

THRIVING NON-PROFITS

Financial Strength. Community Impact.

Thriving Non-Profits is a cohort program presented by non-profit leaders for non-profit leaders to help organizations adopt financial diversification strategies to drive greater impacts and scale. This program is for organizations that want to:

- improve impacts and financial strategies to get there,
- connect with other leaders for learning and support, and
- be part of a culture shift in the community sector: from scarcity to abundance and from short term projects to long term outcomes.

Each participating organizational team will consist of three people who will all take part in workshops with coaching tailored to your goals. Ideally this would be a board member, your executive director, and a senior staff person. You will leave with a financial diversification strategy and an implementation plan for your organization, linked to the overall impact you want to create.

- Six sessions in total -- 1 full-day and 5 half-day
- 10 hours of coaching support
- A completed financial diversification plan
- Presentation of your plan to the full cohort

Session Topics Include:

1. **Financial diversification strategies, culture and risk**

There is lots of money out there—the question is, what are the risks and potential rewards of accessing it?

- identify the different types of money available and approaches for financial diversification,
- assess the risks and rewards of each against your organization's current situation,
- explore options to reduce risk or shore up weaknesses, and analyze the long term impacts, and
- set the stage for your organization's financial diversification strategy.

2. **Social procurement and multi-year contracts**

Understand the growing movement of social procurement and how you can position your non-profit to benefit from these upcoming opportunities:

- Contracts vs grants,
- Procurement processes and social impact,
- Negotiating multi-year contracts,
- Partnerships with other suppliers, and
- Leveraging your own procurement for greater impact.

3. **Fee for service**

Most non-profits have introduced fees, but charging fees is not without some risk and cultural navigation.

- assess the effectiveness of your current organizational approach (or non-approach) to fees,



- identify different fee-for-service options and models,
- assess the culture and risks associated to fees, and
- assess and incorporate risk management strategies.

4. ***Social Enterprise and market participation***

Consider the “enterprising continuum” and identify the entrepreneurial attitudes and practices that you can apply in your organization.

- explore the full spectrum of enterprising activities,
- assess how entrepreneurial your organizational culture is and how to strengthen it,
- identify assets that you could expand into the marketplace and assess the risks, and
- create a plan for next steps including access to research, grants and mentoring.

5. ***Win-Win partnerships***

Philanthropists, corporations and social financiers are changing how they support organizations, including looking for mutually beneficial partnerships.

- Identifying and assessing prospective partnerships to find the “value added” fit,
- framing a win-win partnership and making compelling pitches,
- how to structure partnership agreements, and
- emerging trends in social finance.

6. ***Mobilizing underutilized assets and the role of real estate***

Explore the rationale, assess the community context and identify the role of real estate in your financial strategies.

- ensure you are getting the most out of your existing space (and other assets),
- explore real estate options for your organization and assess what it will take to realize them,
- identify financing options and understand the lender’s needs, and
- understand the challenges and opportunities in managing real estate.

7. ***Achieving scale and impact***

Scaling is not always about getting bigger—it is about finding the best route towards systems change and achieving your mission impact.

- mapping the scale required to achieve your desired impacts,
- connecting your financial diversification strategies to achieve greater impacts,
- defining existing and additional skills and assets required to achieve it, and
- maintaining momentum towards action and implementation.

Email Anna Glenny at aglenny@victoriafoundation.bc.ca to request an application. (approx. 30 minutes to complete)

Please email your completed application to Anna Glenny by December 14th at 12pm.

Eight organizations will be selected to participate in the 2018 cohort. Decisions will be made based upon the match between the goals of the organization and the *Thriving Non-Profits* program priorities.

Each organization is asked to contribute \$750 to cover three participants from your organization and help with venue, food and materials costs.

Applicants will be notified by Monday, December 18th.

If you have any questions, please contact **Anna Glenny** at aglenny@victoriafoundation.bc.ca or 250-381-5532.



Team

Michelle Colussi

Michelle began her career as a teacher in 1982. Over the last 30 years, her experience includes co-founding three organizations, serving as Executive Director of two, and working with numerous NGOs to support staff learning, strategic planning and social enterprise development. She co-authored the Community Resilience Manual that has been used around the world and was Canada's first Transition Town trainer. Her work today is focused on strengthening community and organizational resilience through training and facilitation.

Carol Hall

Carol Hall leads the community initiatives and grants program at the Victoria Foundation, drawing on 20 years of experience with the non-profit sector. She has worked on projects in Victoria and internationally to mobilize the knowledge and tools to support community groups to increase their impact in an era of rapid change. Prior to moving to Vancouver Island in 2007, she was executive director of a family foundation in New England where she facilitated partnerships and led projects to conserve farms and natural areas.

Lee Herrin

Lee has worked in management and leadership roles in both public sector and non-profit environments over the past 15 years. He also has 20 years of experience serving on boards of directors, including 15 years chairing non-profits. In any setting, he is always focused on identifying opportunities for growth and greater impact. He is widely recognized as having successfully reduced his organization's grant reliance while also creating additional impact through social enterprise.

Kristi Fairholm Mader

Kristi has extensive experience in non-profit and social enterprise sectors in both rural and urban communities. She has founded and managed several social enterprise initiatives, including The Cleaning Solution and Lunch a la Kart, and was Director of Social Enterprise for Planned Lifetime Advocacy Network (PLAN). Since moving to Vancouver Island, Kristi has been supporting the growth of the social enterprise sector through collaborative and cross sector approaches and events such as seCatalyst and by working with non-profits to integrate enterprising approaches into their operations and future.

Kristi Rivait

During the last 15 years, Kristi has worked in both political and social organizations at the leadership level to transform organizational culture, design and integrate sustainable finance models, build leadership pipelines, elevate engagement, and scale impact. She fosters collaboration between community, non-profits, business and government and mobilizes change campaigns. She helps ensure the environmental and social goals of those areas, lead to economic sustainability, especially within those organizations and businesses that deliver impact.