

THRIVING NON-PROFITS CALGARY FOUNDATION

IMPACT REPORT

2020 - 2022



Thriving Non-Profits is a leadership training program created by non-profit leaders for non-profit leaders. The program helps organizations develop the mindset, culture, and strategies required to integrate new entrepreneurial approaches that achieve financial resilience and greater community impact. The program has been informed by over 250 leaders in the charitable and non-profit sector.



CALGARY FOUNDATION AND SCALE COLLABORATIVE: A PARTNERSHIP TOWARDS HEALTHY COMMUNITIES

In response to the growing need from stakeholders wanting to integrate financial resilience beyond granting, Calgary Foundation (CF) partnered with Scale Collaborative, an aligned organization with a proven financial diversification program for non-profits. This partnership gives CF stakeholders access to tools, knowledge, and practical application in developing revenue streams that speak directly from the experiences of non-profit leaders.

Scale Collaborative is the result of three charity Executive Directors whom each brings 20+ years of leadership experience in the non-profit sector. As Executive Directors, with the diminishing returns of traditional fundraising, they integrated strategies to develop unrestricted revenues to support new ways to deliver on mission, scale programming, and support operational costs.

They recognized that their learnings could support other organizations in how to operate and grow the charities and non-profits of today. Scale Collaborative was born from this new way of thinking with a vision of a financially sustainable non-profit sector. Scale Collaborative is deeply embedded in the sector, works with 100+ organizations each year and is considered a Knowledge Leader on non-profits and financial sustainability in Canada.

Through the Thriving Non-Profits program, the Calgary Foundation is a proactive community leader, investing within and strengthening the charitable and non-profit sector beyond grantmaking. Thriving Non-Profits Alumni are thinking and acting differently and are intentionally embedding diversification toward greater impact. A more sustainable charitable and non-profit sector is better equipped for long-term community benefit.



“As our partnership continues, and the number of organizations participating grows, this becomes game-changing for the community in many ways, including an increase of financially sustainable organizations, shifting sector culture from a scarcity mindset into abundance thinking and inspiring organizations on new ways to communicate and collaborate in their teams and sector-wide. The financial support CF provides to run the program gives equal access to new tools and knowledge, peer sharing, and strategic team time. This is a truly system-level change in action.”

*Kristi Rivait, Co-Founder,
Scale Collaborative*

PROGRAM CURRICULUM

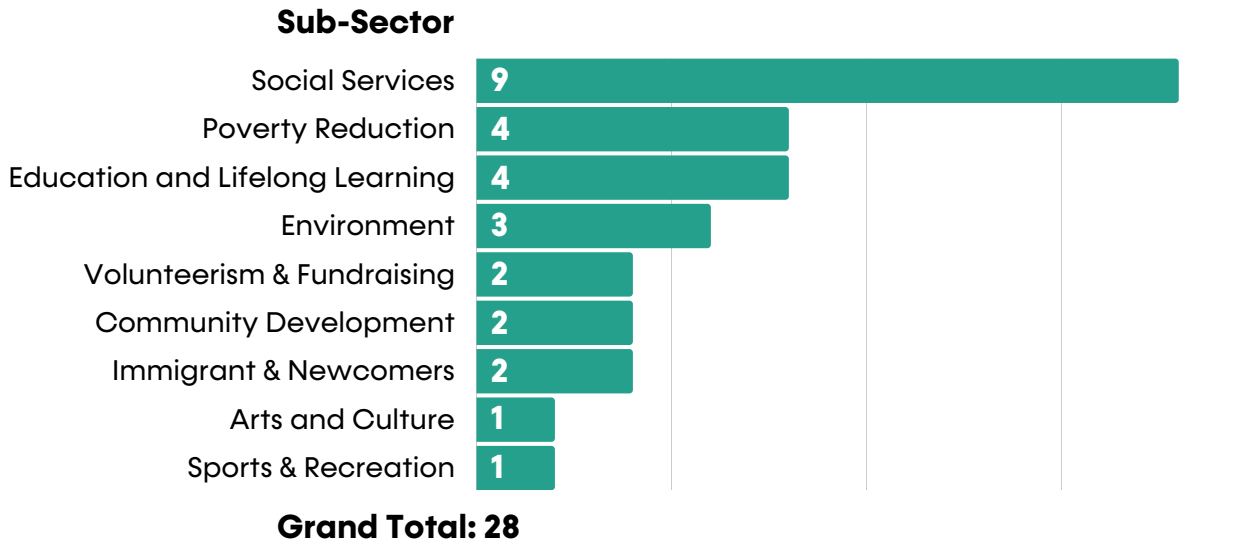
THE THRIVING NON-PROFITS REVENUE DIVERSIFICATION HONEYCOMB



- Module **1** | **CULTURE OF MONEY**
Explore your current financial state, challenge your organization's limiting beliefs and make the shift to abundance
- Module **2** | **ENTREPRENEURIAL APPROACH TO TRADITIONAL STRATEGIES**
Apply entrepreneurial thinking to traditional non-profit fundraising strategies: donations, grants, events, and contracts
- Module **3** | **FEE FOR SERVICE**
Explore fee for service models, pricing strategies, risk management, and managing change
- Module **4** | **SOCIAL ENTERPRISE**
Explore your social enterprise readiness, startup or acquisition opportunities, growth strategies, governance, and legal structure
- Module **5** | **ASSETS**
Map your financial and physical assets, shift from underperforming to performing, and explore social purpose real estate as a strategy
- Module **6** | **PARTNERSHIPS**
Understand the value of your brand, find, and build strong corporate and philanthropic partnerships, and craft a compelling value proposition
- Module **7** | **LEVERAGE**
Align your organization's hiring, purchasing, banking, and investments to your mission and increase impact
- Module **8** | **FINAL PRESENTATIONS**
Solidify your strategy and gain the wisdom of the collective by presenting to your program cohort

Between 2020 - 2023, Calgary Foundation supported 28 organizations to participate in Thriving Non-Profits. Participating organizations were selected through an application process.

FOCUS AREAS OF PARTICIPATING ORGANIZATIONS



“These past months taught us to think outside the box and be hopeful. This experience gave us the space, information and support we needed to take a deep dive into our organizational finances, mandate and focus.”

—Nisha Sridhar, Calgary Horticultural Society.
Spring 2021 cohort participant



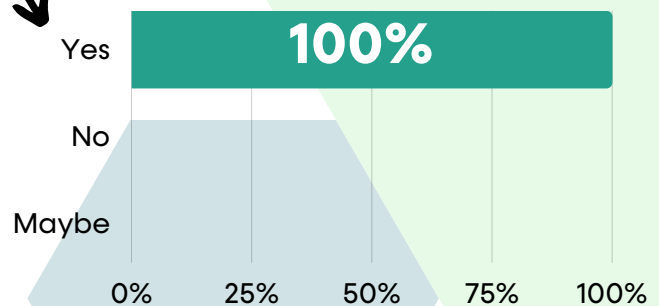
“I highly recommend Thriving Non-Profits program. The education and learnings have been incredible, building on our foundations to date and giving us the tools to move ahead, diversify, and build stronger for the future.”

—Jamie McCulloch, Executive Director, Rocky Mountain Adaptive.
Spring 2022 cohort participant

When asked:

“Would you recommend Thriving Non-Profits to other organizations?”

100% of participants answered: Yes



CASE STUDY OF PROGRAM PARTICIPANT: LINKAGES SOCIETY OF ALBERTA

As a 2022 Calgary Cohort participant of the Thriving Non-Profits program, LINKages took seriously the opportunity to engage leadership at all levels of the organization and ensure key decision-makers worked together to develop a strategy rooted in shared understanding and accountability. The program came at a time when LINKages recognized that due to the shifts in the funding landscape, it would be imperative to change how they secured operating revenue.

Ruby Lecot, Executive Director, shared that having a dedicated learning environment and community was a transformational aspect of the program. The team deeply valued being introduced to exercises and tools that helped shape and (re)frame their current context. For the first time, the organization assessed its financial history and trends over time, an eye-opening experience as they learned that the primary revenue strategies the organization had relied on for the past 25 years were no longer viable to pursue. While the organization was good at being nimble and responsive, they were not well equipped to make strategic and informed decisions – skills essential for organizational sustainability and impact.

With the funding and program analysis they received in Module One, they could see that 80% of their resources were derived from government funding. Far from a place of diversified revenue, LINKages set out to devise a strategy that considered the relationship between their programs and revenue. The team envisioned a new reality where programs deliver community impact and actively contribute to organizational sustainability.

Curriculum content and tailored coaching supported the team in identifying and assessing revenue strategies that align with programs and services and outlined the work and skill sets needed to execute and achieve their goals. Today, the team is actively implementing strategies developed through the program.



“It wasn’t that we were making decisions haphazardly, but up until we participated in the program, we had not been adequately using organizational and industry information to inform our strategy.”

—Ruby Lecot, Executive Director, LINKages

LINKAGES'S REVENUE DIVERSIFICATION PLAN

FEE FOR SERVICE

Intergenerational Outreach and Training

Revenue Goal: support 10% of revenue
By leveraging niche expertise gathered over 26 years, the organization has developed a fee-for-service approach for its Intergenerational Outreach and Training services.

A grant secured through Calgary Foundation's Spring 2022 Community Grant program supports the organization in scaling this work and ensures they can resource hiring a part-time coordinator. Since participating in the Thriving Non-Profits program, LINKages decided to evolve the training program to be offered virtually, allowing them to reach a national audience.

SOCIAL ENTERPRISE

Legacy Journal

Revenue Goal: generate 25% of revenue by 2025

They recognized that book sales, marketing resources, and potential reach had come a long way and that these journals could serve a core demographic of their target audience: seniors, students, and teachers. LINKages has devoted time, effort, and resources to the initial prototyping of Legacy Journal. As of December 2022, the journals have gone live on Amazon. The team continues to learn more about how to utilize Amazon SEO and develop ad campaigns that align with cyclical sales (including holidays like Christmas, Mother's Day, and Father's Day).

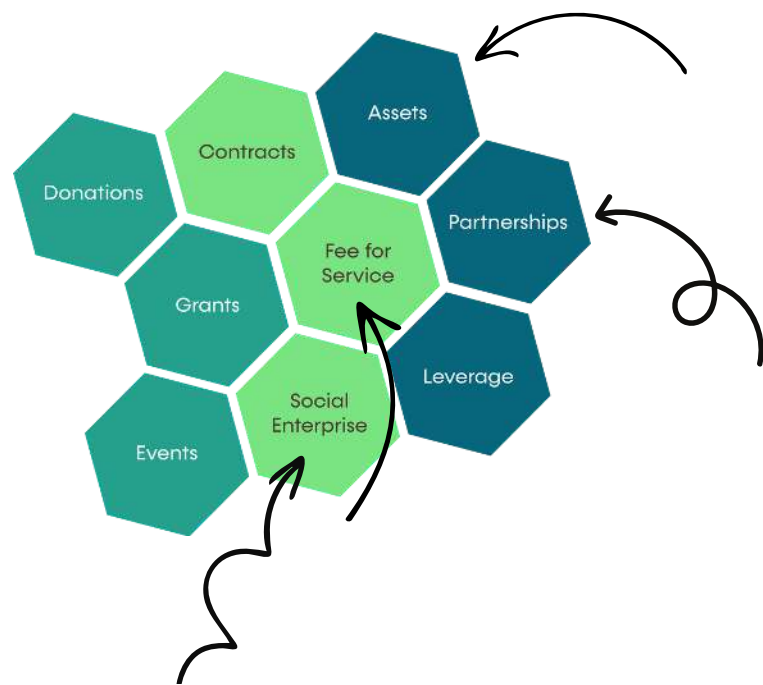
ASSETS

In the early days of the organization, they developed a legacy journal, but it had not been mobilized, leading the team to question how to shift this 'underperforming asset' to become a 'performing asset.'

PARTNERSHIPS

Revenue Goal: generate 20% of revenue by 2024

Before the program, the organization pursued corporate partnerships to provide core funding and volunteer support for their programs. Through the Thriving Non-Profits program, LINKages gained insights on how they might develop meaningful partnerships that would align with the advancing mission, impact, and revenue, creating win-win partnering for both parties. They have several partnership initiatives underway and are in the process of establishing new partnerships that serve this strategic focus area.



Conclusion

Lecot shared that the program exceeded the teams' expectations, as they now see a path forward that makes sense for them and builds on the organization's strengths. Lecot concluded that the team walked away with more than a strategy; they left with new ways of thinking, knowledge, and confidence. They have developed essential skills to realize their potential to be an innovative community leader supporting the needs of seniors to stay connected in the community.

“The concepts, tools, and resources shared during Thriving Non-Profits have become part of our onboarding process for both board and staff. During our regular board meetings, we share a learning moment from the program as a way to revisit the concepts and make visible the connection between revenue, programming, and culture. Today, our team is more confident in our approach, and we are building a space that is entrepreneurial and innovative, allowing people to test ideas and making room to fail, fly, and learn together.”

—Ruby Lecot, Executive Director, LINKages





Thank you to Calgary Foundation for your partnership. Your support makes it possible for equitable access to Thriving Non-Profits to all organizations and helps build financially sustainable organizations that are best able to serve their community.



In the spirit of reconciliation, Calgary Foundation acknowledges the traditional territories of the Blackfoot Confederacy (Siksika, Kainai, Piikani), the Tsuut'ina, the Îyâxe Nakoda Nations, the Métis Nation (Region 3), and all people who make their homes in the Treaty 7 region of Southern Alberta.

Scale Collaborative respectfully acknowledges the 1ək̀wə̀nə̀n-speaking peoples on whose unceded, ancestral, and traditional territories our offices are located and the Songhees and Esquimalt Nations and W̱SÁNEĆ peoples who have historical relationships with the land that continues to this day.

