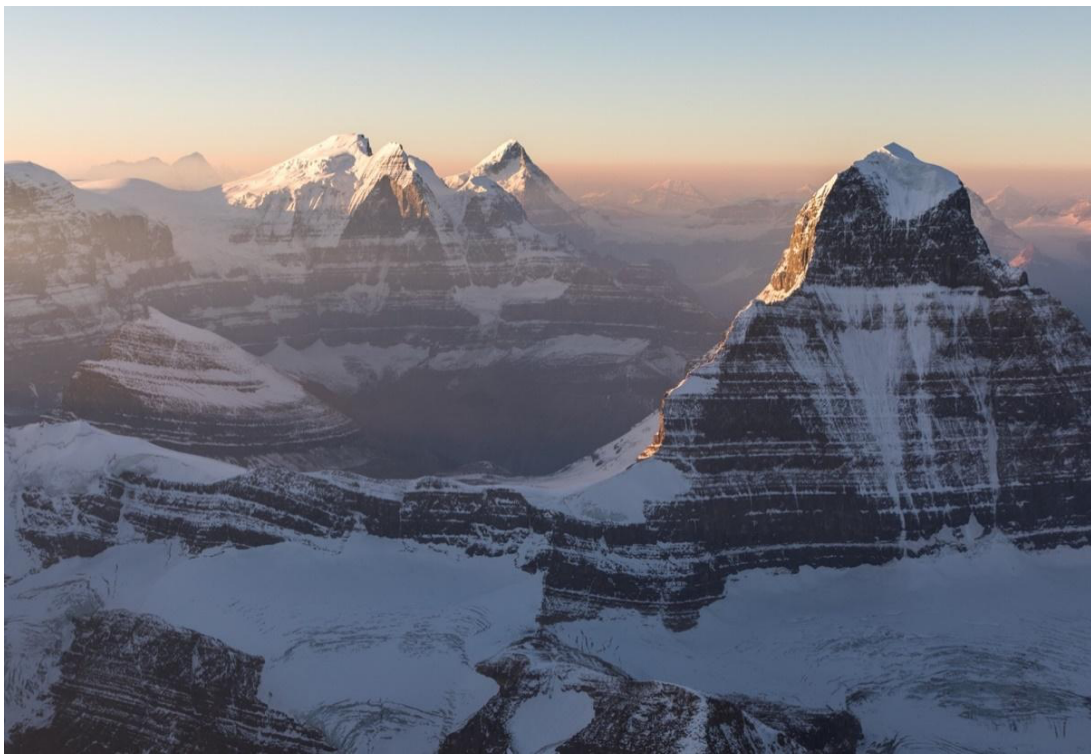


# MOVING MOUNTAINS

## Knowledge Builder



*Photo by: Peter Lemieux*

**Final Report: February 28, 2022**

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## **Executive Summary**

An overarching goal of the Moving Mountains initiative is to increase civil society group collaboration in the Bow Valley. This goal, in part, is in aspiration to make it easier for individuals and organizations within the civil society sector to access funding to create greater impact. Building local capacity and economic knowledge, including the ability to identify and foster feasibility and sustainability of social enterprises in the Bow Valley, can grow economic empowerment, remove barriers to acquiring funding and ensure financial stability of civil society in the Bow Valley.

To that end, knowledge building activities were undertaken specific to the identification of innovative fund generation and fund distribution models that could enhance the financial health of Bow Valley civil society groups. Particular attention has been paid to those provincial, national, and international models and initiatives that could also enhance collaboration among groups.

### **The Current Context**

The civil society sector has experienced shifts in operations as a result of the Covid-19 pandemic. For many groups donations and fundraising have seen a decline, while requests for services have increased. Some have been unable to operate, or have operated, in an altered manner due to public health restrictions. There have been challenges but there has also been a display of resilience and increased levels of collaboration among groups to ensure community needs have been met (CCVO, 2020).

The Calgary Chamber of Voluntary Organizations (CCVO) document *Community Prosperity Now* (2021) provides a blueprint for community recovery and suggests that civil society groups will need to “be bold”, looking at new ways of operating in order to navigate during this time. The *Moving Mountains Knowledge Builder* identifies several models

that could benefit Bow Valley civil society groups to boldly re-envision their operations. These models are outlined in great detail in the Appendices of this document. They are:

*a) Shared Platforms*

Nonprofit Shared Platforms (SP) is a term describing a number of different models. Essentially these platforms allow for resource sharing on some level. The most common models (though there are many variations on these) are:

A larger, formalized nonprofit provides a wide array of supports and expertise including; administrative, grant-making, strategic and fiscal to less formalized groups and initiatives.

A number of nonprofits that are individual entities, band together to create a “platform hub”. Administrative efficiency results from the sharing of similar services such as HR, accounting/bookkeeping and grant administration.

The advantages of these models overall are that they are collaborative in nature; they are flexible and can fit the distinct needs of the group involved; they are scalable; SP’s allow for short and long-term relationships and can enable smaller groups to focus on initiative development as opposed to organizational administration.

ACCESS, a province-wide shared platform for nonprofits and community groups currently being developed by the Alberta Community Co-operative Association (ACCA), targets a wide array of services. This could be a beneficial resource for Bow Valley organizations looking to decrease administrative costs and connect with groups across Alberta.

*b) Social Enterprise*

A Social Enterprise (SE) is defined as “any organization or business that uses market-oriented production and sale of goods and/or

services to pursue a public benefit mission” (Canadian Task Force on Social Finance 2010).

A social enterprise is not a legal entity and is not included in the Canadian Income Tax Act. For this reason, an SE can operate in the form best suited to it e.g. charity, co-op or commercial corporation.

Typically, SE’s aim to address several “bottom lines” including:

- Financial
- Cultural
- Social
- Environmental
- Training and Employment

The key benefit to a social enterprise is that it can provide needed goods or services within a community while simultaneously increasing an organizations fiscal stability. Other benefits may include; providing training and employment, furthering the organization’s mission or mandate and increasing its visibility.

The start-up of social enterprises can be financed through the sale of goods or support from foundations, donors, community banks and grants, to name a few. Federal and provincial funding programs currently exist to encourage the development of SE’s.

There are numerous types of social enterprises in existence, from second-hand clothing retail to hotels, bakeries and restaurants. The possibilities are as broad as the needs for goods and services in a community are.

### c) Donor Collaborations

A donor collaborative can be broadly defined as a group of funders working together to maximize their impact (Inside Philanthropy, Learning Centre, retrieved 2021). There are numerous models of

collaboration that accommodate a diversity of funders, from an individual donor to large funding bodies.

The advantages of collaboratives are that they allow funders to exchange ideas, raise awareness of issues, work together to explore common challenges and possibly align their grantmaking through shared strategies or pooling resources to make collective granting decisions (Innes, 2018).

Building successful collaborations requires a champion who can bring others to the table around an issue along with a process that enables inclusivity, interactivity and can build trust among members (The Philanthropic Initiative, 2009; Panorama, 2019).

Several documents have highlighted the need for funders to consider altered funding strategies in order to support the longer-term goals of community-based groups and initiatives (CCVO, 2021; Carrington, Kail & Wharton, 2017). The development of a funder collaborative could help to identify unique opportunities to shift funding processes and broaden funding guidelines.

## **Recommendations**

The three models highlighted have the potential to enhance fiscal sustainability of organizations and initiatives in the Bow Valley while increasing a collaborative approach by both civil society groups and those who fund them.

Based on the opportunities these models may hold for the Bow Valley, recommendations have been made to further investigate the potential of their use.

These recommendations include:

- The Moving Mountains teams review the document with an eye to determining if there are areas to be delved into more deeply,

potential partnerships to be created and adding further recommendations.

- To further anchor this knowledge gathering endeavor, data collection from Bow Valley civil society groups in terms of assets, needs and interests could be beneficial.
- Connect with ACCESS, the Alberta Nonprofit Shared Services Platform, to determine if there may be ways to work together. Have ACCESS present their services and support plan to civil society groups in the Bow Valley.
- Connect with the Alberta Nonprofit Network (ANN) to determine how they can support groups in the Bow Valley. Have ANN present their services to Bow Valley Civil Society Groups.
- Explore the potential for gathering Bow Valley funders together to determine where synergies might occur and what opportunities for collaboration might exist.
- Based on the current data, a focus on those nonprofit organizations likely to be most impacted by the pandemic might be a strategy to pursue. Those organizations would include nonprofits who were ineligible for government supports, without charitable status, smaller in size with a high percentage of their budgets originating from fundraising events or through programming that could not be maintained due to public health restrictions.
- Inspire possibility through creating a speaker series around social venture/social enterprise. Ideas for speakers are presented in the Resource Section of this document.

## **INTRODUCTION**

This paper is the culmination of research into models and initiatives that could support Bow Valley civil society groups to improve their financial health through greater collaboration both within and outside of the third sector. This document is not to be considered the end point, but rather the starting point for rich discussions related to what may be possible and emanating from those discussions, targeted research and piloting of models of interest to civil society groups.

## **WHY CIVIL SOCIETY GROUPS MATTER**

Civil society, as defined by the Government of Alberta, includes “non-profit and voluntary organizations, registered charities, informal groups or movements pursuing shared interests or values, and private-sector organizations and individuals pursuing social good.” (Government of Alberta, 2022).

These groups are instrumental in contributing to the well-being of communities and to the economy. While little to no data exists related to the importance of civil society groups as a whole, a 2021 Imagine Canada Sector Monitor, indicated that nonprofits and charities account for 8.5% of GDP and employ 2.4 million Canadians, of which 70% are women (Imagine Canada, February 2021).

The Covid-19 pandemic has created distinct challenges for civil society groups. Overall, donations to the sector have decreased, while the need for service has increased. Some services have not been operational for periods of time due to public health restrictions. What follows is the most recent data on the impacts of the pandemic on these groups and while specific to charity and nonprofit groups; it does paint a picture of the impacts felt broadly by groups engaged in this work.



## **THE CURRENT STATE OF GIVING IN CANADA**

In April, 2021 an Angus Reid Survey was undertaken on behalf of the “Telus Future Friendly Days”. The focus of this survey was to determine the effects of the pandemic on giving in Canada. This survey found that:

Overall donations of time and funds had decreased; and,

- There was a 25% decrease in giving compared to pre-pandemic.
- 77% of those who give back through volunteerism found it more difficult to do so during the pandemic due to safety barriers.
- 46% of Canadians volunteered their time in some capacity prior to the pandemic versus 30% in 2020 and 25% in 2021 (to survey closing date.)

The desire for Canadians to “give back” however, remains strong, with:

- 60% more interested than ever in giving back to their communities to support those in need.
- 94% of respondents believing that giving back is important and 83% that giving back helps them feel connected to their community (Angus Reid, 2021).

How people give and the causes they are giving to has shifted during the pandemic. Online giving has grown +86% year over year. Donations to social services and indigenous charities have also seen higher than average growth; with social services growing by 119% and indigenous charities by 125% (Canada Helps, 2020).

In 2020, 4 in 5 Canadians said they would choose supporting a smaller community focused charity vs a larger charity working at the national level (Angus Reid, 2020).

## **THE CURRENT STATE OF THE CIVIL SOCIETY SECTOR IN CANADA**

While most of the data available is specific to charities, nationally, and to nonprofits, provincially, the similarities of experience suggest the civil society sector as a whole has been required to adapt to many changes since the onset of the pandemic.

As the pandemic has continued, evidence of a gap between the demands placed on charities, and their capacity to meet those demands has appeared. Close to half of charities are reporting a higher demand for services which is up from about a third in 2020 (Imagine Canada, August 2021 pg.3). In this same survey however, only 7% said their capacity had increased significantly (Imagine Canada, August 2021 pg.4).

This gap can be attributed to several factors, possibly two of the most significant being: 1. Economic losses and 2. A shortage of staff and volunteers

### **1. Economic Losses**

A summary of key findings from Imagine Canada's Sector Monitor published in August 2021, indicates that few charities are operating as usual. Organizations are also unevenly impacted, depending on their revenue model. For example, a significant proportion of arts, culture and recreation organizations reported declines in demand (related to public health restrictions) and capacity (Imagine Canada, August 2021, pg.2.). Data from the Imagine Canada's Sector Monitor report published in February 2021 has also been included. While this reflects what occurred earlier in the pandemic, the data selected identifies some areas of economic loss that may take significant time to be recouped.

Other findings that reveal the economic challenges experienced by charities include that:

- More than 4 in 10 charities continue to face declines in revenue (Imagine Canada, August 2021, pg.5). Among these charities there is a 44% decline which remains the same as the Imagine Canada survey in late 2020 (Imagine Canada, August 2021, pg.6).
- Revenue from donations and earned income declined for most charities, while support from government tended to increase (Imagine Canada, February 2021, pg.3).
- 75% of charities reported a decline from at least one type of donation since the beginning of the pandemic. Event-based fundraising has seen the most pronounced decline (Imagine Canada, February 2021, pg. 13.).
- To offset the losses, organizations have drawn on reserve funds, acquiring debt, selling assets, and reducing expenses related to their paid and volunteer staff (Imagine Canada, February 2021, pg.14).
- Smaller, community-focused organizations (serving a single neighbourhood, town, city or rural municipality) were more likely to have reported decreased capacity. In addition, smaller-sized organizations as well as arts organizations are more likely to have temporarily suspended their operations (Imagine Canada, February 2021 pg.4). Education, research and health organizations were somewhat more likely to report both an increase in demand and a decrease in capacity (Imagine Canada, February 2021, pg.6).

Looking forward and anticipating what the outlook for these organizations will be, based on current trends indicates:

- Nearly one in four charity leaders believe their organization will be able to operate for, at most, one more year. Close to one third believe they will be able to operate for more than one year (Imagine Canada, August 2021 pg. 8).

## 2. Shortage of Staff and Volunteers

- In the Imagine Canada, February 2021 report (pg.21), 31% of charities had fewer paid staff than prior to the pandemic. However, a more recent survey suggests that one in four organizations believe the number of paid staff will increase over the next 3-4 months. (Imagine Canada, August 2021, p.g 10)
- 60% of charities are reporting a decline in their number of volunteers and a 58% reduction in volunteer hours. (Imagine Canada, February 2021, pg.20) The predictions for an increase in volunteer hours however sees the proportion of charities anticipating an increase being only slightly larger than the proportion anticipating a decrease. (Imagine Canada, 2021, pg.10)
- 50% of charities are reporting that their staff's ability to maintain an appropriate work/life balance and avoid burnout has decreased. With 49% of charities increasing time and resources devoted to employee and volunteer mental health and wellness (Imagine Canada, August 2021 pg.7).

## THE ALBERTA NON-PROFIT REALITY

Two Alberta non-profit surveys undertaken in 2020, illustrate similar findings to the national charity data. While some rebound may have occurred between 2020 and 2021, the data indicates that the extent of initial impact will necessitate longer-term supports in order to achieve recovery. The Calgary Chamber of Voluntary Organization's (CCVO) July 2020 Report, *From Emergency to Opportunity: Building a Resilient Alberta Nonprofit Sector After COVID-19* indicated:

- Revenue from fundraising decreased by 85% while revenue from earned income saw a 78% decrease.
- Nonprofits experienced a 73% increase in the demand for service.

- 39% experienced a temporary or permanent closure of their organization.
- 51% of organizations reduced staff hours due to budgetary concerns  
(CCVO 2020 pg.1).

The Alberta Non-Profit Network undertook a “pulse check” between October 26<sup>th</sup> and November 6<sup>th</sup>, 2020 with 500 responses collected. While this report is not intended to be statistically representative of the sector, it does outline some key trends which fit with the other data presented. These trends include:

- Respondents are experiencing increased demands with decreased capacity while working in increasingly complex environments (pg.9).
- Financial resources are integral in order to deliver on their mission in the next 12 months (pg.5).
- The majority of respondents indicated revenues have decreased and funding is required for core organizational activities (pg.13).
- Staff mental health is a key concern (pg.5).

## **FINDINGS IN THE BOW VALLEY**

Very little data exists as to the makeup of the civil society sector in the Bow Valley. We know that over 225 civil society groups call the Bow Valley home. Approximately 80 of these groups are registered charities including 17 churches (Canadian Revenue Agency, 2022). In June 2020, the Town of Canmore conducted a survey to examine how non-profits, charitable groups and community organizations were being impacted by the Covid-19 pandemic. It was available to 85 Canmore non-profit and community groups with 48 respondents: 11 Social, 12 Cultural and 25 Recreational.

While this data could not be considered representative of the entire sector, the key themes that emerged from this survey appear to echo what has been documented provincially and nationally.

These include:

- The cancellation of fundraising events, activities, and casinos combined with a loss of funds generated through registration, programming, and event admission, lead to an abrupt loss of revenue.
- Over 40% of organizations were forced to reduce salaries/ payroll during the pandemic and 27% of organizations had to temporarily lay off staff.
- More than half of respondents have no, to low operating reserve funds and many were ineligible for government funding leading to low financial stability.
- Social agencies are struggling to provide services in a meaningful way.

## **CAUSE FOR HOPE**

While the picture painted by this data may appear to be a bleak one, with a sector challenged to meet greater demands with decreased funds, there are signs of improvement. Some charities are reporting a more positive situation than in the early stages of the pandemic as health restrictions diminish allowing for fundraising activities, in-person programming and increased volunteerism.

Other factors that have led to a more positive outlook include:

- Federal government supports which have played a significant role in preserving employment within charities.

42% of charities have received some form of support from one or more of the following programs: the Canada Emergency Wage Subsidy

(CEWS), the Canada Emergency Commercial Rent Assistance (CECRA), and the Canada Emergency Business Account (CEBA) (Imagine Canada, February 2021, pg. 17).

53% of charities with paid staff have applied for CEWS and the support is helping keep on average, 54.8% of paid staff positions for these organizations (Imagine Canada, February 2021, pg. 18).

- An increased display of resilience, innovation and collaboration within and between organizations. 78% of charities reported having increased innovation and experimentation. Though most of the current focus is on short-term survival strategies. 67% of charities have been prioritizing work that addressed immediate challenges over work that builds or maintains their long-term organizational capacity (Imagine Canada, February 2021, pg. 9).
- Charities making investments to meet higher demand and adapt to provide services to the populations they serve and fulfill their missions. (Imagine Canada, 2021)

Optimism about the future is correlated to organizational size, revenue trends and demand/capacity balance. Larger organizations are more likely to forecast being able to operate indefinitely, while smaller ones are more uncertain how long they can continue to operate. (Imagine Canada, August 2021, pg.8)

One can only speculate that civil society groups that do not have charitable status, are smaller in size are reliant on event fundraising or funds from programs and services and who have no to low reserve funds, may be less optimistic as to the long-term outlook and may lack capacity to identify new ways of delivering services to bolster their outlook.

## **COMMUNITY RECOVERY**

Now more than ever the way forward will require the civil society sector to develop new partnerships, increase innovation as to how

services are being offered, evaluate current services and look at economies of scale.

In June 2021, CCVO released *Community Prosperity Now: A Blueprint for Recovery*. This blueprint highlights some key activities that are required as communities recover from the impacts of the pandemic. While this document suggests that impacts will be felt by the nonprofit sector for some time to come, there are activities that can be undertaken to help improve the outlook for the sector. These activities include:

- a) collaboration between this sector, the private sector, the provincial government, funders and stakeholders “working together better with re-framed thinking of the nonprofit sector”
- b) the nonprofit sector being bold: advocating for the communities they work in but also for the sector; telling their stories.
- c) the nonprofit sector creating more possibilities by focusing on select key priority areas
- d) governments and community champions supporting an investment in social infrastructure (CCVO, June 2021, pg.3).

The CCVO document also highlights how funders can support nonprofits by:

- a) Altering traditional funding procedures that remove spending restrictions on existing grants.
- b) Supporting operational costs that recognize an increase in demand for services, where nonprofits will need to be able to take care of their staff as they are supporting their clients.
- c) Adjust assumptions and expectations about costs that go into a project that can create unrealistic pressures on organizations to keep their administration costs as low as possible (CCVO, June 2021 pg.5).



## **WAYS TO INCREASE CIVIL SOCIETY SECTOR INNOVATION AND COLLABORATION**

As a result of the knowledge gathering process, several models emerged that could provide opportunities for the Bow Valley civil society sector to collaborate, innovate and ultimately increase their financial sustainability. Three promising models identified, were the development of:

- a) Nonprofit shared platforms (Appendix 1),
- b) Social enterprises/ventures (Appendix 2), and
- c) Donor collaborations (Appendix 3).

These models are extensively reviewed in the discussion papers included in the Appendices of this document.

### **POTENTIAL MODELS OF INTEREST**

Other models, initiatives and nonprofit supports/resources while not meeting all of the criteria for applicability, do warrant further review and are included below.

Given that one of the key economic drivers in the Bow Valley is tourism, what follows are models used in other tourist locales that could apply.

#### **Point of Sale Charitable Donations**

Point of Sale Charitable Donations are a form of embedded charity in which an “act of philanthropy is built into a larger financial transaction” (McMahon 2022). There are a number of ways in which embedded giving can work; from grocery stores asking for an additional small fee to be added to your bill to support a local cause, to stores offering tokens to people who bring their own bags; with the tokens being donated back to charities or having a percentage of your purchase going to charity. There are numerous examples of how this model can work.

The benefits to embedded giving are that it can make charitable donations easier for people and encourage them to learn about and give to a wider range of causes. The donation may be a small amount, but collectively can add up to large contributions for the targeted charity.

A survey by Ipsos Reid (2015) highlighted the challenges to embedded giving. 62% of Canadians reported being opposed to retailers asking them to donate to charity at the cash register. Almost two-thirds say that they have refused a request for donation. 62% said they were more likely to contribute if they knew how the retailer was also contributing.

Obeng et al (2019) highlight several ways to encourage point of sale giving. These include:

Reward customers for donating- give customers something that has a similar value in return. Exceptions to this are giving around the holidays and to children's causes. Names on stickers or balloons do not appear to enhance a programs' effectiveness.

Carefully choose the donation method and make the process simple; e.g. a yes or no PIN pad option. Giving customers the option to "round up" their payments to the nearest full dollar amount with the difference going to charity is perceived as less painful than a request for a flat amount (Kelting et al, 2018).

Employees should be informed and engaged to serve as "charity ambassador's". Customer service can be crucial to a campaigns' success.

People experiencing high quality service are twice as likely to give as those experiencing normal levels of service and 9X as likely as those experiencing inferior service; unless they doubt the authenticity of the service. (Obeng et al., 2019)

There was greater satisfaction with a retailer when it was believed the retailer was truly committed to social responsibility. This can be helped by publicizing store involvement through signage.

Other research suggests that timed giving campaigns are more successful than year- round campaigns. For example, in the Bow Valley a campaign targeting the summer months of July and August may be ideal.

### **Tourism Funding- Organized Tours and Group Conferences**

- Donations- Many travel companies encourage their clients to make donations to projects in destinations they visit, or the donation is incorporated into the tour.
- Staff or traveller volunteering programs-using company volunteers or individual travellers at local projects, either as an extra set of hand or using their skills to develop a fundraising campaign, running training seminars or strategic planning etc.
- Develop tourism social enterprises or social impact tours.

### **Visitor Levies**

There are a variety of reasons countries (and some cities) are choosing to institute and international visitor levy; for some it is an attempt to curb the number of tourists and prevent over tourism, for others, it is a means of maintaining or developing much needed tourism facilities and to protect natural resources.

Levies are paid in a variety of ways; some, upon entering a country, while others are incorporated into taxes and paid at the hotel or worked into airline tickets. For example, in New Zealand, there is a \$35 international visitor conservation and tourist levy paid upon entering the country. This levy supports projects to improve management and protection of area destinations, build a tourism workforce and enhance visitor safety. In Greece, the tourist tax is based on the number of hotel stars or number of rooms rented. It can

be anything up to €4 per room. Germany charges a “culture tax” and in cities such as Frankfurt and Berlin, a “bed tax” (Campbell 2022).

A unique model for distribution of levies has been created in Asheville, North Carolina. In 2001, the Tourism Development Authority increased its hotel occupancy tax and set aside 25% of the money to fund projects that generate visitation and economic impact in the region. This Tourism Product Development Fund is the largest source of capital grants available to non-profits in the community and has funded the building of a community theater, museum of science and African-American Heritage Centre to name a few of the 39 projects funded since 2011 with a total of \$44 million being distributed (West 2019).

## **CONCLUSION**

Given the climate within which civil societies are currently operating, there exists an opportunity to look at new ways of achieving organizational missions. The literature highlights that going forward it is imperative for success that these ways include collaboration among groups and innovative strategies. This paper has provided a few key examples of what is possible but as groups come together to share their experiences, many more may be unearthed.

## **RECOMMENDATIONS**

- The Moving Mountains core team review the document with an eye to determining if there are areas to be delved into more deeply, potential partnerships to be created and add further recommendations.
- To further anchor this knowledge gathering endeavor; data collection from Bow Valley civil society groups in terms of assets, needs and interests could be beneficial.

- Connect with ACCESS the Alberta Nonprofit Shared Services Platform to determine if there may be ways to work together. Have ACCESS present their services and support plan to civil society groups in the Bow Valley.
- Connect with the Alberta Nonprofit Network to determine how they can support groups in the Bow Valley. Have ANN present their services to Bow Valley Civil Society Groups.
- Explore the potential for gathering Bow Valley funders together to determine where synergies might occur and what opportunities for collaboration might exist.
- Based on the current data, a focus on those nonprofit organizations likely to be most impacted by the pandemic might be a strategy to pursue. Those organizations would include those nonprofits who were ineligible for government supports, without charitable status, smaller in size with a high percentage of their budgets originating from fundraising events or through programming that could not be maintained due to public health restrictions.
- Inspire possibility through creating a speaker series around social venture/social enterprise. Ideas for speakers are presented in the Resource Section of this document.

## **LEARNING AND DEVELOPMENT RESOURCES**

The following is a list of useful categories linked to learning and development along with examples of resources for each category.

### **Alberta Resources**

Alberta Non-profit Network: The Alberta Non-profit Network was launched in June 2018. It is an independent network of nonprofit organizations from across Alberta, all working together to create a strong and resilient nonprofit sector. The network collectively works to

create a common vision for the sector and articulates the sector's value to a range of stakeholders including governments and funders. ABNN also leverages opportunities for alignment and collaboration among nonprofits, creating capacity to solve systemic issues facing the sector and the communities served. <https://albertanonprofits.ca/>

Alberta Community Co-operative Association: Alberta Shared Services Platform-ACCESS <https://www.acca.coop/shared-services-access>

Alberta Crowdfunding Platform for Nonprofits.  
<https://crowdfunding.alberta.ca/>

Calgary Chamber of Volunteer Organizations  
<https://www.calgarycvo.org/>

## **Shared Platforms**

Ontario Non-profit Network Shared Platform Series:  
<https://theonn.ca/our-work/our-regulatory-environment/shared-platforms/>  
[https://theonn.ca/wp-content/uploads/2021/01/Shared-platforms\\_-An-introduction-1.pdf](https://theonn.ca/wp-content/uploads/2021/01/Shared-platforms_-An-introduction-1.pdf)  
[https://theonn.ca/wp-content/uploads/2016/03/ONN\\_Shared\\_Platform\\_Guidebook.pdf](https://theonn.ca/wp-content/uploads/2016/03/ONN_Shared_Platform_Guidebook.pdf)  
<https://theonn.ca/wp-content/uploads/2017/12/Shared-Platforms-Case-for-Support-Nov-2017.pdf>

Neighbourhood Trust  
<https://pfc.ca/wp-content/uploads/2020/07/2-neighbourhood-trust-report.shared-platform.pdf>

Strengthening Collaboration  
<https://static1.squarespace.com/static/59e60f756f4ca39efcf555ca/t/60759431a68d743283227d3d/1618318397056/OTF-Collaboration-Report.pdf>

Better Together: A Guide for Charity/Non-charity Partnerships (an excellent guidebook)  
[https://communityfoundations.ca/wp-content/uploads/2019/05/Better\\_Together\\_2015.pdf](https://communityfoundations.ca/wp-content/uploads/2019/05/Better_Together_2015.pdf)

### Mergers

[https://www.mtroyal.ca/nonprofit/InstituteForCommunityProsperity/\\_pdfs/Merging-for-Good-1.pdf](https://www.mtroyal.ca/nonprofit/InstituteForCommunityProsperity/_pdfs/Merging-for-Good-1.pdf)

Do Some Good: Do Some Good is a social enterprise whose mission is to bring individuals, community organizations and businesses together on one platform to build stronger local communities across Canada. <https://www.dosomegood.ca/>

### **Social Enterprise/Ventures**

#### Social Enterprise Structural Options

<https://integralorg.ca/blogs/posts/an-overview-of-the-structural-options-for-social-enterprises-in-alberta/>

Manwaring, S.M. & Valentine, A. (2012). Social Enterprise in Canada: Structural Options.

[http://www.marsdd.com/wp-content/uploads/2012/04/MaRSReport-Social-Enterprise\\_2012.pdf](http://www.marsdd.com/wp-content/uploads/2012/04/MaRSReport-Social-Enterprise_2012.pdf)

Adapted from Jim Fruchterman's for Love or Lucre from Stanford Social Innovation Review.

[http://www.ssireview.org/articles/entry/for\\_love\\_or\\_lucre](http://www.ssireview.org/articles/entry/for_love_or_lucre).

### **Social Enterprise Ideas/Learning Opportunities**

#### New Path Foundation

<https://www.newpathfoundation.org/the-common-roof>

### **Social Innovation Supports and Speakers**

Alberta Social Innovation Connect (ABSIC): ABSI (Alberta Social Innovation) Connect is a collective of Alberta-based organizations and individuals who want to address the root causes of today's most pressing issues and believes this requires working and learning together. <https://www.absiconnect.ca/about-us>

Indigenous Social Venture, Non-profit, Resilience: Cowboy Smith X-Red X Talks founder, film maker, artistic director of the Iniistsi Treaty Arts society, a non-profit organization dedicated to activating the true spirit and intent of Treaty #7. Founder of the Elk Shadow Performing Arts Clan and the Noirfoot School for Cinematic Arts.

<http://speakerscanada.com/cowboy-smithx/>

Michael Shuman, author, speaker.

The Small Mart Revolution: How Local Businesses are Beating the Global Competition (2007) Berrett-Koehler Publishers.

<https://www.youtube.com/watch?v=eNYMU4V8nbs>

<https://twitter.com/smallmart?lang=en>

Suzanne F. Stevens, author, speaker. Philanthropy, entrepreneurship.

<https://youmewe.ca/suzanne-f-stevens-bio/>

Momentum Calgary

<https://momentum.org/programs-services/>

Social Enterprise Council of Canada

<https://secouncil.ca/>

The Centre for Social Innovation

<https://socialinnovation.org/>

Whistler Social Enterprise Resources:

Business Model Canvas - Business Canvas - Business Models & Value Propositions (strategyzer.com)

Indigenous Tourism Start-Up Program - Indigenous Tourism Start-up Program - Whistler Centre for Sustainability

Indigenous example: Whistler's Cass Spence named inaugural winner of Indigenous Tourism Startup Program's pitch event - Pique Newsmagazine

Social venture examples (2017): Meet the 2017 Social Venture Challenge Participants - Whistler Centre for Sustainability

Social venture examples (2016): Social Venture Challenge 2016 Participants - Whistler Centre for Sustainability



Social venture examples (2015): Social Venture Challenge 2015 Participants - Whistler Centre for Sustainability  
Food Social Venture Examples - Root Ventures 2017 Participants - Whistler Centre for Sustainability

Whistler Re-Use-It: <https://mywcss.org/social-enterprises/>

The Social Venture Institute  
<https://hollyhockleadershipinstitute.org/svi/>

## **International Social Enterprise Resources**

National Institute for Social Impact US  
<https://ni4si.org/>

Australian Social Change Central  
<https://www.socialchangecentral.com>

British Council: Social Enterprise in the UK  
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# **APPENDIX 1: NONPROFIT SHARED PLATFORMS**

## **Non-profit Shared Platforms**

### **Discussion Paper #1**

**January 10, 2022**

#### **Introduction**

The term Non-profit Shared Platform (SP) is essentially a “descriptor that can refer to many different models” (Wheeler, 2015). The intent of these models, though differing in approach, is the provision of support by more formalized and well-established non-profit organizations to smaller groups, networks, collaborative projects, or community initiatives. This enables these smaller entities to achieve their purposes without having to incorporate for a time limited undertaking or build costly infrastructure (ONN,2016). The type of support offered may vary depending on the model but can include: administrative, strategic, accounting/bookkeeping, grant writing, project management. Coupled with the opportunities these models provide for capacity sharing and the nurturing of emerging leaders, an SP offers a sound base from which to achieve good outcomes.

Originating in the United States and termed “fiscal sponsorships”, shared platforms were viewed as an “effective and efficient mechanism for launching new non-profit entities that deliver public value” (Marsland, 2013). In the Canadian SP models, newly created non-profits may or may not be an outcome. The outcomes may be a more efficient use of resources, cost efficiency and/or the ability to focus more effectively on the initiative. Many US models are beyond what is currently possible in Canada given the charitable rules outlined in the Income Tax Act and as such, the examples and emphasis in this paper will draw on the Canadian experience of Shared Platforms.

In Canada, SP’s have been in existence in their various forms for a number of years, however they have come to the fore in recent years as a means to addressing the complex social issues facing communities and as a response to the Covid -19 pandemic. Throughout Canada, in communities large and small, new social programs have been required or have needed to be re-tooled to meet local community needs. In addition, “the challenges faced by racialized and low -income communities have become more prominent” (Ontario Non-profit Network, 2017). To address these challenges, new

leaders have emerged who may not have the expertise to navigate the complex processes of grant funding, and funders may not have confidence funding these types of programs or initiatives without strong, experienced leadership. The other challenges experienced by small non-profits and community groups that have led to an interest in SP's are commonly known: inadequate resources, a lack of specialized administrative staff, underdeveloped infrastructure (Goggins, Gregory & Howard, 2009; Lecy & Searing, 2015).

Shared Platforms have emerged as an opportunity to bridge these gaps in capacity.

### **Advantages of the SP Models**

The Shared Platform concept is a shift away from the health of individual organizations and toward the health of the system within which it operates. This can ultimately lead to greater outcomes and systemic change. It is collaborative in nature. It also allows a group intent on making change to move more slowly, as it does not have to put its energies into incorporation and developing the organizational, administrative and financial systems that allow this to happen (Marsland, 2013).

What makes the SP appealing is that it:

- can be designed to fit the distinct needs of the groups/projects involved
- is scalable - although very small SP's are not as successful
- allows for development of short or long term relationships
- maximizes community efforts and donor impact and lowers risk for funders (ONN,2017)
- ensures sound management practices and regulatory compliance (ONN,2017)
- maximizes time and money by building on existing sector expertise (ONN,2017)
- supports innovation and experimentation for public benefit. New programs can be field tested and later if successful may lead to the establishment of a more formalized group or charity (ONN, 2017), and
- increases opportunities for equity and inclusion. Applying for grants and understanding all the complexities can be challenging. Shared platforms have been successful in supporting youth and local community innovators to learn about and work within the non-profit sector (ONN,2017).

### **Shared Platform Models**

As per Ontario Non-profit Network, Shared Platforms Case for Support, 2017, the shared platform approach is commonly used in three different circumstances:

1. *An internally generated project – the project evolves from organizational programming and work that needs to have its own identity.*
2. *An externally generated project- the project is developed outside the organization and “adopted” or “assumed” as a project within the hosting organization.*

3. *A community collaboration project- the project emerges from the host organization's work in the community and or as a collaboration within the sector.*

There appear to be several ways organizations can set up a shared platform. What follows are a few overarching models identified in the literature. However, given that SP's can be flexible in nature to accommodate the needs of groups or initiatives, there is potential to create a hybrid "made in the Bow Valley" Shared Platform.

**Shared Platform models identified include:**

1. **A larger, formalized non-profit provides a wide array of supports including, administrative, grant-making, strategic, fiscal, to less formalized groups and initiatives.** This enables these groups to spend more time focussing on their outcomes and less time on fund generation and administrative work.

**Example 1: Re-Think Green Shared Platform**

Re-Think Green uses its networks and infrastructure to support community-lead endeavours, focussed on building a sustainable Sudbury. Typical services for a shared platform project include: accounting, insurance, office space. It may also include staff time, access to equipment and mentorship. Each partnership is different depending on the needs of the project. The initiative being supported contributes to the operating costs of Re-Think Green, which is less costly to the project than operating independently.\* By working with Re-Think Green, the project may access funding that would not otherwise be available. The shared platform is an excellent way for Re-Think Green to leverage its existing assets to support community projects.

\*in this example and one other reviewed the contribution to operating costs was commonly 10% of grants awarded.

**Example 2: ACCESS**

ACCESS is a shared service non-profit cooperative designed to provide administrative back-office support for civil society organizations in Alberta and BC. ACCESS intends to use skilled "fractional staff" (freelance or contract workers who are able to work for multiple employers). This initiative is currently in the soft-launch phase of development and is focussed on offering legal, IT and bookkeeping services to a select group in order to refine service delivery. These services should be available to a larger group by March, 2022. When it is fully launched a broader array of services, including HR support, will be offered to non-profits on a fee for service (vs annual membership fee) basis. While the groups targeted at this point include: Alberta Community Co-operative Association (ACCA) and its primary partner organizations: Volunteer Alberta (VA), The Consortium, Econo Co-op and the

Association for Early Childhood Educators of Alberta (AECEA); there is an opportunity to inform further inclusions to this initiative.

### **Example 3: Centre for Social Innovation**

This organization was the incubator for the Ontario Non-profit Network (ONN). They provided insurance, bookkeeping, leadership, accounting, management and a board of directors. “This allowed the ONN leadership to figure out what worked (and what didn’t), build a strong foundation, and grow their network. After spending seven years at CSI they got to a place where they were able to incorporate” (Leung,2021). CSI has also recently built a shared space for Social Innovators called The Common Platform. It’s a hub for ideas, opportunities and events.

- 2. A larger, formalized non-profit provides support and expertise to small or fledgling groups.** This support can include administrative, strategic and educational. How this model differs from the first model is that the ultimate goal is to provide the tools to help these groups do the work themselves.

### **Example: Generator**

Generator (formerly Small Theatre Administrative Services (STAF): STAF (1992) was a Toronto based organization that provided subsidized administrative services to artists. These services included a shared grant writer, publicist, financial administration and general manager. In providing these services, administrative costs were reduced. It was a successful model, however over time it was perceived that a new shared platform that allowed organizations to own their means of production would be beneficial. The new shared platform created supports artists/groups to do the work themselves. Now called Generator, the organization provides high quality training for small groups of artists, collectives and organizations. Generator provides capacity building through professional development, leadership, community resources and dialogues. Some of the capacity building programs that have been provided include: Wordpress 101, crowdfunding, publicity 101, Excel, Info mgmt., Financial Literacy.

- 3. A hub organization (also known as a Charitable Venture Organization (CVO)) provides charitable status for projects/initiatives that closely align with their charitable purposes and mission.** CVO’s are considered to be a specific type of Shared Platform and as defined by Marsland, 2013, incorporate the key elements of a shared platform as well as the capacity to stimulate “new and innovative tools, structures, and databases to serve its project partners.” In the CVO model, once the CVO accepts a project, it becomes a program of the CVO. This requires the relinquishing of control by nonprofits involved in a project and as such requires a high level of trust and collaboration.

### **Example: MakeWay (formerly Tides Canada) Initiatives Model**



**Note:** The terminology can be confusing. MakeWay identifies themselves on their website as a shared platform NOT a Charitable Ventures Organization. However, Mason and Stevens, 2010, in their review of the organization defined it as a Charitable Ventures Organization. What tends to separate one from the other is that in a CVO the hub organization has charitable status.

MakeWay is a shared platform that hosts over 60 innovative social change projects in Canada. This platform builds solutions to a range of complex environmental and social challenges. Their partnerships are extensive and include community initiatives, foundations, indigenous organizations, philanthropists, government and diverse communities across the country.

MakeWay provides operational supports, governance, and charitable expertise for changemakers, allowing them to spend more time and money on achieving greater impact.

MakeWay also offers:

- Advisory services ranging from strategy and consulting through to management and implementation, for a wide range of partners.
- Donor advised funds that minimize charitable administration costs and maximise the impact and flexibility of funding for environmental, economic, and social justice.
- Strategic grant making programs that invest in community-led solutions to integrated environmental, social, and economic challenges in specific regions, like the North and the Pacific, or on specific issues like food sovereignty, Indigenous rights and authority, and healthy lands and waters.

A portion of MakeWay's administrative overhead cost is allocated to each project and each project must generate sufficient revenue to cover its expenses. Each project is unitized within Make Way. Short-term projects generally stay within the organization while longer term projects may develop sufficient capacity to transition to stand-alone entities separate from MakeWay.

Two other SP models were identified in the literature by Dart, Akingbola & Allen (2019):

- 4. Administrative Shared Platform (ASP)-** A number of non-profits "that would otherwise be small separate organizations, collectively delegate multiple organizational functions to a central administrative hub- often called a platform hub." This "hub" is able to create efficiencies of scale that no one non-profit would be able to achieve on its own. While not entirely different in outcome from SP model one, its origins are different in that it starts with the small non-profits organizing vs a larger entity. "Administrative efficiency occurs in the SP

through the scaling and specialization that comes by providing similar services such as HR, accounting/bookkeeping, grant administration.”

- 5. Community Development Shared Platform (CDSP)**-This structure primarily provides mentorship and development support to small, fledgling groups. The focus is more on capacity building, the projects are typically smaller and more often incorporate the voices of emerging community leaders, social innovators and practitioners “from the margins”. CDSP’s seems to evolve from ASP’s as the groups within the ASP begin to network and common goals and joint synergies emerge. New initiatives and unique partnerships may be created from this relationship building.

Of the models presented, the Charitable Venture Organization or hub organization appears to be emerging as the desired structure in order to drive systemic change. (Wheeler, 2015)

### **The Advantages of the Charitable Venture Organization or Hub Organization (from ONN, 2017)**

#### **Model 1: Development of a CVO**

- Effective in establishing a CVO that would incorporate most up to date CRA rulings related to charitable activity.
- Could develop charitable objects that would allow it to serve a wider array of initiatives.
- Ability to take a broader view of emerging challenges across a sector/even a national perspective.
- CVO could attract strong entrepreneurial leadership that could open up other options for additional types of earned revenue. E.g. US Fractured Atlas earns additional revenue by selling administrative service platforms, developing and selling IT support.

#### **Practical Issues:**

- Time to organize and find financial and HR resources to develop model.
- Start up costs- (\$60-80,000 for individual to lead, incorporation \$3,000, legal advice operating costs) Make Way- 2011 35 in house projects 17.7 mil)
- Could be viewed as competition.

#### **Model 2: Use of Currently Existing Organization**

To overcome the practical issues outlined in Model 1, an organization that has or could apply for charitable status could take on the role of CVO in collaboration with others to ensure and key initiative is actualized.

#### **Practical Issues:**

- Capacity of the organization to take on a broader role.
- Need to ensure this relationship follows CRA rules- could jeopardize CRA status of leading org
- Partnership challenges
- Donor confusion

**Advantage of this model:**

- Existing organization may have comprehensive knowledge of people and organizations working in the sector.
- Minimal start-up costs
- Tax receipt available
- Funders like collaboration

This type of relationship more often occurs on a short-term basis for a specific project.

**Keys to success of a Non-profit Shared Platform/CVO:**

- The group needs to come together to determine what will work best for them and satisfies requirements of charitable status and effective governance.
- Partners need to understand the model they are working within and be in agreement as to how it will work.
- It is essential that entities involved feel that they are equal partners in the enterprise.
- One size SP model does not fit all. It is scalable but size does matter. It is difficult to be an effective platform if too small. A small platform is also at higher risk in the event of a revenue drop.
- Participating entities must believe that a CVO exists for more than borrowing a charitable number in order to receive donations.
- Implementation of a CVO can present legal and regulatory challenges for the host organization. The risk, if not implemented properly is that the CRA can revoke charitable registration. The host organization must demonstrate through their policies and practices that they own and operate all projects and control all aspects of funding and performance related to the projects  
(Ontario Non-profit Network)

**Further CRA Considerations**

Other ways that a CVO (registered charity) can ensure that it maintains control of the activities carried out on its behalf include:

- the CVO (registered charity) that houses entities selects those without charitable status whose missions match or advance the charitable purposes of the CVO. This ensures the entity becomes a “qualified donee” as defined by the income tax act. The same would apply to any projects/initiatives undertaken. These initiatives must fit the purposes of the CVO.

- while a charity cannot act as a passive funding body for any other organization that is not a qualified donee, a charity can carry on its activities through staff (ie. volunteers, directors and employees) or through intermediaries. In this guidance, an intermediary is defined as a person or nonqualified donee that is separate from the charity but that the charity works with to carry out its own activities. (Stevens/Mason,2010)

Please Note: Bill S-222 (43-2) completed first reading in the House of Commons June 23, 2021. If passed, this Bill would amend the Income Tax Act to allow charities to provide their resources to those who are not qualified donees, provided they take reasonable steps to ensure those resources are used exclusively for a charitable purpose.

CRA “strongly recommends” that a charity put a written agreement in place when working through an intermediary. However, a charity must also be able to show that at all times, it is carrying out only its own activities through the intermediary and that it directs and controls the use of any resources that further these activities. For a charity to show that it is carrying on its own activities, it must be able to show the CRA the following:

- a clear, complete, and detailed description of the activity, as well as detailed information on how, when and where it is carried out;
- records demonstrating that clear, complete instructions and directions in relation to the activity are, or will be, provided to those who carry it on;
- records showing that it monitors and supervises the activity on an ongoing basis;
- documentary evidence that it deals with relevant issues related to the activity; and
- books and records that verify that the charity’s funds have been spent on its own activities (Marsland, 2013).

### **Conclusion**

The challenges of small non-profit and community groups are well-documented. The Shared Platform model has emerged as an opportunity to address concerns, particularly those related to efficiency and effectiveness. The shared platform model could ensure that wider systems change occurs as it enables groups to collaborate and provides a foundation from which to do their work. While several Shared Platform models have been presented in this discussion paper, these models allow for a hybrid approach that could work for specific group and/or community needs.

### **A Word About:**

#### **Nonprofit Amalgamations and Mergers**

While this paper is focussed upon the use of Shared Platforms to effectively bolster the work of non-profits and community groups, there may be occasion where an organizational amalgamation or merger could be the solution. While a controversial

subject, when organizations are doing similar work and are struggling for pieces of an already small pie, and when collaborations among these organizations are limited, amalgamation may make the effectiveness of undertakings and ultimately, the services and supports to the community that much stronger. Mergers and amalgamations can also decrease confusion around disjointed supports in a community and decrease donor confusion. Included in the Resources section of this discussion paper is a document prepared by MRU entitled: Merging for Good: A Case-Based Framework for Supporting Effective Non-profit Amalgamations by James Stauch and Cordelia Snowden

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## **APPENDIX 2: SOCIAL ENTERPRISES/SOCIAL VENTURES**

### **Social Enterprises Discussion Paper #2 January 17, 2022**

For readers' convenience, links to numerous resources are included in the text.

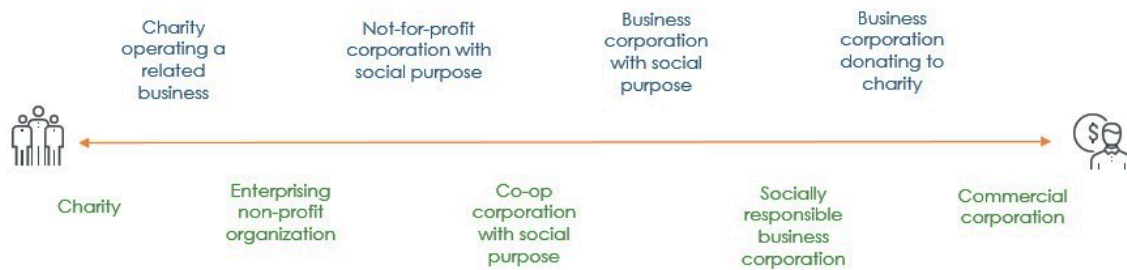
#### **Introduction**

The 2010 Canadian Task Force on Social Finance defined social enterprise (sometimes known as a social venture) as “any organization or business that uses market-oriented production and sale of goods and/or services to pursue a public benefit mission.” This definition shifted the emphasis onto the **impact** of the enterprise undertaken as opposed to the **ownership** of that venture. Social enterprises (SE's) can therefore cover a number of organizational “ownership” forms including charities, non-profits, cooperatives and for profits. However, Defourny and Nyssens (2008) argue that while some forms of social entrepreneurship may be found in the private for-profit sector and the public sector, in Europe social enterprises are found mainly within the third sector or the social economy and are hosted by “non-profit organizations as well as co-operatives and related not-for-profit private forms of enterprises”. This appears to often be the case in Canada as well, where the term social enterprise is used to describe a third sector undertaking and social venture/social entrepreneur are used to depict an initiative created by for profit entities.

A social enterprise is not a legal entity and is not included in the Canadian Income Tax Act. As a result, an SE can operate in the corporate form that is best suited to it. As depicted in the graph below, social enterprises can fall anywhere between a "charity operating a related business" to a "business corporation with social purpose."  
(Government of Canada, 2019)

[http://www.ic.gc.ca/eic/site/053.nsf/eng/h\\_00006.html](http://www.ic.gc.ca/eic/site/053.nsf/eng/h_00006.html) (Resources for selecting the best model for a specific enterprise are provided in the Resource section).

## SPECTRUM OF SOCIAL ENTERPRISES IN CANADA



Source: Adapted from *Spectrum of Organizations: From Charities to Traditional Businesses, Mobilizing Private Capital for Public Good*, Canadian Task Force on Social Finance (2010).

SE's seek to address more than one "bottom line". These include:

- Financial
- Cultural
- Social
- Environmental
- Training and employment

As social enterprises strive to achieve multiple bottom lines, there is an opportunity to create circular economies, "systems solution frameworks that tackle global challenges." <https://ellenmacarthurfoundation.org/topics/circular-economy-introduction/overview> Some SE's may contribute to a circular economy at a local level while other's such as InfintyBox in the SE examples section highlight the potential to have a much broader impact.

SE's are not new to the charity and non-profit world. There are numerous examples of enterprises that have been part of the landscape for many years, such as, "museums and art galleries operating gift shops as a way to generate revenue to support their exhibits and promote art or service; organizations such as the YMCA and YWCA using a fee-based program to support their charitable activities; and, thrift stores operated by non-profits in order to generate funds for their activities while also providing low-cost goods" (McKinnon, 2011). There appears to be a rapid growth in social enterprises recently, spurred on by diminished government funding, the need for organizations to fill gaps in the market or advance their missions and as a means for social innovation (McKinnon,2011).



**The benefits to a social enterprise are that they can:**

- Create training and employment opportunities
- Provide a needed good or service
- Decrease an organization's reliance on grants and government funding
- Allow organizations to control the services offered
- Further the organizations mission or mandate
- Increase organizational visibility
- Attract donors and investors

**Launching a social enterprise requires:**

- Long term commitment (it is not a short-term fix to financial woes)
- Strong leadership
- Sound business plan
- Adequate start-up funding
- Organizational support
- Consideration of the legal framework

**Financing a Social Enterprise**

In general, the sources of social enterprise financing include:

- Sale of goods and services
- Individual parent organizations
- Foundations
- Government grants and contributions
- Philanthropy (individual donors)
- Tech Assistant grants
- Cooperative sector
- Community banks, credit unions, charity banks
- Community economic development and Community Futures Development Corporations
- Corporate sponsorships

Increasingly, financial intermediaries are emerging e.g. Community Forward Fund, Social Venture Partners and Futures Development Corporations (McKinnon 2011.)

**Funding Sources for Local Social Enterprises**

**Government of Canada**

**Social Innovation (SI) and Social Finance (SF)**

Social innovation refers to a response to a social or environmental problem, which, once adopted, results in better solutions than existing approaches. Social innovation can include:

- new, more effective social programs
- the use of new technologies
- the growth of social enterprises

Social enterprises are businesses that pursue a social or environmental mission. Social finance is the practice of making investments intended to create social or environmental impact in addition to financial returns. Social finance is a tool that seeks to mobilize private capital for the public good. Examples of social finance investments include:

- acting as a guarantor (co-signing a loan agreement) to allow a non-profit to secure a mortgage to finance a building to house social entrepreneurs
- a loan to a charity in the employment sector to expand its business and hire more people living in poverty
- an equity investment (purchasing shares) in a food services cooperative to open a new location and reach more customers
- an equity investment in a company to develop software that helps more people graduate from school

There are 3 foundational elements to the SI/SF Strategy: the Investment Readiness Program, the Social Finance Fund, and the Social Innovation Advisory Council. The Government of Canada announced these initiatives in response to the recommendations of the SI/SF Strategy Co-Creation Steering Group.

<https://www.canada.ca/en/employment-social-development/programs/social-innovation-social-finance.html>

### **The Investment Readiness Program (IRP)**

The Investment Readiness Program supports social purpose organizations as they contribute to solving pressing social, cultural and environmental challenges across Canada.

Its goal is to help social purpose organizations build their capacity to participate in Canada's growing social finance market and prepare for the Government of Canada's broader investment in social finance via the Social Finance Fund.

Community Foundations of Canada serves as one of the IRP's national funding intermediaries alongside the National Association of Friendship Centres, Chantier de l'économie sociale, the National Aboriginal Capital Corporations Association (NACCA), and the Canadian Women's Foundation (CWF). CFC is collaborating with regional partners across the country to award IRP funding.

The goal of the IRP is to strengthen the SI/SF ecosystem. It will support SPOs to build their capacity to access social finance. The program will expand support to organizations led by or serving equity-deserving groups, such as (among others):

- women
- Indigenous peoples
- low-income people
- Black Canadians and other racialized peoples
- people with disabilities

- members of the LGBTQ2+ community
- official language minority communities
- recent immigrants and refugees

The IRP supports the Government of Canada’s goal to increase inclusion and opportunities for participation of Canadians in their communities.

<https://communityfoundations.ca/initiatives/the-investment-readiness-fund/>

### **Social Finance Fund**

The Social Finance Fund (SFF) is an initiative that seeks to accelerate the growth of Canada’s social finance market.

The Department of Employment and Social Development Canada (ESDC) will provide repayable contributions to a small number of investment managers known as wholesalers. The SFF will also provide a smaller portion of non-repayable funds for activities that support the wholesalers’ use of repayable funds and the SFF’s goals. Wholesalers will invest in existing or emerging social finance intermediaries, such as credit unions, community loan funds, and private equity firms. Social finance intermediaries will then invest in a range of diverse social purpose organizations (SPOs). Types of investments may include, loans, equity investments, or acting as a guarantor (co-signing a loan agreement).

### **Social Innovation Advisory Council**

The Social Innovation Advisory Council (SIAC) is a ministerial advisory group of 15 members, of leaders, practitioners, and experts from across the not-for-profit and private sectors. The SIAC will provide strategic advice and subject matter expertise to support the implementation of the SI/SF Strategy.

### **The Social Enterprise Fund (SEF)**

The SEF offers patient debt financing to those working to deliver public benefit missions across Alberta. Any organization, be it a non-profit or for-profit is eligible to apply. Since its launch in 2008, by the City of Edmonton and the Edmonton Community Foundation, SEF has provided loans to more than 40 organizations. These loans are for a range of initiatives from improving access to locally produced food to cleaning the environment. And, from building affordable housing to creating jobs for at-risk youth. Many loans have been paid-in-full, with the capital recycled into new investments.

<https://socialenterprisefund.ca/how-to-apply/>

### **Trico Foundation**

Trico Foundation offers grants to Alberta based charitable organizations that engage in social entrepreneurship. Trico defines social entrepreneurship as: “using business models (the sale of a product or service) to address a “gap in society” (i.e. an imbalance of power consistently marginalizing one group or individual so as to cause exclusion, suffering, or dehumanization. For example, economic exclusion/poverty, social

exclusion, challenges to good health or well-being, children and/or youth at risk, or the aged/seniors at risk).”

The funding has been designed to support organizations that feel they know what they need to learn next in their social enterprise journey and have identified that they need funding to take that next step. Next steps may include: undertaking experiments, tests or social R&D to name a few.

<https://tricofoundation.ca/a-s-e-s-s-funding/>

### **National Social Value Fund (Calgary Office)**

The National Social Value Fund (NSVF) provides an experiential learning program that connects students and organizations passionate about impact investing.

NSVF supports student-led Social Value Funds across Canada that make impact-first investments addressing local issues in their respective communities.

The local Social Value Fund teams identify financing gaps in their community and provide capital to social enterprises, enterprising non-profits, co-ops, and other socially-focused organizations that are under-served by the current impact investing market.

<https://nsvf.ca/>

NB: While this is a Calgary specific fund, it is valuable to note what they fund in the area of SE's and it may be worth determining if their boundaries extend beyond city limits.

### **UCeed- Social Impact Fund**

Activated by Innovate Calgary, the university's knowledge transfer and business incubator, UCeed is a philanthropically powered early-stage investment program that accelerates UCalgary and community-based start-up companies to advance problem-solving research, create jobs and fuel the economy. The Social Impact Fund awards \$30,000 to \$300,000. Criteria include:

- social enterprises including, non-profits, for-profit, charities, and cooperatives with demonstrable community benefit commercializing evidence-based solutions to issues.
- priority will be given to opportunities that address pressing local and international issues.
- must be incorporated prior to receipt of funds.
- must have demonstrable impact or operations in Alberta.
- minimum one (1) full-time employee within six (6) months of UCeed investment.
- ability to report on impact measures within six (6) months of UCeed investment.

The Impact Management Project and Common Approach are helpful resources to begin learning. <https://ucalgary.ca/uceed/funds-and-programs/social-impact>

### **Alberta Capital and Financing Supports for Entrepreneurs**

This site provides a variety of funding options available to social entrepreneurs.

<https://www.alberta.ca/capital-financing-supports-entrepreneurs.aspx>

## **Social Enterprise/Social Venture Examples**

Social enterprises span a broad range of offerings as will be in evidence by the examples selected below. It was noted while doing research for this paper that increasingly, online platforms are being effectively utilized for sales and service activities.

Some of the broad categories of social enterprises identified included:

- Clothing- design of sustainable clothing, sale of second- hand clothing, clothing libraries
- Artisan products- design of platforms for underserved artist to sell their products, shops for sale of items, sales at market.
- Food services- catering, bistro's, bakeries (food services were often linked to support of new skill acquisition and employment opportunities for underserved populations), farmers markets, creation of food markets that sell food to low-income communities provided affordably by food suppliers and grocery stores. Online marketplaces for sale of social impact products.
- Sale of newly created products- this category included but was not limited to; teas, pancake mix, baby food, herbs, cleaning products, new technology (eg camera clips), containers for cannabis.
- Other services- the sale or rent of exercise equipment or outdoor sport equipment. rental of facilities to other non-profits or for profit events, rental of garden spaces, smartphone repair.

### **The Whistler Models**

Whistler, BC and surrounding communities have similarities to the communities of the Bow Valley. Specifically, they both have tourist -based economies, a significant transient population and an overall high cost of living. Whistlers' non-profit's have been innovative in addressing some of the gaps in available supports and services, as well as in the encouragement of social enterprise. What follows are examples of the initiatives that have been undertaken that could be instructional to the communities of the Bow Valley.

### **Whistler Centre for Sustainability -Engagement+ Planning (WCS)**

The mission of WCS is "to inspire effective conversations and planning for a better world." The Whistler Centre for Sustainability Institute Society is WCS's registered charity which focuses on honoring indigenous peoples, growing local entrepreneurship, advancing a more sustainable food system, strengthening resilience through neighbourhood connections, and supporting climate action. They do this by hosting learning events, supporting non-profit planning processes, and facilitating strategic conversations that ultimately lead to better collaboration, clarity and shared direction.

From 2015-2017 the WCS hosted The Social Venture Challenge. The challenge was created to “encourage, support and grow social ventures in Whistler, Pemberton, Squamish and Lillooet by providing capacity building, mentorship, and business development learning opportunities to non-profit organizations, businesses and entrepreneurs to develop their business concept. Once the concept was fully formed, a “Dragon’s Den” type event was hosted, where social entrepreneurs could pitch their innovative ideas for making a difference in their community. Links to all competitor’s entries are included in the resources section below. The examples highlighted were selected as they demonstrate unique opportunities and potential relevancy within the context of the Bow Valley.

NOTE: While most initiatives launched in some format, when checked online, several appear to no longer be in existence.

- **Cutting Barriers** Inadequate income, employment and education are well documented as causes of and contributing factors to people cycling in and out of homelessness. Disadvantaged members of the community face a variety of challenges to entering the labor market. Cutting Barriers is an employment and training agency offering skills-based training workshops and job placement services specializing in the kitchen/food service industry. The training can assist individuals to identify career goals, access hands-on work experience, connect with local employers, and create a barrier-free pathway to earn sufficient income to make the transition into independent living and community contribution. These placement services could significantly help the community by giving local businesses the confidence to hire from a pool of trained staff who help to address local labor shortages.
- **Dooshi Pet Supplies** creates sushi for pets. Their all-natural pet food and treats are made from wild salmon and organic, GMO free fruit and vegetable pulp. Dooshi pet food is made using recycled restaurant waste. The concept for Dooshi was inspired by a lack of nutritious pet food and the waste of usable food waste. Dooshi’s mission is to use top quality ingredients to help maintain and improve a dogs’ longevity.
- **Sea to Sky Relocations** The intent of this service is to fill a gap in the supports available to retirees and seniors. Working with retirees and seniors in the Sea to Sky Corridor to enable them to ‘age in place’. Services planned include: help with downsizing, renovating and facilitating the ability to stay at home safely, or to relocate to a family or care home, in an environmentally responsible manner.
- **Rainwater Harvesting Solutions with TBI Irrigation** Their mission is to educate and motivate homeowners, builders and developers in the Sea to Sky Corridor on the power of capturing, storing and utilizing water. This has been proven to naturally encourage a culture of water conservation. Studies have shown that

when individuals take responsibility for the harvesting of their own water, the human connection with water is recreated and wastage is reduced significantly.

- **The Seed Box** promotes an edible garden in a box to get people growing. Each Seed Box would contain seasonal vegetable seeds, peat pellets, instructions on how to grow them and other gardening tools. Online we tutorials, ideas and tips would be provided to successfully grow vegetables.
- **Gear Share Hub** is a peer-to-peer online outdoor gear rental website aimed at building connections, reducing consumption, supporting local economies and promoting outdoor activities.
- **The Freed Food Society** is a non-profit based in Whistler whose plans included saving edible goods that were going to be discarded and upcycle them into canned products such as jam or pickles and meals. These could be sold at the local market.

### **Indigenous Tourism Start-up Program**

The Indigenous Tourism Start-up Program (ITSP) was a program launched by the Squamish Lil'wat Cultural Centre (SLCC) and the Whistler Centre for Sustainability (WCS). This program focussed on the development of an Indigenous tourism business concept and the development of a business plan. The demand for First Nations-based tourism has grown in recent years, with the Indigenous Tourism Association of Canada reporting in 2018 that 37 per cent of visitors to Canada are interested in Indigenous tourism experiences.

The Business Model Canvas was used as a template for identifying a clear value proposition, customer market, cash flow and revenue streams, and then developing a full business plan. The goals were to encourage and inspire new Indigenous tourism entrepreneurs, to build capacity pertaining to business planning, financial literacy, marketing and more, and to increase jobs and employment.

The program included four two-day interactive and cohort-based classroom sessions, one-on-one mentorship, guest speakers, on-line learning, and mentor support, and took place from September to November 2019, with the final pitch event in November. Barriers to participation were removed by offering funds for transportation and lodging and providing a per diem.

The three-month program saw 10 entrepreneurs from as far away as Saskatchewan cultivate their tourism-related concept in four two-day sessions, which taught everything from business planning to financial literacy, marketing, branding and other related skills. The winning (\$5,000 prize) concept was a traditional barrel sauna

rental. This project tapped into local First Nations' artists to decorate the saunas with Indigenous murals, and the business intended to feature other Indigenous artisans' wellness products and practices.

The learning from this program as shared in conversation with Cheeying Ho, Executive Director of The Whistler Centre, was that participants required more support than was initially allocated. One to one support would have helped with navigating the Business Model Canvas and the required templates e.g. cashflow, that were challenging for some.

### **Whistler Community Social Services Society: The Re-Use-It Centre, Re-Build-It Centre and Re-Love-It Online Store, Whistler, BC**

Whistler Community Services Society (WCSS) is a non-profit with charitable status that has supported the communities' social health and wellness since 1989. WCSS supports over 20 programs and services in Whistler including the Food Bank, Outreach Services and Connect Whistler.

During its inception, community leaders saw an opportunity to create a social enterprise to fund programs that respond to community need. The Re-Use-It Centre was opened in 2000 and has become an "economic engine" supporting a range of social programs and services while diverting over a tonne from the landfill every day. Given the transient nature of the community, there is always a population looking for affordable ways to furnish an apartment, gear up for the season or find a source for weather suitable attire. When people leave the community, they often donate items back to the Centre.

Based on the success of the Re-Use-It Centre, the Re-Build-It Centre was added a few years later. This Centre offers used large items (furniture, appliances, art, rugs) and building supplies, paints, sinks, toilets, tools and a host of other items for home renovation projects.

Recognizing the growing trend for second-hand fashion, WCSS has recently added the Re-Love-It Online Store. Many of the clothing donations dropped at the Re-Use-It have tags on, were designer labels, had vintage cachet or had one-of-a-kind appeal. These in demand items are now available exclusively online. With the inclusion of an online store, the program promotes accessibility to people who are not comfortable shopping in person for a number of reasons and it offers a platform to sell their goods in a digitized format in case of future service disruption. The organization projects the new store will generate additional funds to support an increased demand for its social programs.

### **Other Second- Hand Clothing Examples**

According to the ThredUp 2020 Resale Report, the second- hand clothing market is projected to double in the next five years and to be two times greater than "fast fashion" by 2030. This rate of growth is fuelled in part by the shopping preferences of



Gen Z and Millennials (40% of the global population), and by a new pandemic habit of “thrifting” that is expected to continue.

The second-hand clothing market can meet a triple bottom line: it can support a non-profit organization while keeping garments out of landfills, displacing carbon needed to make new clothes, and saves consumers money.

New digital platforms are supporting the recent boom. Platforms such as: Tradesy and Poshmark support peer to peer selling while The RealReal and Vestiaire Collective sell second-hand luxury items.

While there are a wide range of Second-Hand initiatives, a few unique models are highlighted below.

- ***The Clothes Library***

Perera and Albinsson (2012) suggest that the aim of clothing libraries are to encourage consumers to re-examine their consumption. This model favours access as opposed to ownership. Unlike second-hand stores, clothing libraries share goods using minimal set fees and time periods, rather than transfer of ownership.

- ***Fresh Fashion Library-Toronto***

Fresh Fashion Library founders were inspired to create a locally sourced fashion rental service. This project evolved from a partnership with the Centre for Social Innovation. For a basic membership (\$30 per month) three items could be checked out at any given time. Members could also lend their clothing items and with each piece accepted there is a certain dollar credit provided each month. At their peak, they had 300 memberships and were circulating 3,000 items. Due to Covid, Fresh Fashion became an online second-hand clothing sales platform.

- ***LENA Library- Amsterdam***

Similar in structure to the Fresh Fashion Library, LENA also use their enterprise as an opportunity to raise awareness of the negative effects of “consumerism, such as child labour, worker exploitation and the ever-increasing mountains of textile waste that accumulate in dumps each year.”

Clothes are also available for sale at LENA. An item that has been borrowed can be purchased with a 10% discount on its original price.

- ***Clothes for Re-Sale***

TutumluAnne is Turkey’s largest children clothing resale marketplace. The platform, which receives 1.3 million monthly visits in average. Besides being a sustainable consumption alternative and offering a second life to children’s clothes, it allows families to make some extra money selling garments they no longer use. The company is

currently upgrading its payment and shipping options as well as its product quality screening procedures, to ensure that all items are in good condition before they are posted online, and on improving its buyer and seller recommendation system.

### **Other Unique Social Enterprises**

With so many to choose from, what follows are a few examples of what is possible and the multiple “bottom lines” that can be achieved through a social enterprise.

- ***Canmore Together***

This is a new social enterprise that aims to bring community members and socially & environmentally minded local business owners together to find innovative ways to spark connections, collaborate & build strong relationships. The intent is to establish mutually beneficial partnerships, ultimately helping the local economy thrive through a complementary community currency: TOGETHER\$

<http://www.canmoretogether.com/>

- ***Eva’s Print Shop- Toronto***

Dedicated to the memory of immigrant, outreach worker and Toronto community leader Eva Maud Smith, the non-profit Eva’s has provided housing, counselling, employment training and other programs for homeless youth since 1994. Eva’s Print Shop, which offers the full range of print and graphic design services, generates sustainable funding for Eva’s programs. The youth employed there get training to work in the print and design sector. Over 70 per cent of youth trained at Eva’s Print Shop are launched from poverty and homelessness into full-time careers.

- ***Skwachays Lodge- Vancouver***

Owned and operated by the Vancouver Native Housing Society, this space includes: 18 boutique hotel units (indigenous artists created a vision for 3 rooms each), a street level gallery, rooftop sweat lodge and smudge room, studio/workshop production space and a commercial kitchen. It also supports an urban indigenous artist in residence program.

- ***Olio- UK***

Olio has created an app which connects neighbours with each other and to local shops so that surplus food and other items can be redistributed rather than thrown away.

- ***Madlug -UK***

With every piece of luggage purchased, one is given to a child in care to transport their belongings.

- ***Cycle Salvation- Ottawa***

Cycle Salvation is a social enterprise operating under the umbrella of Causeway Work Centre. The business strives to achieve a triple bottom line (people, profit, planet) by providing training and employment in the field of bike mechanics to people who are economically disadvantaged, while at the same time diverting bikes destined for scrap and landfill sites.

- ***Eco-Works- Lower Mainland, BC***

Provides training and employment for youth in landscaping, grounds maintenance and design. Use environmentally supported practices and use funds from business to support other community projects.

- ***Candy Shop- Courtenay, BC***

A candy shop that had long been a part of the fabric of the community was at risk of closing. The owners wanted to retire, had no successor lined up, and were looking to sell but weren't finding a buyer who felt quite right. The local community futures office, an organization that provides support to local businesses, saw an opportunity. They could save a business that was a longstanding institution in the community, generate revenue for themselves, and work toward one of the office's economic development goals: to boost the economic inclusion of people with disabilities. They bought the business, and then immediately started implementing an employment plan where they prioritized hiring and training of people with disabilities.

- ***InfinityBox (India)***

Infinity box fights the mounting crisis caused by disposable, single-use packaging and the increase in food delivery services. The organization sustainably manufactures traceable, high-quality and resistant-to-leakage food containers, which are reused safely through their digital tracking platform (QR code) and patent-pending smart bins. Bins can be reused up to 100 times. They are currently working with some of India's largest food delivery companies.

## **A Word about the Co-operative Model of Social Enterprise**

Literature exists that outlines the commonalities of cooperative and social enterprise models but views them as separate entities. For purposes of highlighting how a cooperative social enterprise could work in the context of the Bow Valley, a focus on the literature identifying cooperatives as a model of SE, and that view coops as one of the "original Canadian SE models", has been undertaken.

Co-operatives bring people together to meet a common need e.g. economic, social, cultural or environmental. They often aim to fill a void within a community or to seize upon a local opportunity. As with all social enterprises, they focus on a triple bottom line of "people, planet and profits". Co-ops operate in urban and rural settings and span

every sector of the economy including; retail, housing, agriculture, social services, renewable energy, financial and health.

The benefits of a co-operative are that:

- They are democratic in nature. A coop is owned by its' members and each member has one vote, regardless of how much they have invested. As a result, stakeholders have a vested interest and may be more committed to the enterprise.
- Coops are not profit driven but desire to meet the interests and needs of both members and the wider community. They bring a lens of fairness and equity to the undertaking as they are open to everyone regardless of socioeconomic status.
- Co-ops help people improve access to and the affordability of goods and services e.g housing, employment, food.
- They create local employment opportunities.
- Risk is lowered in a coop through the election of a board of directors that is directly accountable to its' members and the weight of the vote is the same no matter how much is invested.
- Coops are typically community or regionally based and as such investments and surplus revenue remain locally (BC Coop 2022).

Challenges to Cooperatives are:

- That good communication is essential to their success. Issues can occur when there are conflicts of interest among group members.
- It requires all members to be comfortable with equal voting rights, regardless of investment.
- All members must share equally in the work required for the business to succeed. This does not always occur.
- Co-ops often have limited access to capital because they are restricted to members' capacity to invest in the business or the availability of loans on the financial market (Kesebi, 2009).

Given the breadth and depth of co-operatives, what follows are but a few examples of the types that currently exist:

- **Housing Co-ops** currently provide secure and affordable housing (both rental and for purchase) to more than a quarter million people in Canada. As a member of a housing co-op, there is the opportunity to have a say in the decisions that directly affect them.
- **Sharing and Platform co-ops** while this could involve the sharing of tools and resources, perhaps the most well-known are car share programs that can provide affordable transportation and reduce carbon emissions. "One carshare vehicle can take as many as 13 cars off the road and reduce carbon emissions by 33% (Peg City Car Co-op). There are many examples of what are commonly

referred to as “platform” coops that use technology to help people share equipment, tools, and other resources.

- **Bike co-ops** provide a workshop space with tools, equipment and instruction on bicycle repair and maintenance, education about biking and safety, and organize fun events to celebrate the culture of cycling and to engage people in healthy outdoor activities. Many also rent bikes and/or donate them to people in need.
- **Renewable Energy Co-ops** include wind, solar and other alternatives to fossil fuel. A group of citizens get together to pool their resources to establish these co-ops in order to reduce their carbon footprint, save money, and have a source of clean reliable energy for their community.
- **Social co-ops** are often, but not always, nonprofits. Social co-ops provide services to help address issues ranging from health care and homelessness to community economic development. Common examples are child care co-ops or those that support those with intellectual disabilities and their families.
- **Multi-stakeholder/Solidarity Coops** are a type of co-op that offers different types of membership. For example, it could have workers, community organizations, and even funders who all have a seat at the table and work together to meet common needs. In Europe and Canada, multi-stakeholder co-ops are typically formed to pursue primarily social objectives particularly in the areas of healthcare and social services. In the U.S., sustainable food systems have been an area of interest for multi-stakeholder cooperative activity. In Quebec, this form of cooperative is increasingly gaining traction. (Co-operative Development Centre at Kent State University)
- **Financial co-operatives** are owned by their members who share in the profits and keep money circulating in the local economy. They provide financial services to their members including, banking, loans and insurance. The Creston and District Community Investment Coop directs new or pre-existing investment capital from area residents into local ventures with community impact. This coop provides short-term capital to businesses looking to launch or expand and assists these ventures in establishing “a supportive customer base” and sustainable operations for their concept.
- **Small business co-operatives** appear to be increasing in prevalence as business owners without succession plans but with a desire to sell, look at opportunities. These cooperative ventures ensure that a needed service remains in the community and decreases the risks involved for any one purchaser (Cooperative Enterprise Council of New Brunswick 2022).

## A Word about Venture Philanthropy

Although the concept of Venture Philanthropy has been around for many years in the US, it has yet to reach its full potential in Canada. Rather than providing cash grants to charities, non-profit’s and social enterprises, venture philanthropy invests in their

business structure to help them grow and function more efficiently. This is a long-term relationship that aims to ensure the organization maximizes its social impact.

While models may differ, in general, venture philanthropists select organizations with unrealized growth potential, work closely with the organization to develop a strategic plan and then provide access to the financial and non-financial support they need to implement the plan. This is a model that could be extremely beneficial to Bow Valley non-profit organizations interested in developing social enterprise or enhancing their community impact.

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## **APPENDIX 3: DONOR COLLABORATIONS**

### **Donor Collaborations Discussion Paper #3 January 28, 2022**

For readers' convenience, links to numerous resources are included in the text.

A Donor Collaborative is broadly defined as “a group of funders who work together to maximize their impact” (Inside Philanthropy, Learning Centre 2022). All size of funder can be represented in a collaborative from individual donors (affinity groups and giving circles) to collaboratives that represent funding bodies both large and small, including individual donors. Donor collaborations fall along a continuum. At one end are loose alliances of funders who exchange ideas and raise awareness of issues and concerns; funders typically retain control over their investment decisions. In the middle are collaboratives that develop an informal strategic alignment, working together to explore a common challenge; they may align some of their grant-making through shared strategies. At the other, end more formalized processes exist; separate donors come together in a new structure “to pool their resources and make collective re-granting decisions” (Innes, 2018) .

There can be movement along this continuum as participants in a collaborative become more comfortable with one another and identify areas of common concern. What begins as an opportunity to share information, may evolve into a joint funding venture. The Funders Forum Collaborative established in 1997, hosted by The Community Foundation of Muncie and Delaware County Inc., is a good example of this evolution. Initially it offered a vehicle for funders to discuss community issues and hear from non-profit organizations about their programs and services. This collaborative now engages in joint grant making and as a result has become more responsive to community needs as they arise. Their goal is to “pool knowledge, experiences and resources to make a collective impact.”

Regardless of the chosen model, there are distinct advantages to collaboratives. The key societal benefit is that collaboratives have the potential to achieve greater impact and systems level change as a result of the power of collective ideas, strategic thinking and pooled resources. Other advantages include:



- Increased learning opportunities for collaborative members who may have an affinity for a subject area or issue but require more information.
- Increased public awareness of an issue- there is a greater impact when multiple voices speak as one.
- Shared risk-taking when involved in funding a new venture.
- The collaborative can act as a springboard for the development of new partnerships and initiatives.

The most common challenge and, the key to creating a successful collaborative is TIME. Relationship building in order to develop trust, create a common purpose, identify roles, outline procedures and reach consensus on issues all require time. Another challenge can be the perceived loss of donor autonomy and recognition (The Philanthropic Initiative, 2009). However, being part of a collaborative does not preclude individual grant making activities by donors, it is most often in addition to these.

**Elements to building a successful collaboration include:**

- Having a champion who is passionate about an issue and can recruit others to the cause. The champion may be an individual donor, a small group or a Foundation that instigates the collaborative and invites others sharing this interest to come together for initial conversation.
- The identification of a unique opportunity; this is often the result of a crisis or a call to action when the status quo is no longer working.
- An inclusive participation structure that encourages the involvement of a diverse group of funders.
- A forum environment that builds trust, supports interactivity and enables participants to learn from one another.
- An evaluation system that is designed to allow for real time reporting of initiative undertakings and the flexibility to adjust strategies based on initial results.
- Having a long-term view, including a long-term commitment of members and an agenda that takes into consideration that real change takes time and consistent funding over time (The Philanthropic Initiative, 2009; Panorama, 2019).

**Examples of Collaboratives**

The selected examples illustrate the collaborative continuum. The collaboratives highlighted below begin at the information gathering/sharing end of the continuum and move to more complex structures, first those groups who focus on a specific issue and draw funders to the table (Health and Housing Funders Forum and Blue Sky Funders forum), and finally to one of the more complex and formalized structures exemplified by the Collaborative Funders Table.

**Giving Circles**

Giving circles gather individual funders to discuss values and issues in a community. They pool their dollars and collectively decide where funding will go. They often engage beyond dollars to give time and talent. Members typically have deep ties to the community they're serving and are able to move money faster as a collective than traditional philanthropy. In the US, 1.3 billion dollars has been given via giving circles in the past 2 decades. Over time, more diverse voices have become included and an increase in men, youth and people of color are represented (Lomelin, Jovanovich & Voss 2022) .

### **Giving Circle Example**

#### **Sage Society Women's Fund of Central Indiana Community Foundation**

Donors who annually contribute \$500 or more to this fund are invited to take part in site visits, panel discussions and community conversations. It is an opportunity to get to know other like-minded people. This group is able to provide seed funding and support grassroots initiatives which are often invisible to larger funders.

<https://wfcisquarespace.com/giving-levels/>

#### **Philanthropy Together- Launch Pad for You (A Giving Circle Resource)**

This US based resource trains community leaders to initiate giving circles. There are 5 weekly sessions. Since it started in June 2020 it has trained 250 leaders; 79% women and 54% people of colour. 90% of Launch Pad giving circles initiated are concentrated on racial equity and social justice work. There has been an increase in national and regional level circles united by cause.

<https://philanthropytogether.org/programs-resources/start-a-giving-circle-launchpad/>

### **Funder Affinity Groups**

These groups come together as a result of a shared interest. It is an opportunity for funders (individuals to foundations), to interact and collaborate to have an impact. Giving circles are an example of an affinity group, however these groups can be much more formal in structure, engaging in strategic advocacy, advising funders and publishing research. (Inside Philanthropy Explainer)

<https://www.insidephilanthropy.com/learn>

#### **Example of Affinity Group: 1% for the Planet**

This is a unique affinity group model. It is a global initiative that aims to address urgent environmental issues. Through annual memberships, businesses and individuals are able to support environmental solutions that align with their values. 1% for the Planet advises on giving strategy and pairs funders with environmental nonprofits. It "amplifies the impact of their network". <https://www.onepercentfortheplanet.org/model>

### **Funders Forums**

In general terms, Funders Forums provide an opportunity for those who provide grant funding to gather together. The gatherings are typically a means to enhancing

connections and fund distribution however, communities and regions enact these gatherings in ways that are tailored to meet the needs in their area and the desired outcomes of the funders.

Hawkes Bay and Northern Ireland Funders Forums illustrate funding collaboratives that are not specific to one issue and joint funding of initiatives while a possibility, may not be the outcome of these meetings.

### **Funders Forum of Northern Ireland**

The objectives of this forum are to:

- Promote good and effective funding practices and share insights and learning.
- Share information on funding policy/protocols.
- Provide opportunities to discuss issues with other funders, key stakeholders and the organizations they fund.
- Allow funders to collaborate and network with each other.

The aim of this forum is to provide a confidential space to network, share info and encourage collaboration thereby promoting philanthropic giving across the region.

<https://fundersforumni.org/>

### **Hawkes Bay Funders Forum- NZ- Established in 2007**

The intentions of the Forum are to:

- Increase trust, communication and knowledge sharing opportunities.
- Discuss developments in the sector at strategic and operational levels.
- Discuss significant community projects enabling forum members (individually or jointly) to collaboratively initiate or contribute to projects where appropriate.
- Allow forum participants to identify and discuss key regional issues, trends and opportunities.
- Keep abreast of relevant policy and changes to policy for individual funders.

This Forum is comprised of funding organizations that support charitable organizations who work within and strengthen community. There is no collective fund rather, the group shares updates on their individual funds, including which funds are open and what their priorities are. This information can then be “passed on to individual groups and to the public to give them the best chance of applying to the correct fund for their project” (Interview with Community Grants and Partnership Advisor). The forum organizes a “funding roadshow” across the region to inform the public of available funds. They have worked on a few collaborative projects where funding has been provided from different organisations to achieve an overall goal.

<https://www.hbrc.govt.nz/our-council/about-council/partnerships/funders-forum/>

The following two examples illustrate Funders Forums that target a specific area of concern.

### **Health and Housing Funders Forum- 2002**

This Forum fosters collaboration among philanthropic organizations to make a significant impact in the areas of healthy housing and healthy communities. They seek to re-envision housing so that it leads to better health for vulnerable populations. Other goals include:

- Creating a multidisciplinary ripple effect in areas such as health equity, sustainability, housing, community development and public health.
- Offering a range of opportunities, tools and resources e.g. webinars, peer networking, conferences to funders.
- Aligning philanthropic funding plans and priorities to maximize funding.
- Promoting systems level change and action across sectors.

The aim of this forum is that funders become ambassadors in their sphere of influence <https://nchh.org/build-the-movement/funders-forum/>

### **Blue Sky Funders Forum US – a Working Group of the Environmental Grantmakers Association**

This collaborative exists to inspire and increase philanthropic investments and create a community of funders who support equitable access to meaningful outdoor experiences and connections to nature. To achieve this, the BlueSky Funders Forum engages and convenes funders to showcase successful program strategies and innovative partnerships to enrich and inform members grant making.

<https://blueskyfundersforum.org/>

### **Funding Collaboratives**

The following example is of a funding collaborative that goes beyond information sharing and coordinated investment to create a structure “where participants contribute resources, expertise and reputation and share both the risks and the results” (Innes, 2018) .

### **Collaborative Funders Table- Calgary, AB**

The issue that had been explored for many years was how to support out-of-school programming for vulnerable youth. In early 2014, a funder and the City of Calgary convened to discuss the idea further. Following that discussion, the funder took the lead to bring other funders together to explore the issue more fully and identify the means to move it to action.

During the first 6 months the City, the United Way and Burns Memorial Fund, with the support of developmental evaluators, prepared a preliminary investment framework describing the purpose, potential target groups, anticipated outcomes and possible roles and principles for collaborative funding. This framework helped to draw new funders to the table.

Once there was a commitment to pooled funding and collaborative grant-making the Funders Table developed a process for grant-making. Over the next 3 years the partners pooled and disbursed \$720,000 to fund unique programs. It is interesting to note that at one point in the partnership the United Way was unable to contribute for a year. The Calgary Foundation seamlessly stepped in (a less risky venture when there is evidence of program success), with the United Way remaining at the table. The original funder was then able to provide funds for the follow up project. When the three-year project was completed, all original partners agreed to remain at the table and support the design and piloting of a program that engaged employers, youth serving agencies and youth to increase employment among vulnerable youth.

Some of the challenges identified with this undertaking were; that insufficient resources were set aside to evaluate the program; there was a lack of clarity as to who was responsible for site visits and program oversight; interest waned over time; funding levels may have been too low initially; and that the withdrawal of funding after 3 years could potentially put programs at risk. Strategies were created to address this risk, including connections to other possible funding sources.

The learnings from this collaborative reinforced the value of having a champion. It was the initial funder that drew others to the table. It also highlighted the importance of creating an explicit collective vision, ensuring there is back bone support (in this case a City of Calgary Community Development worker, an evaluator and administrative/grants management support from the Burns Memorial Fund). Finally, it demonstrated that built relationships among funders can generate further opportunity (Innes, 2018). [https://burnsfund.com/wp-content/uploads/2018/06/Collaborative-Funding\\_A-Learning-Brief\\_June-2018.pdf](https://burnsfund.com/wp-content/uploads/2018/06/Collaborative-Funding_A-Learning-Brief_June-2018.pdf)

### **A Word About Funder Best Practices**

The topic of this paper, funder collaboration, has been highlighted in several publications as a grant-making best practice (Carrington et al. 2017; Putnam-Walkerly 2018; McCray, 2014). These publications also identify other best practices that while going beyond the scope of this paper, seem prudent to outline as areas for further exploration. To that end, often noted best practices include:

- **Supporting Non-profit Capacity Building**- Grant making that allows non-profit's to build capacity requires flexibility in terms of how those funds including; to develop leadership skills, build financial capacity, fund operational costs, and/or to evaluate its' work.
- **Long-term Granting**- Resilience and mission realization are built through the provision of longer-term grants (2 years or more).
- **Continuous Learning**- Evaluation is a tool that enables grant makers, in partnership with grantees and community members, to learn and improve. It helps build an understanding of what is working and what needs to be done differently. These partnerships also help to shape evaluation efforts including

the development of evaluation goals and metrics. Through these activities, grant-makers ensure a continuous improvement model is adopted and that greater community impact can be realized (McCray, 2014; Voigt, 2015).

- **Streamlining Operations**- This involves the review of all aspects of a grant making organization, from the design of funding applications to its' internal operations.
- **Seeking Out Innovation**-Carrington et.al (2017) suggested that their non-profit grant-making research into a wide range of international examples "revealed very little evidence of innovation." Examples that they did identify as innovative hailed from the for-profit sector and included supporting start-ups and incubation programs, helping to test and scale ideas, use of investment managers and use of shared office spaces.

To ensure best practices are embraced, strengthened relationships with grantees is pivotal. Building trust and seeking out the knowledge and perspective of non-profit and community groups can help strengthen both the grant giving and grant receiving organizations and support the mission achievement of all.

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