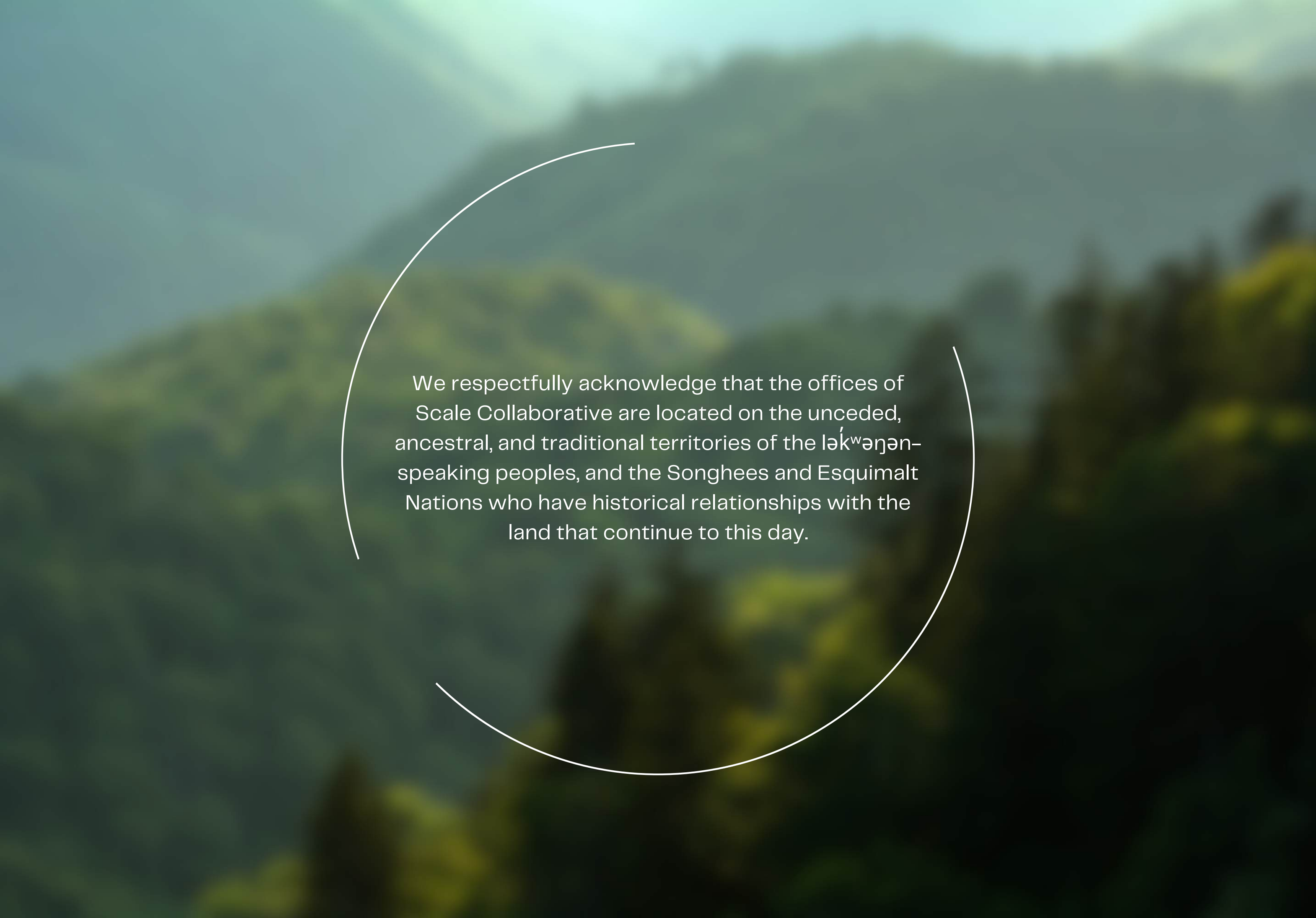


Impact Report

2023





We respectfully acknowledge that the offices of Scale Collaborative are located on the unceded, ancestral, and traditional territories of the lək'wəŋən-speaking peoples, and the Songhees and Esquimalt Nations who have historical relationships with the land that continue to this day.

Message from the Directors



In 2023, Scale Collaborative invested in growth:

- We doubled the size of theDock: Centre for Social Impact by taking over and renovating the 1st floor of 722 Cormorant to accommodate additional offices, a state-of-the-art classroom and more community and meeting space,
- We developed and launched Thriving Non-Profits self-paced program alongside an online Community for non-profit changemakers,
- Connect Money Impact went on the road and partnered with Purppl and Future of Good for an inaugural event in the Okanagan,
- Thrive Impact Fund reached the target raise of almost \$5M—halfway to our overall goal of a \$10M fund,
- Scale Collaborative achieved BCorp status, and
- Our various initiatives (BC Social Procurement Initiative, Business Legacies Initiative, Community Wealth Building) continue to advance systems change towards a more equitable and sustainable future.

As leaders, we recognize that growing across the family of organizations is not possible without the incredible team of passionate people who are walking alongside us on this journey. We are blessed and grateful to work with this team.

Scale's work is deeply embedded in the community, and we celebrate the efforts of organizations that are working to solve today's greatest challenges and create vibrant communities. We are honoured to work alongside amazing values-aligned partners to bring more abundance into the non-profit and impact sectors. We appreciate both new partners joining us in 2023 and also the deepening partnerships with those who have been with us for many years.

In 2024, we look forward to continue growing Scale's impact and to deepen our relationships with partners, organizations, investors, investees, and fellow co-workers.

Kristi B., Lee H. & Kristi F. M.

Impact Highlights



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our team

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partnerships

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Scale Works at the Intersection of Culture, Capacity, and Capital

CULTURE

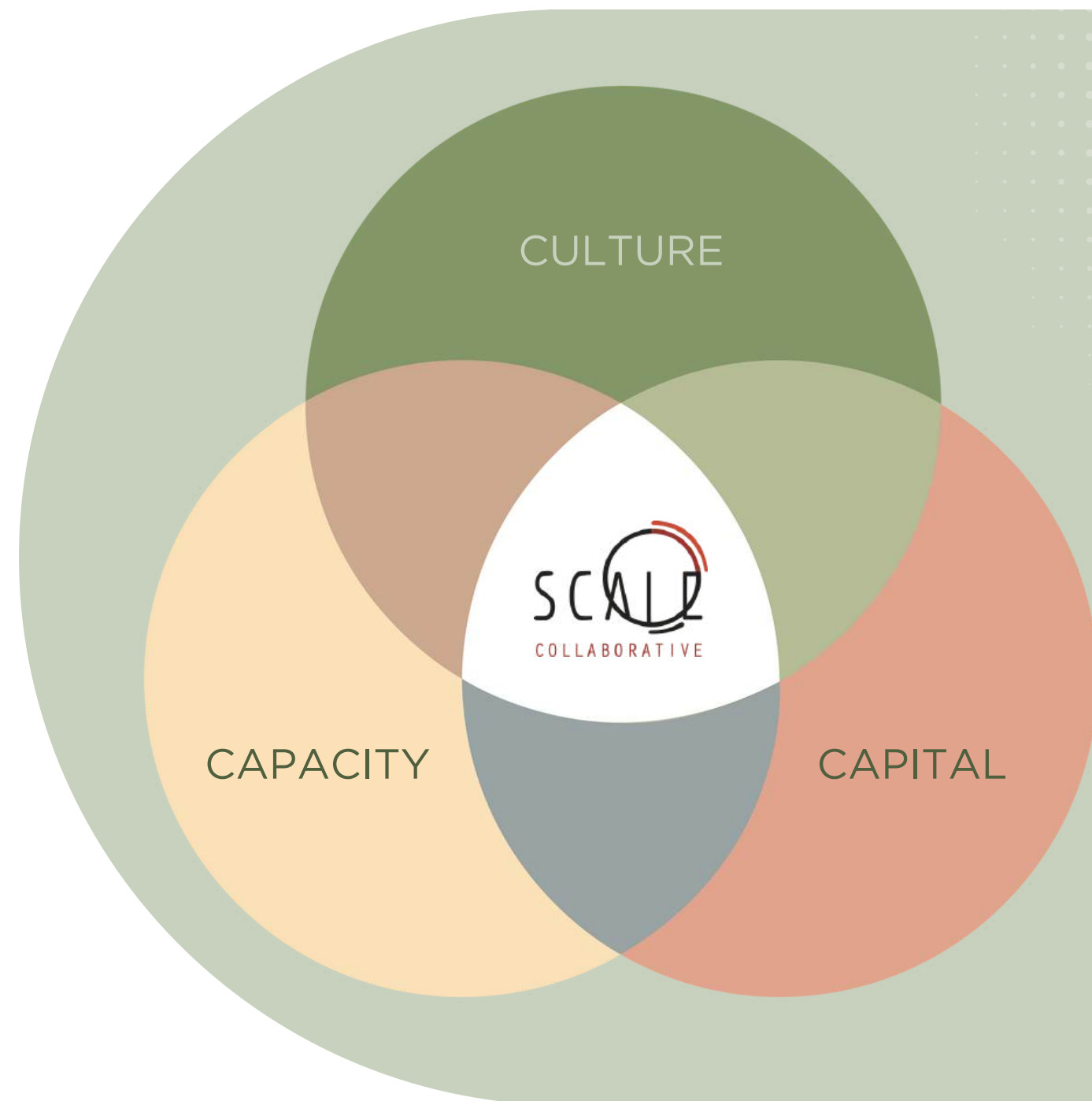
Supporting organizational cultures that embrace curiosity, enterprising approaches, and a shift from scarcity to abundance.

CAPACITY

Building capacity in organizations and systems to innovate, strengthen, and expand their impact.

CAPITAL

Removing barriers to capital and mobilizing resources that place the community at the centre of the economy.



THE SCALE COLLABORATIVE FAMILY



Scale Collaborative

Mission: Scale Collaborative helps organizations transform through coaching, consulting, programs, and capacity building and creates system-level change by increasing access to resources and capital.

Vision: Scale Collaborative envisions a thriving, connected, and abundant social change sector.

Scale in Community

Scale Collaborative's work is deeply grounded in local communities. We value building strong relationships and partnerships and contributing to important conversations through events and gatherings. We believe in the importance of showcasing and supporting the work of social change organizations and contributing through committees and board leadership. Here is how we contributed in 2023:

Events



Purppl introduced Connect Money Impact to the Okanagan in October, bringing together social entrepreneurs, impact investors, and ecosystem builders for a day of inspiration, learning, and connection. We were pleased to partner with Purppl and Future of Good to make this happen.



Thrive Impact Fund and partners hosted a series of Social Enterprise Conversations in Campbell River, the Comox Valley, and the Cowichan Valley.

Events (CONT'D)



BC Social Finance Fund Roundtable



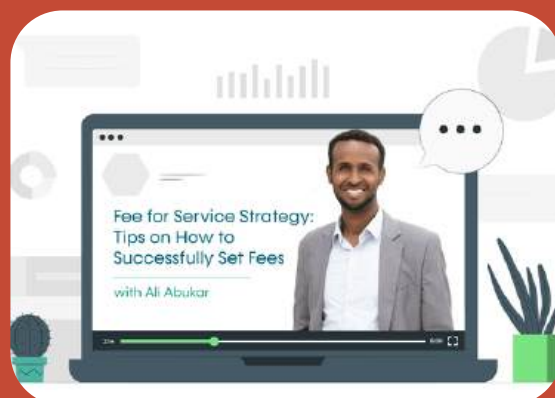
Non-Profit Financing: A Conversation with Women Leaders



Ownership Matters: Community Ownership and Wealth Series



Breaking Down Barriers to Financing for Women Non-Profit Leaders



Integrating Sustainable Growth Series: Online webinars to support non-profit leaders as they integrate financial diversification strategies, including:

- Fee for Service Strategy: Tips on how to Successfully Set Fees,
- How to Access Grants Strategically to Grow Your Social Enterprise,
- Ask Me Anything on Social Enterprise,
- Demystifying Social Finance for Non-Profit Organizations, and
- Celebrating Your Organization's 2023 Achievements

Events (CONT'D)



Kristi Rivait with The Social Economy through Social Inclusion (SETSI)



Emeline Leguen and Robyn Welsh at Food Security AGM



Kristi Fairholm Mader and the Vancouver Island Economic Alliance (VIEA) Board Leadership.



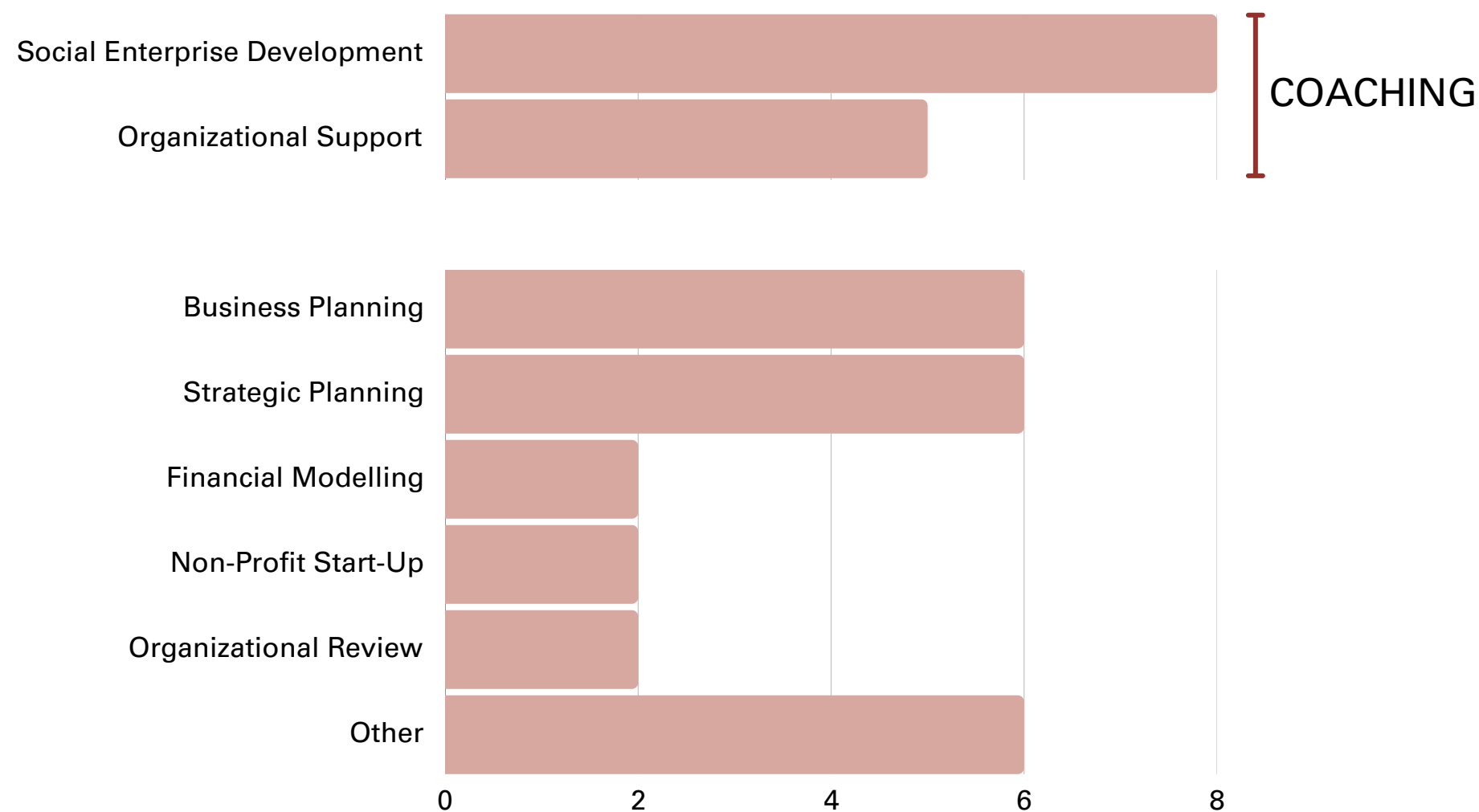
The Victoria Community Food Hub Security (group) & Kira Selah, Operations Manager, at launch of Kitchen Connect.

Coaching and Consulting

Scale Collaborative provides coaching and consulting that promotes organizational change, facilitates enterprise development, and, in turn, helps organizations become more enterprising, resilient and impactful. In addition to coaching and consulting services provided by Scale Collaborative in 2023, the 63 organizations participating in the Thriving Non-Profits program also receive access to coaching.



EXPERTISE SHARED: COACHING & CONSULTING ENGAGEMENTS



Organic BC: Financial, Policy and Governance Reviews chart a new course

Organic BC reached out to Scale in 2022 for support in analyzing the value of administering the BC Certified Organic Program and verifying certifying bodies to the Canadian Organic Regime.

Throughout 2023, we continued our collaboration, culminating in a report on the operating context of Organic BC and a financial assessment of Organic BC's various activities. This work was generously supported by the BC Ministry of Agriculture and Food.

Discovering that Organic BC needed to strengthen its revenue model, the Organic BC team rolled up their sleeves and got to work. They participated in Scale's Thriving Non-Profits program in the spring and summer of 2023 before inviting Scale to facilitate a planning retreat in Armstrong, BC, in September.

The collaboration continued as we co-developed an agenda designed to explore several key strategic questions in depth over a two-day period, with the Ministry also in attendance.

The Ministry supported a further initiative through the fall of 2023 and into 2024 to review the policy and governance options for Organic BC moving forward. This work identified key regulatory and policy changes that the Ministry could consider to better support the work of Organic BC.

With renewed focus and support from Scale, Organic BC has clarified its strategic direction. It has been a time of growth and development for the organization.

Looking ahead, in the coming year, Organic BC and Scale have their sights set on the MakeWay Foundation's Innoweave program. We're eager to see how this opportunity will help Organic BC further implement and build upon its renewed strategy.



“Thank you so much for all your work this year. It's been quite the year, and I cannot imagine having gone through it without Scale Collaborative's support!”

—Eva-Lena Lang, Executive Director



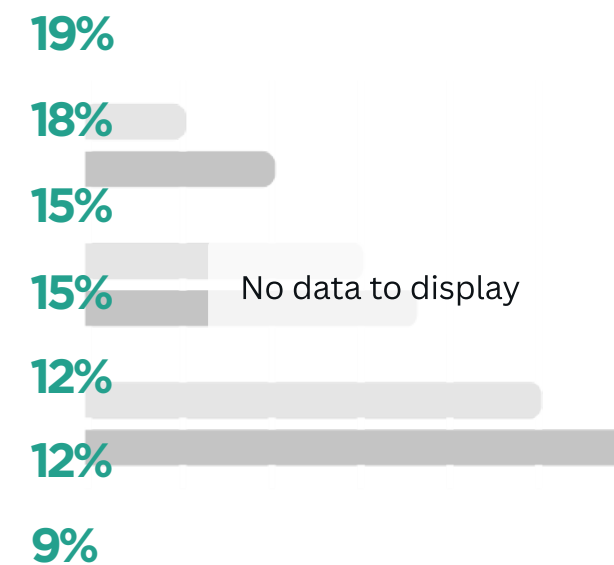
Thriving Non-Profits

Thriving Non-Profits

Thriving Non-Profits is a leadership capacity-strengthening program developed by non-profit leaders for non-profit leaders. The program transforms organizations through financial diversification that supports increased impact. In 2023, the program supported 63 organizations through its cohort model. Cohort participants joined from the Northwest Territories, British Columbia, Alberta, Manitoba, Saskatchewan, Ontario, Nova Scotia, and Newfoundland.

In July, Thriving Non-Profits launched a newly designed, self-paced model that supports individual learners and launched an online Community Hub that engaged with over 400 impact leaders across Canada in 2023.

FOCUS AREAS OF PARTICIPATING ORGANIZATIONS IN 2023



REVENUE DIVERSIFICATION STRATEGIES IMPLEMENTED*



*This graph represents the Thriving Non-Profits alumni up to and including 2023 who have implemented one or more revenue diversification strategies. Throughout the delivery of the program, over 50 organizations have also reported experiencing a significant culture shift.



“The Thriving Non-Profits Program has been a game-changer for us, opening our eyes to the many options available on the road to success. We've discovered that we can pave our own way and are moving forward with a newfound sense of confidence, optimism, and excitement. We are truly grateful for the knowledge and support we've received through this program.”

—Ken Donnelly, Board of Directors, Canadian Council on Invasive Species



“I wish every non-profit in the country had access to this magnificent program! The program itself is very well-designed. It’s clear and informative and gives actionable information... I have found myself looking forward to each three-hour Zoom session. That should be a strong indication of the value of the program and the quality of its design—after all, how often does anyone look forward to a three-hour Zoom call?”

—Christine Hennebury, Board President, Storytellers of Canada Fall 2023 Cohort

Thriving Non-Profits is developed by Scale Collaborative and delivered to specific regions and across Canada, through partnerships. Thank you to our partners, your contributions are helping the non-profit sector become more financially resilient. Thank you to:

PRESENTING PARTNER



COMMUNITY PARTNERS THAT HAVE SUPPORTED WITH BURSARIES



Conseil des Arts
du Canada

Canada Council
for the Arts



Thank you to the Thriving Non-Profits coaches and facilitators for their support of the program and participating organizations: Anant Kaur Saini, Andy Telfer, Christy Morgan, Danielle Gibbie, Farah Nazarali, Janice Iverson, Jessica Ketwaroo-Green, Josée Payant, Julia Grady, Kimberley Nemrava, Kurt Archer, Kyle Empringham, Leslie Dunning, Lisa Caton, Michelle Cho-Black, Susan Climie, Tanya Koshowski, Yash Mehta.

Action Dignity Society: Developing Fee for Service Anti-Racism Training Program and Expanding the Organization's Geographical Reach

Action Dignity Society, which participated in the Fall 2022 Thriving Non-Profits cohort, is an incredibly impactful non-profit that empowers its members and facilitates connections and opportunities for members to act and influence the decision-makers and systems that affect their daily lives.

Action Dignity credits how the team learned to think about fund development beyond the standard sources, shifting its culture of money and how it interprets financial risk to the Thriving Non-Profits program. The program has enabled them to move from theory to developing an actionable plan around the ability to scope grants, increase individual donations, develop a fee for service anti-racism training program, and use partnerships to expand its impact and reach. The opportunity to work with a coach was a notable highlight. Coaching support helped break down the daunting task of developing a financial diversification action plan into actionable pieces and provided Action Dignity with valuable insights and feedback.



“Thriving Non-Profits provided the members of the Action Dignity leadership and fund development team with a common language and common tools that we can use to move our agenda forward collectively, cohesively, and confidently.”

—Francis Boakye, Executive Director, Action Dignity Society



Rural Development Network: Moving Forward New Financial Opportunities to Have Even More Positive Impact

Rural Development Network (RDN) is a national non-profit that empowers rural communities and champions rural community development. Their initiatives include rural homelessness, Indigenous engagement, rural immigration, sustainable housing and work-integrated learning. RDN graduated from the Thriving Non-Profits program in February 2023.

The participating team at RDN said multiple key pieces of the Thriving Non-Profits program made a huge difference for the non-profit. One key piece is that the program allowed the RDN team to have the space to look at their current financial trends and program analysis and discuss possible solutions. Having the strategic time carved out, structured module-by-module learning, and peer discussions were exactly what RDN needed to develop and hone a financial sustainability strategy. RDN is focusing on three new areas of financial diversification, fee for service, events, and assets and real estate.



“The program helped us look at various opportunities and challenges differently and provided useful tools for deeper analysis and learning. With supporting information and resources from the online content, and with feedback and ideas that came from sharing and discussing with other organizations, we’ve been able to focus on key next steps as well as identify new financial opportunities to explore that we hadn’t considered before. These financial opportunities will enable us to have even more positive impact.”

—Lisa Belanger, Director of Operations, Rural Development Network



Thrive Impact Fund

Thrive Impact Fund

In the first 18 months of operations, Thrive Impact Fund achieved several milestones and experienced early success in deployment. The past year, 2023, presented a different context and we experienced the impacts of the inflationary and recessionary environment in several ways:

- A lower amount of investment interest that resulted in slower deal flow,
- Portfolio companies in the retail sector were most impacted by shifting customer purchasing, and
- Portfolio companies that were well-positioned in COVID-19 needed to adapt (again) to an uncertain context.

However, by the end of September, organizations were feeling more confident, and there was an uptick in investee interest.

Thrive is focused on continuing to raise funds from investors and raising awareness in the community. In the past year, we:

- Reached nearly \$5M committed by values-aligned investors,
- Honed our portfolio management and financial analysis processes,
- Deployed one investment and made two commitments—all into non-profit organizations—representing \$470,000 of investment,
- Piloted two bridge loans, one in support of a community bond raise,
- Gained significant profile through speaking and outreach engagement,
- Hosted four Social Enterprise Conversations across Vancouver Island and a sold-out Connect Money Impact in Kelowna, and we
- Led systems-change work on first loss capital and blended/catalytic capital convening.

THRIVE IMPACT FUND INVESTEEES ARE WORKING TO SUPPORT THESE UN SUSTAINABLE DEVELOPMENT GOALS





Launch of Victoria Community Food Hub Society's (VCFHS) social enterprise Kitchen Connect with Kira Selah.



“Financial support is essential while we’re growing our venture so we can build a strong team to support our local food community in a sustainable and equitable way. The peer group and coaching will help us build our expertise; we are excited and feel we’ve started on a good path together.”

—Laura Gair, Victoria Community Food Hub Society



Laura Gair, Programs & Resource Development Manager, VCFHS, Linda Geggie, Executive Director, CR-FAIR and Kristi Fairholm Mader, Managing Director, Thrive Impact Fund at Victoria Community Food Hub Society's (VCFHS) social enterprise launch, Kitchen Connect, in October, 2023.

The Makehouse

Founded shortly over a decade ago in Victoria, The Makehouse had established itself as a local pillar for anyone interested in sewing when the founder was ready to sell. Concerned about what their employment would look like under new ownership, the store's five employees talked it over and decided they were ready to buy.

"I had thought about the possibility of trying to buy the business on my own and quickly thought 'no, absolutely not, I don't want to do this by myself,'" says Kat Camfield, the Co-op's general manager. "But then when I talked to the other staff, the idea of sharing the ownership, sharing responsibility, getting to set the terms of our work, all of that really appealed to us, so that's why we went ahead with a worker co-op."

The Makehouse staff were able to participate in CWCF's Worker Co-op Academy, which provided extensive coaching and a supportive environment within which to learn the necessary skills for running a worker co-op. The staff purchased the enterprise, with assistance from Thrive Impact Fund, and re-launched it as a worker co-op at the beginning of December 2022. Although it took many meetings in the early months to get there, Camfield says the benefits of the new model are already evident.

"We get paid better," Camfield says. "We have a lot more say over the conditions of our work. We're better able to respond to our needs. We almost always come to a consensus on every decision we make. So it's really great to be able to have that much control over the work that we're doing and define our roles." – adapted from the Canadian Workers Co-operative Fund case study, April 2023.



"The Thrive Impact Fund team helped us understand all the ins and outs of the importance of our impact on the community, environment, and economy. Our conversion to a worker's co-op was a natural step forward that would include these aspects. With the Thrive Impact Fund, we know we have the support needed to make our dream co-op a success."

—Tanya King, The Makehouse Co-op

TheDock: Centre for Social Impact

theDock: Centre for Social Impact

theDock, Scale's social enterprise, provides flexible downtown coworking and office space, meeting rooms and event space for Victoria's social impact community and beyond.

With a wide range of flexible work and event space options, theDock fosters a vibrant, inspiring community that encourages collaboration. By offering various professional development opportunities, community-building events, and other impactful programming, theDock is creating a more connected social change sector.



*theDock's Community Business Partnership program offers Dockmembers discounts on products and services from local businesses. Community Business Partners also support events at theDock.



"Working at theDock has improved my life because I get to connect with a whole bunch of cool people I otherwise wouldn't be able to cross paths with. I've been able to make friends at theDock who make me look forward to coming in (for work and for community events). The salad club has also literally saved my life many times when I have forgotten a lunch and it's so nice to take some time with other members to enjoy a meal. I love theDock. #DockForLife"

—Alistair, CRFAIR & the Good Food Network

theDock's MEMBER ORGANIZATIONS



“

“People who attend events hosted by the Victoria Downtown Residents Association at theDock find the space welcoming, and theDock’s staff are always super helpful. As one of the few neighbourhood associations in Victoria that does not have a community centre, it has been incredibly helpful to have access to space at theDock for putting on community events.”

—James Davis, Community Engagement Coordinator, Victoria Downtown Residents Association

Making more space for impact and innovation

Grew from 6500 to 12000 sqft. of entire space

4
new meeting rooms

9
new private offices ideal for one person

2
new private offices for small teams

24
new dedicated desks

New 'Reef' coworking lounge on first floor

OUR GROUND FLOOR EXPANSION PROJECT



Full and ready to grow,



we were excited to see...



the impact community grow with us!

British Columbia Social Procurement Initiative

British Columbia Social Procurement Initiative

Scale Collaborative provides project management support and leadership for the British Columbia Social Procurement Initiative (BCSPI). BCSPI is a shared learning program that provides training, expert support, tools, and resources for governments and institutional purchasers across BC to integrate social procurement into existing purchasing practices.

In 2023, new local governments and institutional purchasers from across the province joined BCSPI. BCSPI also released its [second annual impact report](#) and hosted season two of the popular [Purchasing Power webinar series](#), exploring how procurement can help mitigate some of the most pressing challenges our communities are facing.



WE'D LIKE TO RECOGNIZE THE FOLLOWING ORGANIZATIONS AND PEOPLE FOR THEIR CONTRIBUTION TO THE SUCCESS OF BCSPI IN 2023:



David LePage
Tori Williamson
Emma Raenarts



Rory Kulmala

Supported by:



City of Courtenay: Creating an Indigenous Procurement Policy

The City of Courtenay has been a member of the British Columbia Social Procurement Initiative (BCSPI) since 2017, and has successfully implemented social procurement in a number of projects. In 2021, the City was approached by the K'ómoks First Nation's Economic Development Corporation (KEDC), who were interested in learning about opportunities for First Nations businesses within the City's procurement practices.

At the time, staff were already working on updating the City's procurement policy to incorporate social and sustainable procurement and saw an opportunity to include language relating to Indigenous procurement. As part of the policy development process, the City conducted multiple rounds of engagement with the K'ómoks First Nation, including regular meetings and feedback.

In 2023 the new policy was approved by the City Council. Through its new Indigenous procurement considerations, the City will endeavour to award 10% of projects valued at over \$1 million to K'ómoks First Nation designated businesses through "directed procurement opportunities" while ensuring adherence to the legal requirements of applicable trade agreements. As the new policy is implemented, the City recognizes the importance of continuing to work collaboratively and communicating regularly with the K'ómoks First Nation to build on the existing relationship and ensure that shared objectives remain aligned.

“Indigenous procurement is one of several tools that local governments can use to support reconciliation by providing opportunities to our First Nations partners and Indigenous businesses.”

—Scott Hainsworth, Manager of Procurement and Risk



Scale Institute Society



Building a strong social economy ecosystem through research, education and innovation.

Scale Institute is an independent non-profit with a purpose to build a strong social economy on Vancouver Island and beyond. The Institute provides research, development, educational programming, and testing of innovative solutions. In 2023, the Institute focused on three main initiatives:

- **Community Wealth-Building:** this project continued to advance through developing a business plan and financial model for a trust-like structure to own and operate businesses and assets, for community. The Institute partnered with Royal Roads to host the Ownership Matters webinar series (in process).
- **Non-Profit Financing:** this research project was funded by ESDC to explore the specific barriers non-profits and, in particular, women leaders face in accessing financing, both internal to their organizations and externally from financial institutions. The literature review, report and webinar findings are posted on the Scale Institute website.

Non-Profit Assets: this project, funded by the Victoria Foundation, is focused on mapping non-profit-owned assets in partnership with the Map Shop at UVic. The purpose is to understand the current status of community assets, if those assets are at risk of privatization, and options for maintaining such assets in the hands of community.

THE 2023 SCALE INSTITUTE BOARD OF DIRECTORS INCLUDED JOANNA BUCZKOWSKA-MCCUMBER, CHAIR; JOLYNN GREEN, VICE-CHAIR; KARIANN AARUP, TREASURER; MICHELLE CHO-BLACK, DIRECTOR.

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TEAM BUILDING ACTIVITIES



Strength in Partnerships and Collaboration

Scale Collaborative approaches partnership intentionally to increase impact. Together, we can create, combine, and leverage capacities and resources for long-lasting, impactful change. Scale Collaborative deeply values each partnership and would like to recognize our core partners in 2023:





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