Final Masters Project

Identifying a long-term sustainable funding model to support upscaling of the WITS Programs

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EXECUTIVE SUMMARY

Bullying is a serious issue in Canada and can have serious negative effects on children, youth, and adults. There are a number of different bullying programs in Canada, but few take a whole-school/community approach to the issue like the WITS programs. The WITS programs are a locally developed (in Victoria) bullying prevention program that aims to create responsive communities by uniting adults and children across the school, family, and community to protect children from peer victimization. The programs are based on dispute resolution techniques such as Walk away, Ignore, Talk it Out, and Seek Help. They emphasize that if children cannot resolve a dispute on their own they should always seek help, whether that be from a teacher, parent, or community member (such as a Police Officer or Firefighter).

The WITS programs were developed over the last 15 years through a collaborative process between the Rock Solid Foundation, a research team from the University of Victoria’s Department of Psychology, and local schools. They have been tested in a variety of settings and are proven to decrease levels of relational and physical victimization. The programs have been largely supported through research grants received through the University of Victoria to evaluate the programs. However, this funding will expire in 2014 and it is unclear what the next steps are. The programs are ready to be scaled up across Canada but this will require resources to support them as demand increases. The Rock Solid Foundation has commissioned this report to answer the following research questions:

Based on the goals and objectives for the WITS Programs over the next 3-5 years and the external funding environment, what is an appropriate long-term sustainable funding model? Specifically:

- investigate how different organizations have developed models to fund and sustain their programs and services over the long-term
- identify resources and organizational frameworks required to successfully scale-up
- explore how different scaling up strategies might require different funding strategies and institutional structures

Methodology

This report uses a multi-method qualitative analysis approach. An environmental scan was undertaken to identify major trends affecting the nonprofit sector and how these could inform the development of a sustainable funding model. Government publications and reports by national organizations like Imagine Canada were used to inform this part of the research.

The second method involved interviewing eight directors of social sector organizations that have successfully developed funding models to grow and sustain their programs or services on a long-term basis. Emails were sent to board members from the Rock Solid Foundation and foundations in Victoria, Vancouver, and Ottawa asking for referrals of organizations. Criteria such as size, services provided, and type of funding were used to narrow down the list.

The final method was a literature review on factors contributing to successful efforts to scaling up. This involved a review of academic journals and periodicals, and a scan of independent research reports and other published documents on specific programs and organizations.
Findings

The environmental scan identified eight major trends driving change in the nonprofit sector forcing organizations to be more strategic in how they operate if they wish to be sustainable. They are:

1. Changing demographics
2. Shifts in nonprofit revenue base
3. Shortage of talented leaders
4. Shortage of volunteers and changing expectations
5. More demand for transparency, accountability, and communication of impact
6. Growing need for transformative partnerships
7. Growing importance and influence of social innovation
8. Increased use of social media and new technologies

The interviews with directors of social sector organizations revealed different approaches to developing sustainable funding models. Some organizations took a business approach to expanding the reach of its programs, while others took a more traditional nonprofit approach of building a donor base to grow and expand its programs. In general, the funding paths were influenced by the services the organization offered, what level of control it needed to maintain to achieve impact, the level of risk the leadership team was willing to take, and the mission and vision of the organization.

The literature review on scaling up revealed different theories about what combination of factors organizations seeking to scale up should focus on. With analysis, five over-arching themes emerged:

1. The need for organizations to develop a focused mission and vision;
2. The importance of distilling the program or service down to its essential elements;
3. The importance of choosing the appropriate scaling up method for your program or service;
4. The need to develop organizational capacity; and
5. The importance of monitoring performance and adapting to new environments.

Discussion

A review of all the findings indicate that a strategic approach to scaling up is needed given the pressure on nonprofits from the external environment, the variety of funding options available to nonprofits, and the many factors which can contribute to successful scaling up. Four different methods or strategies for scaling up were presented in the literature:

1. Uncontrolled diffusion (program spreads on its own)
2. Directed diffusion (program spreads by partnering with local organizations)
3. Takeover (program is given to another organization to disseminate)
4. Organizational growth (the originating organization spreads the program itself by growing)

What method(s) an organization chooses to use to scale up its programs and services will play a large role in determining the type of resources and capacity needed to sustain the effort over the long-term.
Options and Recommendations

The four methods of scaling up presented in the literature were used a point of departure to develop three distinct strategies and options for the Rock Solid Foundation to upscale the WITS programs and to achieve sustainable long-term funding:

1. Takeover model: Find a large national organization to adopt the WITS programs
2. Organizational growth model: Expand the Rock Solid Foundation and branch into new locations
3. Organizational growth/directed diffusion model: Create a national entity and partner locally

These options were assessed against five criteria: readiness, receptivity, resources, risks, and returns, to determine what the best scaling up strategy might be for the Rock Solid Foundation.

It was determined that Option 3: *Organizational growth and directed diffusion model: Create a national entity and partner locally*, would allow the Rock Solid Foundation and WITS programs to achieve the most returns, while requiring only a medium level of risk. Section 11 sets out an implementing plan for Option 3, but recommends that before selecting an option, the Rock Solid Foundation should engage its board and other stakeholders in a discussion on the most appropriate scaling up strategy. Suggestions for additional research are identified in the Concluding section.
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SECTION 1 – INTRODUCTION

Bullying is a serious problem in Canada. According to the World Health Organization’s Health Behaviours in School-aged Children survey Canada ranks 27th out of 35 countries on measures of peer victimization (Craig & Harel, 2004, p.136). Peer victimization is defined as “physical, verbal, or psychological abuse of victims by perpetrators who intend to cause them harm” (Graham & Bellmore, 2007, p.138). Peer victimization includes physical victimization such as hitting or other physical harms and verbal harassment, and relational victimization which consists of purposeful acts such as isolating individuals from social circles or spreading rumours (Crick & Grotpeter, 1996, p.367-68). Peer victimization can have serious long-term negative consequences for both victims and perpetrators including "increased risk for psychosocial and behavioural adjustment problems [which includes] loneliness, low self-esteem, anxiety and depression, externalizing problems, peer rejection, and disengagement from school" (Craig & Harel, 2004, p.133; Leadbeater and Sukhawathanakul, 2011, p.606). In Canada several programs aim to reduce peer victimization in schools, but the WITS programs are unique because they take a whole-school approach to preventing peer victimization in elementary schools. They seek to create responsive communities by uniting adults and children across the school, family, and community to protect children from peer victimization.

The WITS programs have been operating in schools on Vancouver Island for several years and have been shown to reduce levels of physical and relational victimization (Leadbeater, Hoglund, & Woods, 2003; Leadbeater & Sukhawathanakul, 2011). The program developers are currently conducting a randomized control trial in communities across Canada to determine if the program has the same levels of effectiveness in new contexts. The majority of the program components are available through the website and many communities across Canada have begun to adopt the programs. However, there is a question of how to sustain the programs over the long-term as they scale up nationally. For the last several years, the WITS programs have been jointly managed by the Rock Solid Foundation and a team from the University of Victoria’s Department of Psychology led by Dr. Bonnie Leadbeater. The majority of funding to develop and evaluate the WITS programs has come from research grants and contracts received through the University of Victoria. The Rock Solid Foundation is responsible for raising money to finance the resources (books, lesson-plans, and promotional materials) needed to implement the WITS programs in schools across the country. Rock Solid raises money to fund program materials through public and private grants, private donations, and membership fees.

Until now UVic and the Rock Solid Foundation have managed to raise enough funds to develop and evaluate the WITS programs and to supply schools that need it with the materials to implement the programs. However, the evaluations that the UVic research team have been conducting are coming to a close; after 2015 the programs will no longer receive research funding from the federal government. To provide support and material to existing WITS schools and to grow the programs to reach more schools across Canada, the Rock Solid Foundation needs to secure funding on a much larger scale than it has to date. The majority of Rock Solid’s funding has come from small grants which require a large investment of time to apply for and report on, and there is a concern that securing more funding from these sources will take time away from program development. The Foundation is interested in learning more about what other organizations have done to finance the growth of their social service programs and what is required to successfully scale up.
This project seeks to answer the following research questions:

*Based on the goals and objectives for the WITS Programs over the next 3-5 years and the external funding environment, what is an appropriate long-term sustainable funding model? Specifically:*

- investigate how different organizations have developed models to fund and sustain their programs and services over the long-term
- identify resources and organizational frameworks required to successfully scale-up
- explore how different scaling up strategies might require different funding strategies and institutional structures

The objective of this project is to outline two to three options for the Rock Solid Foundation to scale up the WITS programs and financially support the programs over the long-term, and make a recommendation as to which option it should move forward with. The recommendation will be informed by a methodology that includes an extensive review of the WITS programs development to-date, an environmental scan of the nonprofit climate in Canada, interviews with directors of social sector organizations that have managed to grow and sustain their programs and services over the long-term, and a review of the literature on scaling up.

This report is organized as follows: section 2 provides background on the development of the WITS programs and what the next stage is; section 3 presents the conceptual framework guiding the report; section 4 outlines each of the methods used in this study and concludes with a review of the strengths and weaknesses of the methodology; section 5 details the findings of the environmental scan and identifies eight major trends driving change in the nonprofit sector; section 6 provides case studies of eight nonprofits that have successfully developed funding models to grow and sustain its programs or services; section 7 reviews the literature on scaling up and develops a conceptual framework of what factors contribute to success; section 8 discusses the findings of the report; section 9 revisits the conceptual framework with the findings from the report; section 10 outlines three options for the Rock Solid Foundation and recommends an option for moving forward; and section 11 provides an implementation strategy for the recommended option.
SECTION 2 – BACKGROUND

This section details why the WITS programs were created, what the program components are, and how the program has developed over the past 15 years. There have been three distinct phases of development for the WITS programs: 1) developing the program components and testing to see if they work; 2) further program development and testing the program in broader contexts and real world conditions; and 3) testing the program in new contexts where awareness of the program is not pre-existing (i.e. randomized controlled testing) and beginning to disseminate the program across Canada.

Understanding how the programs have developed and spread to-date is an important component in determining how the program should move forward because it provides insight into what approaches have been successful in the past.

2.1 The Genesis of the WITS Program - A Collaborative Approach

The Rock Solid Foundation and the WITS programs were created in response to an increase in youth violence in the Greater Victoria Capital Regional District. In 1997 Tom Woods, a local school police liaison, launched the Rock Solid Foundation with a group of local athletes and law enforcement officials. Their goal was to provide education programs to children and youth to curb the number of violent crimes amongst youth.

The WITS acronym, which stands for Walk away, Ignore, Talk it out, and Seek help, became a part of Rock Solid’s education programs after Tom heard about its use at a local elementary school and he approached principal Judi Stevenson to see if she would be interested in working with the organization to develop an anti-bullying program.

In 1998 Dr. Leadbeater of the UVic Department of Psychology and a team of researchers joined the group to help develop, implement and evaluate the WITS program. The program was developed over the next few years through a community-based approach between the Rock Solid Foundation, School District #61 teachers and counselors, and the UVic research team.

2.2 Program Components

WITS is an open-source program, with the majority of the components available free of charge from the WITS website (www.witsprogram.ca). These include:

- Promotional material like posters, pamphlets, and videos
- A full resource guide that explains the programs
- Lesson plans for teachers that accompany recommended books
- Online training modules for teachers and community members
- Information for parents and children about bullying (including cyber-bullying)

The components of the program that are not free are the recommended books that reinforce the WITS messages and promotional resources like WITS badges, pencils, rulers, and magnets. Schools or community members can order promotional resources directly from the Rock Solid Foundation at cost (they order in bulk) and can also order hard copies of promotional material like posters and pamphlets. Some of the recommended books can be ordered through Rock Solid, but the majority are also available from Amazon or Scholastic.
In some instances the Rock Solid Foundation is able to secure grants to cover the costs of program setup (buying recommended books, printed material, and promotional resources) which makes the program very low cost for schools. Schools that receive this initial setup package are charged an annual $100 membership fee to maintain ongoing commitment to the program and only have to order additional promotional resources when needed. All schools using WITS are able to access support by emailing or calling the Rock Solid Foundation. Appendix 1 provides a logic model of all the inputs of the program.

2.3 Phases of Program Development

Today, the WITS programs have been introduced in over 250 schools and have been proven to decrease rates of relational and physical victimization and increase levels of social responsibility (Leadbeater & Sukhawathanakul, 2011, p.617). The path to development has been long and rigorous, but it has paid off, and the WITS Programs are considered a proven evidence based program.

The development of the WITS programs can be broken down into three distinct phases: 1) Initial program development and testing in ideal conditions to see if it works (i.e. testing for efficacy); 2) Further program development and testing the program in a broader context and in more real world conditions (i.e. testing for effectiveness); 3) Testing the program in new contexts where awareness of the program is not pre-existing (i.e. randomized controlled testing) and beginning to disseminate the program across Canada. Appendix 2 provides an overview of the three phases of development and major milestones.

It is important to understand what the process has been to bring the WITS program to its current stage as this can provide insight into what strategies have worked in the past and what resources will be required to support the programs as they continue to scale up.


After establishing the program components through a collaborative community-based approach between the Rock Solid Foundation, School District #61 teachers and counselors, and the UVic research team, the WITS program were tested for efficacy. The first evaluation study of the WITS program took place between 2000-2003 and involved eleven program schools and six control schools from School District #61. The evaluation was quasi-experimental with schools volunteering to take part in the study rather than being randomly selected. At the end of the three year study all the program schools showed a decrease in relational victimization and physical victimization. Control schools considered to be low poverty (3-10% of students on income assistance) also showed a decrease in peer victimization but at a slower rate than the program schools, while, high poverty control schools (11-24% of students on income assistance) showed an increase in peer victimization. The results of the first evaluation study demonstrated that the WITS program worked to decrease instances of peer victimization.

During this first phase the WITS program spread mostly through word of mouth and through direct contact by the Victoria and Saanich Police and the RCMP in Sooke. Tom Woods played an important role in disseminating the program by recruiting local community service members (Police Officers and Firefighters) to introduce the programs in schools in their area. The UVic research team also played a role in dissemination by developing a partnership with the Centre for Youth and Society.
Phase 2 (2004-2009)

In 2004 the UVic department of Psychology received $20,000 from the American Psychological Foundation to develop a second step to the WITS program, WITS LEADS. The LEADS program was created through a collaborative process between the Rock Solid Foundation, and Frank Hobbs and Lake Hill Elementary Schools. LEADS stands for Look and Listen, Examine choices, Act, Did it work, and Seek Help, and is designed to provide more advanced problem-solving strategies for students in grades 4-6.

A second quasi-experimental evaluation of the WITS program was conducted from 2006-2008 with six program and five control schools in Greater Victoria School District #61. Again, findings showed that rates of decline in physical and relational victimization were significantly greater in program than control schools. Teachers at program schools also reported higher average levels of social responsibility among students at the end of the study, compared to control schools.

By 2008 the WITS program were introduced in most schools in Greater Victoria and the Sooke School Districts. The Rock Solid Foundation had also started to receive some interest in the programs from other BC schools outside these districts. The UVic research team continued to build partnerships during this phase and was one of the first members of the newly created PREVNet in Ontario. PREVNet was established as a Network of Centres of Excellence and brought together leading research scientists and youth-serving organizations to develop programs to address bullying.

Phase 3 (2010-Present)

In 2010 the UVic department of Psychology received a grant from the Public Health Agency of Canada (PHAC) to upgrade its website and create a promotional video for the WITS programs. The updates were completed that year and included the addition of an online training component, online resources including learning plans and a resource guide, and printable promotional material. A twitter, facebook, and pinterest account were also launched in the last couple of years.

In 2011 PREVNet became an NCE Knowledge Mobilization program with a mandate to co-create 10 sustainable Knowledge Mobilization Projects. WITS was chosen as one of these projects and a pilot project was launched in partnership with the RCMP National Youth Officer Program in the same year. The purpose of the pilot project was to study the programs in rural communities across Canada. The study wrapped up in 2012 and a summary report identified five recommendations for future program implementation in rural communities based on the findings of the study. The recommendations are to: 1) assess community needs before implementing; 2) obtain clear support from the RCMP National Office and Divisional Commanding Officers; 3) support collaboration among RCMP Members and Key Community Advocates; 4) post contact lists of experienced WITS Members on the RCMP Youth Resource Centre's Public Website; and 5) identify existing and needed markers to measure impact of the WITS programs.

The study also found that there was a need for materials in French for immersion schools and Francophone communities. As a result, a French language version of the WITS programs, DIRE and MENTOR, were developed and the components of the French programs are currently being tested in schools in BC and Quebec.

In 2011 the UVic research team received a second grant from PHAC to conduct randomized control trials of the WITS programs in 27 schools in Alberta, Ontario and New Brunswick, to conduct a qualitative evaluation of uptake, implementation, and sustainability in seven rural BC schools, and to widely
disseminate the program across Canada and document effective dissemination strategies. The UVic research team has partnered with Edmonton Safe and Caring Schools and Communities (SACSC), Carleton University, the University of Ottawa, and the Canadian Principal’s Association in New Brunswick to recruit schools to participate in the randomized control trial and collect data. The final data results are currently being analyzed.

**Phase 4 (2014-?)**

The next phase of development will be developing a plan to sustain the WITS programs over the long-term and continue to scale up nationally. There are different ideas within the Rock Solid Foundation and the UVic research team as to how to sustain the programs. Some of the ideas that have been proposed are giving the program to the RCMP to scale up, finding a national sponsor to fund the growth of the program, and selling the program outside of Canada to generate additional revenue to support the growth of the program nationally. At this time it is not clear what the best method is to support the programs on a national scale. This project seeks to answer these questions.

2.4 Conceptual Framework

The WITS programs have come a long way since its initial use at Lampson Elementary school. Over the course of several years the programs have expanded to include multiple components, a french program, and online training/resources. The programs have also spread from Victoria to as far away as the Yukon. The programs are now at a critical stage where they are starting to scale nationally and need to develop a funding model to support this continued growth.

The conceptual framework for this report (Figure 1) is based on the phases of development of the WITS programs and seeks to present options for the Rock Solid Foundation to support the WITS programs as it introduces the programs in new locations across Canada and continues to grow and develop the programs.
SECTION 3 - METHODOLOGY

This research project relies on a variety of qualitative methods including an environmental scan, a review of nonprofit funding best practices, and a literature review of scaling up methods. Together this information will help inform a recommendation for how the Rock Solid Foundation should proceed with scaling up and establishing sustainable funding. This section outlines each of the methods used in this study and concludes with a review of the strengths and weaknesses of the methodology.

3.1 Environmental Scan

The objectives of the Environmental Scan were to identify trends impacting the nonprofit sector and develop an understanding of what this could mean for developing a sustainable funding model to support scaling up. The scan began with searching the websites of national support organizations for nonprofits like Imagine Canada and Charity Village to find articles and publications on nonprofit trends in Canada. This led to the identification of several formal and informal publications that in turn pointed to other resources. Publications by Stats Canada were also searched, as was the website for the Voluntary Sector Initiative. The UVic library catalogue was used to track down articles identified by other publications. One challenge involved finding articles published in the last few years. A lot of research was done on the state of the voluntary and nonprofit sector in the early 2000s, but publications become scarcer after 2007. However, many of the trends identified in more recent reports were also identified in publications from the early 2000s suggesting that many of these challenges have been building for at least a decade.

3.2 Interviews

The objective of the interviews were to speak to representatives of social service providers which receive the majority of their revenue from sources other than project grants.

Several sources were used to identify potential candidates. E-mails were sent to the United Ways of Greater Victoria, Vancouver, and Ottawa, the Victoria Foundation, the Vancouver Foundation, and the Trillium Foundation, asking for recommendations of organizations that have successfully maintained long-term sustainable funding through innovative partnerships, earned income strategies, corporate sponsorship, and/or some other model. In addition, government websites like the Public Health Agency of Canada’s “Preventing Violence” website and the BC Government’s “ERASE” bullying website were explored to find examples of programs similar to WITS that might be using innovative funding models. Finally, case studies were found on websites like Enterprising Non-profits and Vancity’s Social Enterprise and Social Venture spotlight.

The criteria that were used to determine the final list of potential interview candidates were:

- **Services provided**: Emphasis was placed on organizations that provide education and services to children, youth and/or families.
- **Size**: For the most part organizations were limited to small to medium sized (less than 20 employees) to ensure comparability with Rock Solid’s organizational capacity.
- **Timeline**: Organizations had to have been around for at least 10 years to demonstrate sustainability.
- **Reach**: Looked for organizations that have started small and succeeded in growing their programs/services.
- **Country of origin**: Canada, US, or Australia
- **Type:** Organizations did not have to be a nonprofit they just had to provide a social service.
- **Funding model:** Tried to identify organizations with varying types of funding models to ensure a broad overview of available funding models.

The interviews were structured with a consistent set of questions and conducted either in person, over the phone, or via Skype. Of the 19 organizations contacted, eight representatives were interviewed. One organization did not meet the interview criteria (too new), two were too busy, and eight did not respond to requests for an interview. Questions (see Appendix 3) were sent to participants at least one week prior to scheduled interviews. Interview responses were recorded by hand and typed up shortly after interviews were conducted. The typed recorded responses were sent to interview recipients for review to ensure accuracy. Any corrections or additions were incorporated into the final responses.

### 3.3 Literature Review

The goal of the literature review was to develop a framework of understanding of what elements and conditions contribute to successful scaling up. The research involved a review of academic journals and periodicals, as well as a scan of independent research reports and other published documents on specific programs and organizations.

The sources that were used to find articles were:

- Summon @ UVic Libraries
- Academic Search Complete
- Google Scholar

Articles were also identified by looking at the reference section of useful articles and performing a general ‘Google’ search. A variety of search terms were used to identify a broad spectrum of literature, including: “Scaling Up”; “Scaling Impact”; “Going to Scale”; “Policy Transfer”; “Lesson-Drawing”; and “Smart-Practices”. The literature turned up a wide variety of elements and conditions that contribute to successful scaling up so an Excel table was constructed to analyze the different theories and determine common themes.

### 3.4 Strengths and Limitations of Methodology

A limitation of this project was time. The project was originally commissioned for four months and was extended twice (1 month each time), for a total of six months. The timeline of six months did not allow for an extensive review of sustainable funding models in Canada, the US, and Australia. For the most part interviews were limited to organizations in the Victoria or Vancouver area because more information was available on these organizations. Despite this limitation, a thorough research process was used to identify organizations to interview and criteria were developed to help ensure the organizations chosen would provide the most relevant information for the Rock Solid Foundation.

The strengths of this report are that several different methods were used to develop an integrated response to the research questions. The environmental scan provides a macro perspective of the issue and helps develop a better understanding of the environment that the Rock Solid Foundation is operating in. The interviews explore the issue on a more micro level by seeking to understand what funding models successful nonprofits use and what resources are required to maintain them. Finally, the literature review helps round out the issue and understand the factors that lead to successful scaling up beyond just securing funding.
SECTION 4 – SCAN OF CANADA’S NONPROFIT ENVIRONMENT

The purpose of this section was to explore trends affecting the nonprofit sector to gain a better understanding of how these could affect scaling up efforts and long-term sustainable funding. The first part of the section looks at the role of the nonprofit sector in Canada to provide a context in which the trends are occurring. The second part of this section identifies eight major trends affecting the nonprofit sector and how these will impact nonprofits. The final part of this section summarizes how the trends identified are impacting organizations capacity to achieve their mission.

4.1 Overview of Canada’s Nonprofit Sector

Nonprofits have historically played an integral role in Canadian society. The nonprofit sector employs roughly 12% of the population and accounts for 7% of the GDP (Community Social Planning Council [CSPC], 2013, p.6). Nonprofits provide a variety of services and programs to Canadians including health, arts, culture, social, and educational.

In Canada the two main distinctions between nonprofits are those that are registered charities and those that are not. Charities are registered through the Canada Revenue Agency and are subject to the regulations of the Income Tax Act. To qualify as a registered charity an organization must be: a resident in Canada, established and operated for charitable purposes, and must devote its resources to charitable activities (Canada Revenue Agency [CRA], 2012). Registered charities are eligible for government tax incentives including GST exemptions and tax receipts for donations. As of December 31, 2009 there were 85,229 registered charities in Canada (CRA, 2010).

Nonprofits in Canada have a long relationship of cooperation with the government beginning in the 1900’s when small grants were given to organizations to support services to vulnerable populations such as orphanages, schools and group homes. Following the second world war government support to nonprofits expanded and the 1960-80’s saw huge growth in this sector with the introduction of the Canada Assistance Plan and changes to the federal tax system that provided indirect financial assistance to organizations involved in promoting aspects of Canadian identity (Scott, 2003b, p.14).

Government still plays a large role in supporting nonprofits today, accounting for roughly 60% of total nonprofit revenues by either direct (grants, contributions, or contracts) or indirect (tax rebates and credits) assistance (CSPC, 2013, p.6; Scott, 2003b, p.15). However, government funding to nonprofits at all levels is beginning to change due to fiscal constraints which is forcing nonprofits to look for funding elsewhere.

4.2 Nonprofit Trends in Canada

Nonprofits are facing significant challenges in the 21st century. Reductions in government transfers starting in the 1990’s have forced many nonprofits to diversify their revenue sources, requiring them to devote more resources to fund development. The 2008 global recession has led to reductions in donations from both the private and public sector. The recession has also increased demand for many social services and has strained already scarce nonprofit resources. Rapid technological innovation has significantly improved channels of communication and the next generation of supporters are looking for instant feedback, meaning that nonprofits must learn to successfully navigate new technology if they want to stay engaged.
The 2010 Imagine Canada report, *A Framework for Action for the Nonprofit Sector*, identifies eight major trends driving change in the nonprofit sector: changing demographics; shifts in nonprofit revenue base; shortage of talented leaders; shortage of volunteers and changing expectations; more demand for transparency, accountability, and communication of impact; growing need for transformative partnerships; growing importance and influence of social innovation; and increased use of social media and new technologies.

**Changing demographics**

The major demographic changes occurring in Canada are: an aging population; increased immigration leading to more multicultural communities; migration of populations from rural to urban; and a rapidly growing Aboriginal population (Imagine Canada, 2010, p.5; Mulholland, Mendelsohn, & Shamshiri, 2011, p.4). What this means for the nonprofit sector is that there will be increased demand for services, as well as demand for new services not currently provided (Brothers & Sherman, 2012, p.159). As the population ages there will be an increased need for senior services. In rural communities, where younger generations are leaving to pursue work elsewhere, there is a risk that there will not be enough working age population to fill the growing needs of the social sector (Imagine Canada, 2010, p.6). Rapid population growth in Aboriginal communities means there will be increased demand for new services that meet the unique education, cultural and social needs of the population (Imagine Canada, 2010, p.6). Finally, increasingly diverse communities will need new services that address cultural needs and help integrate new immigrants. These demographic changes will have a profound impact on how nonprofits choose to develop new programs and deliver services in the future.

**Shifts in nonprofit revenue base**

Federal and provincial governments in Canada are under increasing pressure to cut costs which has resulted in significant reductions in public sector funding (CCSD, 2006, p.12; Imagine Canada, 2010, p.8; Vancouver Foundation, 2010, p.13). Traditionally, governments have been one of the main sources of funding for nonprofits, and many nonprofits rely solely on government funding to provide their services and programs. For many organizations funding cuts have left them searching for new sources of revenue to make-up the shortfall, which requires additional resources and expertise, or cutting services to reduce costs. Unfortunately, the trend of reduced government funding is not expected to reverse anytime soon and many are predicting further reductions in the future (Brothers & Sherman, 2012, p.77; Lasby & Barr, 2012, p.8).

In addition to reducing funding, governments and many other public funders have changed the way they provide funding. Instead of providing grants for general operating expenses, governments have shifted to providing funding on a contractual or project basis. Contracts require nonprofits to compete against each other and sometimes even private sector organizations to secure contracts to provide services. Project funding is given on short-term basis for a specific project or program. Usually, project funding does not include core expenses (administration costs) so nonprofits often have to find additional funding to cover basic costs. The rationale for these shifts is that contract and project funding allows governments with limited resources to: target funding to their policy priorities; better track the impact of projects; and monitor organizational performance (CCSD, 2006, p.19; Scott, 2003a, p.8). For nonprofits these changes have created a complicated web of application procedures and onerous reporting requirements, taking administrative resources away from program and organizational development (Scott, 2003b, p.98).
Private funding bodies, such as banks and large corporations, have also changed the way they give money. In the past private institutions donated money to causes that aligned with their business goals to increase their visibility in the community and attract new customers. However, public scrutiny of corporate responsibility has increased and many private funders are looking for nonprofit partners that will allow them to have the greatest impact (Clarke, 2011, blog post). Corporations are still looking to get the most return for their money in terms of sponsorship, but they are also being more strategic about the organizations they align with and are looking for organizations where they can be more directly involved and where there are demonstrated concrete results (Clarke, 2011, blog post; Gadeski, 2011, p.18).

As a result of these recent funding shifts, many nonprofits are turning to social enterprise as a solution. The Canadian Social Enterprise Guide published by enterprising nonprofits describes four major reasons for the increase in popularity of social enterprises: “[1] the understanding that there are some needs the market will never meet on its own; [2] the opportunity to advance mission-related goals; [3] diminished and changing nature of government funding; and [4] the promise of social enterprise as a vehicle for social innovation” (Enterprising Non-profits, 2010, p.4). There are many different definitions of social enterprise, but in general it is a commercial enterprise (business) operated by a nonprofit whereby a nonprofit sells a product or service for a fee and then uses the revenue to achieve a social, cultural, or environmental value (Enterprising Nonprofits, 2010, p.16). In Canada nonprofits and charities are only allowed to run related businesses (a business directly related to the mission) or a business largely run by volunteers (CRA, 2003) which can be problematic for some organizations. This shift toward earned income is being supported by many provincial governments who are looking for ways to fund the social sector without spending government funds (example is the BC Government’s Bill 23 to create community contribution companies - BC Newsroom, 2012).

**Shortage of talented leaders**

There are two trends that are contributing to a shortage of talented leaders in the nonprofit sector, one is the inevitable retirement of baby boomers, and the other is the discrepancy of pay between the private sector and nonprofit sector. Just as the need for well qualified, strong leaders is growing, supply is dropping because many baby boomers are preparing for retirement (Crutchfield & Grant, 2012, p.199). Historically, salaries for nonprofit leaders have been significantly lower than their private sector counterparts making it hard to attract top talent (Bradach, Tierney & Stone, 2008, p.97). In the past, leaders of nonprofits were often driven by a sense of mission and were willing to accept a lower pay to work towards something they believed in, but this mentality is changing and the next generation of leaders does not seem as willing to compromise and are looking for equal pay for equal work (Imagine Canada, 2010, p.8). If nonprofits want to attract the best and the brightest and be successful in the increasingly competitive nonprofit sector they will need to find ways to adequately compensate Executives and other top level staff (Bradach, et al., 2008, p.97).

**Shortage of volunteers and changing expectations**

Just as the next generation of nonprofit leaders are not willing to settle for less, the expectations of the next generation of volunteers are also high. The current pool of volunteers reports being stretched to the limit and if nonprofits want to attract new volunteers they are going to have to change how they think about the practice (Imagine Canada, 2010, p.10). Many younger volunteers are looking for opportunities to advance their skills, while baby boomers are looking for a more personalized experience (Imagine Canada, 2010, p.10). More meaningful volunteer opportunities will require skilled personnel that are able to meet the demands of multiple interest groups (Imagine Canada, 2010, p.10).
**More demand for transparency, accountability, and communication of impact**

There are several factors contributing to the need for nonprofits to be more transparent, accountable and demonstrate impact. First, funders are working with less money so they want to make sure they are investing their resources wisely and are achieving the greatest impact (Bernholz, 2012, p.18). Second, the public has become increasingly skeptical of public institutions, requiring governments to demonstrate the impact of their policies and align with organizations that demonstrate accountability and transparency (CCSD, 2006, p.18 & 23). Finally, there is increasing competition for scarce resources forcing nonprofits to look for ways to stand out and one way to do this is by being transparent and demonstrating accountability to funders (Hall et al., 2003, p.19). Increased need for transparency and accountability requires that nonprofits invest in better training for staff, efficient systems of reporting and tracking data, and developing strategies to communicate impact.

**Growing need for transformative partnerships**

Nonprofits have always been good at partnering with other sectors to mobilize resources, generate increased attention to causes, and come up with innovative solutions to difficult problems, and this skill will only become more in demand in the future (Imagine Canada, 2010, p.12). As resources become scarcer it is becoming more and more important for nonprofits to collaborate with each other to share costs, streamline services, and ultimately achieve greater impact. Some funders are already showing a preference for joint submissions because it allows them to have a greater impact while limiting the amount of funds they distribute (Scott, 2003(a), p.4). In some instances partnerships will lead to an organization foregoing its own existence if its mission can be better served by an existing organization (Imagine Canada, 2010, p.13).

**Growing importance and influence of social innovation**

In recent years governments have come to recognize the importance of social innovation in ensuring the “competitiveness and well-being of the nation” (Imagine Canada, 2010, p.6). Nonprofits have the potential to play a significant role in increasing social innovation because they have a history of partnering with other sectors to solve complex problems and increase impact/reach (Imagine Canada, 2010, p.7). There is growing recognition in all sectors that the status-quo is not working to solve large social problems like homelessness and that it will require joint efforts from the public, private and nonprofit sector to address all the aspects that contribute to these issues (Tansey, 2011, p.4).

**Increased use of social media and new technologies**

Technology has changed substantially in the past 20 years and many nonprofits are struggling to stay up-to-date with trends due to resource constraints, lack of technical know-how, and competing priorities. However, technology and social media have now become such an integral part of communities that nonprofits cannot afford not to engage in this arena (Imagine Canada, 2010, p.14; Shand, 2012, blog). The next generation of donors expects current information 24/7 and will lose interest in causes that do not engage with them.

Technology is also changing the face of fundraising and volunteering. It is predicted that the next generation will make smaller, more frequent donations; often sparked by a social network request (Bernholz, 2012, p.7). Mobile giving (donating small amounts through one’s cell phone carrier by texting a designated number), crowd-funding (use of small amounts of capital from a large number of individuals to support efforts initiated by another individual or organization), and fundraising blasts (impromptu calls for donations or volunteers using social media platforms) mean that local projects can
be initiated without the help of any formalized institutions (Bernholz, 2012, p.7). These new fundraising platforms will compete with traditional forms of fundraising and if nonprofits wish to attract the next generation of donors they will need to learn how to generate the same enthusiasm and connectivity promoted by free-lance do gooders (individuals who raise money for a cause with no affiliation to an organization).

4.3 How Trends are Affecting Nonprofit Capacity

Together these trends are having a significant impact on nonprofit capacity. Nonprofit capacity is defined as all the elements that support the organization in achieving its mission. In the book *Strengthening Nonprofit Performance*, Connolly and Lukas (2002) break down organizational capacity into six components that are critical for high performance:

- Mission, vision and strategy are what give the organization purpose and direction. Program delivery and impact are the organization's reason for being.
- Strategic relationships, internal operations and management, and finance all contribute to achieving the organization's mission.
- Governance and leadership are what keep the organization on track towards their goals.

If any of these components are underdeveloped or not performing at optimum levels the organization's performance and ultimately its impact will decrease. The figure below shows how the environmental trends identified in this section are having an impact on every component of organizational capacity, making it hard for organizations to achieve their goals and objectives.

![Figure 2](image-url). Influence of environmental trends on nonprofits' organizational capacity.
SECTION 5 – INTERVIEWS: SUSTAINABLE FUNDING MODELS

The purpose of the interviews was to speak with directors of organizations that have successfully managed to grow and sustain its programs and services over the long-term in order to learn more about how the organization is funded. The interview questions were mostly focused on funding and aimed to find out:

a) what type of funding the organization relied upon
b) the pros and cons of this type of funding
c) what resources are needed to maintain this type of funding

The interviews were conducted with eight directors of social sector organizations in Victoria, Vancouver and Australia. All of the organizations interviewed delivered programs to children, youth or parents in some capacity and had been around for at least 10 years (details of each of the organizations are listed in Table 1). The interview candidates were chosen based on referrals from local funding organizations and board members of the Rock Solid Foundation.

Table 1. Characteristics of the Organizations Interviewed

<table>
<thead>
<tr>
<th>Name of Organization</th>
<th>Head Office Location</th>
<th>Size of Organization</th>
<th>Services Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pathways Health &amp; Research Centre</td>
<td>Queensland, Australia</td>
<td>15-20 Full-time employees (FTE)</td>
<td>Sell licensing and training of the FRIENDS for Life program, as well as individual and group therapy programs.</td>
</tr>
<tr>
<td>Parenting &amp; Family Support Centre and Triple P International</td>
<td>Queensland, Australia</td>
<td>Approx. 450 employees between the 2 organizations (F/T &amp; P/T)</td>
<td>The Support Centre conducts research and evaluation of Triple P. Triple P International sells training, accreditation and resources for Triple P.</td>
</tr>
<tr>
<td>Fernwood Neighbourhood Resource Group</td>
<td>Victoria, BC</td>
<td>25 FTE’s 20 P/T /contract</td>
<td>Run community programs and services, and manage 10 units of affordable housing and the operations of the Cornerstone Cafe.</td>
</tr>
<tr>
<td>Dream Rider Theatre</td>
<td>Port Moody, BC</td>
<td>Approx. 4.5 FTE</td>
<td>Interactive plays and programs about environmental sustainability to elementary school kids.</td>
</tr>
<tr>
<td>South Island Dispute Resolution Centre</td>
<td>Sooke, BC</td>
<td>2 FTE 12 contractors</td>
<td>Dispute resolution training and workshops.</td>
</tr>
<tr>
<td>Big Brothers of Greater Vancouver</td>
<td>Vancouver, BC</td>
<td>95 FTE split among 3 organizations</td>
<td>Mentoring services for youth and skills training.</td>
</tr>
<tr>
<td>James Bay Community Project</td>
<td>Victoria, BC</td>
<td>3 FTE 19 P/T /contract</td>
<td>Programs and services for parents, youth, and seniors in James Bay.</td>
</tr>
<tr>
<td>Power to Be</td>
<td>Victoria, BC</td>
<td>19 FTE</td>
<td>Outdoor recreation programs for children with disabilities or at risk.</td>
</tr>
</tbody>
</table>

5.1 Pathways Health & Research Centre: Selling program licenses internationally

Pathways Health & Research Centre (Pathways) is a health and research clinic in Australia that specializes in programs to treat anxiety and depression. Pathways was founded by Dr. Paula Barrett, who is responsible for developing the FRIENDS anxiety prevention programs for children and youth. Pathways provides individual and group therapy programs, training for the FRIENDS programs, and resources for the FRIENDS programs.
Pathways generates its revenue by selling licenses to the FRIENDS program to organizations and individuals around the world, and through its therapy programs offered at the Pathways Health and Research Centre. FRIENDS is based on a train-the-trainer model and license holders must undergo in-person training at Pathways in Australia before they can become accredited FRIENDS facilitators. Once accredited, facilitators can train FRIENDS practitioners (such as teachers) to implement the programs in their communities. The benefits of buying a license are that individuals are recognized as international FRIENDS facilitators that can train others, they receive a discount on FRIENDS resources and supplies, and they are able to receive support from Pathways. On top of the initial licensing fee, license holders are required to pay annual royalties to Pathways to maintain access to program materials, resources, and support.

There are a couple of challenges with this funding model. One is dealing with fluctuating demand for the program. Demand is highly influenced by the economy and the organization must constantly be demonstrating the effectiveness and distinctiveness of its programs in order to attract new license holders. A lot of the directors time is spent doing sales. Another challenge with this funding model is that there is not a lot of additional revenue to put towards ongoing program development (profit margins are fairly low), and because it is a private business they cannot access additional sources of income like grants to help with this.

The benefit of it is that the organization is able to reach a wider audience by selling the program than if they were to provide it for free. While the program does not generate a substantial profit, the price of the license and training is enough to cover costs so Pathways does not have to find this money externally which would limit its supplying capacity.

The success of the FRIENDS program is largely due to Dr. Barrett’s international presence. Dr. Barrett is considered an expert in her field and attends speaking events and conferences around the world and is the face of the program. Her public engagements serve to generate interest in the program and have helped create an international network of supporters for the FRIENDS programs.

5.2 The Parenting & Family Support Centre: Developing a successful business

The Parenting & Family Support Centre is located in the University of Queensland and is responsible for researching, developing, and evaluating the Triple P – Positive Parenting Program (Triple P). Triple P is a “parenting and family support system designed to prevent – as well as treat – behavioural and emotional problems in children and teenagers” (Triple P – Positive Parenting Program, n.d., ‘Triple P in a Nutshell’). The Parenting & Family Support Centre generates revenue for its work mostly through research grants, but it also receives a share of the royalties from the international sale of Triple P. Triple P is sold by an independent business, Triple P International, that has a license from the University of Queensland (who owns the copyright to Triple P) to disseminate the program. Triple P International pays annual royalties to the University who distributes the money within its departments.

Triple P International was established in 2001 by a local venture capitalist after the University of Queensland realized it did not have the in-house capacity to scale up Triple P itself. Triple P International is responsible for marketing the program, conducting Provider Training Courses, and publishing Triple P resources. There are five levels of Triple P Provider Training Courses based on different levels of intervention. Training courses are offered in locations around the world, but courses must meet a minimum registration threshold before they are confirmed. Practitioners become accredited when they have completed the training course, scored 80% or higher on a multiple choice test, and complete an
accreditation workshop where they must demonstrate proficiency in selected competency areas. Triple P International also offers private group training courses for organizations or government departments that wish to have more than one individual accredited.

The Triple P funding model is seen as an example of a successful sustainable funding model by many because it allows all stakeholders to have their needs met:

- the developers and researchers receive a portion of the royalties;
- the University receives free publicity and a share of the royalties;
- the business makes a modest profit and is staffed by employees who believe in what they are doing and are invested in the success of the business; and
- clients receive a program that has proven success at a reasonable cost.

One of the main challenges for the organization is dealing with critics and competitors. As the program has become more well-known and successful, it has become a target for competitors. Triple P International must constantly be prepared to address criticism and false claims in order to protect the integrity of the program.

There are several factors that have contributed to the success of Triple P. By partnering with research organizations in each new location the Parenting & Family Support Centre has developed strong collaborative relationships that have helped it spread the word about the program and adapt the program for new contexts. Before introducing the program to new countries it establishes a local evidence base which not only helps ensure the programs are appropriate for that environment but it also helps create awareness. It is constantly updating and revising the programs based on new evidence and have built-in outcome measurement systems which allows it to monitor effectiveness. In addition, the Parenting & Family Support Centre holds a conference every year to share information and best practices with Triple P partners around the world. Finally, the University has clear rules around copyright and intellectual property rights which means there is no confusion around who is entitled to what portion of revenues.

5.3 Fernwood Neighbourhood Resource Group: Self-sufficiency by taking risks

Fernwood Neighbourhood Resource Group (Fernwood NRG) began as a community organization dedicated to managing the local community centre. In 2004 the Fernwood community faced some major issues and Fernwood NRG decided to take an active leadership role, holding an open-space visioning forum to determine the future of the community. Based on the issues and concerns identified by neighbourhood residences, Fernwood NRG drafted a set of Principles and Values that would guide the organization as it sought to address community issues. Some of the main concerns identified by community members were: lack of community owned businesses; no community meeting space; and a run-down town centre.

In 2006 Fernwood NRG purchased the Cornerstone Building in the heart of Fernwood (by trading a property that had been endowed to them for the building) and began fixing it up. By early 2007 the organization had opened the Cornerstone Café (a coffee shop), the Cornerstone Apartments (4 affordable housing units for families), and two commercial properties for lease. In 2008 it bought two additional properties to provide affordable housing for six more families in the community. Today the organization is responsible for managing the operations of the Cornerstone Café (the Cafe is owned by a separate entity for legal purposes), managing 10 units of affordable housing, managing childcare, education and training programs out of the community centre, publishing a local newspaper (the Village
Vibe), managing two commercial properties, organizing a number of community events including FernFest, and partnering with local organizations to provide community programs.

The organization has a very diverse funding base and is working towards becoming a financially self-reliant organization (one of its core Principles and Values). Its main sources of funding are: grants (which include government contracts); childcare and program fees; rental income from low income housing; and donations & events (including a yearly donation from the Cornerstone Café). The benefits of this mixed revenue model are that the organization is not dependent on one main source of funding and is better prepared for unforeseen changes in the funding environment. Another benefit is that it has reduced its grant dependency from 69% to 28%, which means the organization now has the flexibility to only pursue grants in line with its core mission and values. Finally, owning property has provided it with a large amount of equity so that it can more easily seize upon new opportunities for growth.

However, not all the developments that have occurred over the last six years have been positive for the organization. A couple of years ago the organization briefly lost its charitable status because the CRA deemed that the Cornerstone Café was not a related business - even though all the profits from the endeavor went back into program funding. In order to regain its status the organization had to create a separate business, subject to taxes, to operate the cafe. Today, the business donates a portion of its profits to Fernwood NRG to help with program funding. The organization plans to be more cautious when considering new business ventures in the future.

5.4 Dream Rider Theatre: Finding a niche market in local government

Dream Rider Theatre is an organization committed to teaching children about environmental sustainability in a fun and interactive way. The organization started when the City of Vancouver placed an ad for a theater group to deliver plays on environmental issues that were of concern for the city. After five years working with the city, Dream Rider Theatre group decided to set out on its own. Since then it has developed contracts with all the municipalities in the lower mainland to develop and present plays on important environmental issues to elementary schools. The relationship with municipalities is mutually beneficial because the municipality can dictate the subject matter of the plays and Dream Rider is fully compensated for delivering the plays to schools. There is no fee to the schools so there are no barriers to access. While revenue from municipal contracts is enough to cover costs, it does not leave much for new program development. The organization also seeks out grants that are in line with its mission to help cover the costs of developing new program material. Currently, the organization is looking at expanding its services by producing online materials that could be marketed nationally.

Dream Rider Theater has been incredibly successful with its programs and has received much positive feedback. The organization was able to tap into a niche market that not many other organizations have been able to capitalize on. Demand for its programs has largely been generated through word-of-mouth between local governments. Good business management and the quality of their programs have also played a major role in the organization's success. The organization has been able to tap into the expertise of the business community through its Advisory Board.

Having successfully served the lower mainland for a number of years the organization is running out of new material to present to schools and needs to expand its programs and services to tap into new markets. The organization has tried presenting their plays in other jurisdictions, but the travel costs are so high that it is not worth its while. It is now working on developing interactive online programs and videos that can be sold to schools and local governments. Funding to develop these programs has largely come from grants.
5.5 South Island Dispute Resolution Centre: Expanding through fee-for-service

The South Island Dispute Resolution Centre (SIDRC) was established in 1986 as the Victoria Association for Community Diversion/Mediation. Initially the organization focused on small claims cases but after these were absorbed by the Small Claims Court it had to shift focus. The organization shifted instead to providing mediation services to the community and partnered with public sector organizations to deliver these services. Its first office was run completely by volunteers.

In 1998 the organization shifted focus again and launched the Institute for Conflict Analysis and Management (ICAM), a training institute offering a mediation certification program. The Institute was fairly successful and while it provided additional revenue for the organization it also took time away from other programs. After a number of years SIDRC decided it wanted to refocus its attention on community programs and separated out ICAM. In order to generate additional revenue for the organization it began offering fee-for-service mediation, facilitation, coaching, and arbitration. This allowed the organization to not only supplement its revenue from government contracts and grants, but also allowed it to tap into a new market of clients (those who did not qualify for assistance, but did not have a lot of money to pay to a private business). The organization is currently working on expanding its fee-for-service programs.

For SIDRC, by expanding the market for its services to both paying and non-paying clients, the organization has been able to generate more work for its contractors, helping to decrease turnover. While it may seem counter-intuitive, charging a fee has also allowed the organization to attract more clients - those who can afford to pay something, but maybe cannot afford the fees of a private sector service provider. It has also helped the organization access new pools of money. SIDRC has been able to secure more grants since it diversified its revenue base because it is seen by funders to be more resilient and sustainable in the long-term.

There are also challenges that come with adding more fee-for-service programs. The organization has had to invest in marketing and communication, as well as upgrading training for contractors that provide these services. The organization is currently in the middle of creating a new strategic plan that will support a greater emphasis on fee-for-service programs.

5.6 Big Brothers of Greater Vancouver: Streamlining operations to support growth

Big Brothers of Greater Vancouver (BBGV) has been around for over 30 years and is one of the largest Big Brothers in Canada. The organization currently serves the Lower Mainland, Sea-to-Sky corridor, and the Sunshine Coast. Big Brothers of Greater Vancouver is unique in that it operates three separate entities, each dedicated to a specific function of the organization. The BBGV Charity is responsible for running all the programs; the BBGV Foundation is responsible for securing and distributing funding for the organization; and the Renew Crew is responsible for collecting used clothing and household items to sell back to Savers (known as Value Village in Canada) to earn revenue for the organization. The partnership between the Renew Crew and Savers generates about 60% of the funding for BBGV programs. The rest of the funding comes from events, grants, and private donations.

BBGV Foundation is responsible for all the central services of the organization such as accounting, marketing, grant applications and strategic planning, which frees the other entities to focus on its area of expertise. This separate organizational structure is very efficient and allows Big Brothers to operate on a scale much larger than other Big Brothers in BC. However, this model also requires a significant investment of resources. Not only are there triple the costs for tasks such as audits, but there are also
additional personnel costs. The partnership with Savers also involves a significant investment of resources because it requires vehicles, personnel, and warehouse space.

The Savers - Big Brothers, Big Sisters partnership is a model that is used across the US and Canada. It is an example of a mutually beneficial partnership. Savers receives labour from the nonprofit (pickup and delivery of the items), while also enhancing its corporate image. In return Big Brothers receives non-earmarked revenue which it can use to cover core costs for the organization. In the case of BBGV it has a large enough market that it can control the amount of revenue it generates by increasing or decreasing its pickups. However, in smaller communities like Victoria there are limits to the number of pickups you can do in a given time frame so the partnership offers less financial flexibility.

5.7 James Bay Community Project: Adapting to fill the needs of the community

James Bay Community Project (JBCP) has been a fixture in the James Bay Community for many years. Like the South Island Dispute Resolution Society, JBCP has shifted its focus a few times since their incorporation in 1974. Originally, the organization managed a home support program, but was forced to review its mandate when VIHA decided to centralize services. Today, the organization provides a diversity of services for children, youth, families, and seniors in the James Bay community. In addition to the services provided by its organization the JBCP hosts the Victoria Community Health Co-operative, LifeLabs, HerWay Home, and other independent providers of health services. The JBCP is one of the few nonprofits to actually own the building it is housed in.

In 1990 JBCP was given the opportunity to purchase the building it currently operates out of, and with the help of Vancity secured a low-interest mortgage. While this has provided the organization with a permanent residence, it has not resulted in any significant revenue for the organization. The building was not new and requires quite a bit of maintenance to keep it running. Most of the revenue generated through leasing ends up going back into the building for repairs, upgrades and general building maintenance. The organization uses volunteer labour whenever it can for repairs and maintenance, but most large repairs (such as replacing the HVAC system) need to be taken care of by professionals.

Like many other nonprofits in BC, JBCP's main source of funding is from gaming grants and government contracts (Ministry of Children and Family Development and the Vancouver Island Health Authority). The organization has been affected by government cutbacks and funding priority changes and is working hard to diversify its revenue sources by pursuing grants from foundations like the United Way, Vancouver Foundation, and New Horizons.

The JBCP is an example of both property ownership and a shared space model. The benefit of owning the property they are housed in is that the organization has a permanent residence for its services and programs and can control who it shares the space with. The JBCP has successfully developed a community space that offers social service and wellness programs/services to residents of the James Bay community. However, managing a building is not an easy task and it involves a large investment of human and financial capital. Most of the management of the building is done by program staff that have very little experience in this area and who are required to take time away from their regular tasks to deal with building issues. As the building has gotten older more repairs and upgrades have been needed and the majority of revenue from leasing has gone back into building maintenance rather than programs.
5.8 Power to Be: Becoming a fundraising powerhouse

Tim Cormode came up with the concept of Power to Be while completing an outdoor leadership and mountaineering course in Alberta. Originally started as a private business through a BC Community Futures Grant, Power to Be quickly realized that if it wanted to reach those most in need it would need to operate as a nonprofit. Today, the organization offers two main programs: an adaptive recreation program for people with disabilities and a wilderness school for children at risk. The organization is solely funded through grants and donations, which means that developing relationships with potential and existing funders is key. The Executive Director’s main focus is on developing and maintaining relationships and providing strategic direction for the organization. When the organization first started operating as a nonprofit they successfully landed a contract with the BC Ministry of Children and Family Development, however, after about a year the organization decided to move away from this type of funding due to the resources required to fulfill contract requirements.

Focusing on fundraising that is directly related to the organization's mission has allowed Power to Be to grow and develop on its own terms and build valuable relationships in the community. To build these relationships, one of the first things the organization did was send letters to all the local businesses to setup a meeting to talk. Even if businesses did not respond the organization still followed up just to make contact.

One of the downsides to Power to Be’s funding model is that the organization is caught in a bit of a Catch 22; in order to grow its programs it needs more finances, but in order to generate more revenue the organization needs more human capital to follow up with donors and event attendees which has also requires more funding. There is not a clear solution to this problem and for the time being the organization is being patient and building on its existing relationships while working on attracting new donors.

5.9 Summary of Interview Findings

The organizations profiled demonstrate that there are different funding paths an organization can take to grow and sustain its programs. Pathways expanded the impact of the FRIENDS program by selling licenses to organizations around the world. The Parenting & Family Support Centre found a business partner to take-over dissemination and implementation of Triple P on an international scale. Power to Be, which programs require more hands on expertise, has grown more slowly and is funding expansion by developing relationships with funders in the community.

The interviews also brought forward the fact that many sustainable nonprofits still rely to a certain degree on grants because they offer a fairly easy/low risk source of revenue. Most of the organizations interviewed had developed multi-avenues of funding to support their programs and services as it was hard to find one source that could generate all its needed revenue.

For most of the organizations its funding model has been developed through a process of trial and error, rather than a guided development process. However, some common factors have played a role in determining what type of funding they pursued. These factors are: the level of control the organization decided to maintain over programs and services; the level of risk their leadership team was willing to take in pursuing funding; and their organizational mission and vision. All of the organizations interviewed are compared against these factors in Table 2.

**Level of control** - If the service or program requires tacit knowledge, specialized competencies, or direct relationships with funders or consumers there is more need for direct control of the programs by the
originating organization (Mulgan et al., 2007, p.19). Most of the organizations interviewed were place based and depended on direct relationships with funders and consumers to maintain demand and sustain themselves. Some, like Power to Be, also required specialized competencies.

**Level of risk** - Operating a business involves a higher degree of risk than just operating a nonprofit. Starting a business requires a large upfront investment of resources and there is no guarantee that the organization will see a return. Demand for a program or service can be affected by many factors including the state of the economy, program pricing, perceived need, and competition (Mulgan et al., 2007, p.14). Finding success as a business can be even more challenging if the program is intangible because consumers will need convincing the program fills a need, as was a challenge mentioned by Pathways. Boards that are not willing to take big risks are more likely to focus on funding that does not involve a large investment such as grants, donations, and contracts.

**Mission and vision** - Mission and vision played an important role in determining how the organizations developed and what funding it pursued. Organizations like Fernwood NRG and JBCP that were created to address a local need have developed programs and services specifically geared to their users/clients. As a result the funding they pursue is usually locally based. Pathways and the Parenting & Family Support Centre on the other hand have designed programs to address a general need (i.e. anxiety and parenting) and they have done so in a way that can be modified for different contexts. The funding they have pursued is on a more national and international level.
Table 2. Overview of funding models and factors that have influenced the type of funding pursued by the organizations interviewed

<table>
<thead>
<tr>
<th>Organization</th>
<th>Funding Model</th>
<th>Services/ Programs</th>
<th>Level of Control</th>
<th>Level of Risk</th>
<th>Mission/ Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pathways Health &amp; Research Centre</td>
<td>Revenue from sales of licenses, training and resources for the FRIENDS programs, and from in-house therapy programs and workshops.</td>
<td>Training, resources, and therapy programs.</td>
<td>Medium/high level of control - require license holders to attend in-person training in Australia. Some flexibility to adapt programs to local context.</td>
<td>High level of risk. Pathways offsets risk by supplementing income with therapy programs &amp; workshops.</td>
<td>Preventing anxiety in children - an issue which exists around the world.</td>
</tr>
<tr>
<td>Parenting &amp; Family Support Centre and Triple P International</td>
<td>Royalties from sale of license to TPI, which earns profits from selling training, accreditation and resources.</td>
<td>Training and resources.</td>
<td>Medium level of control - require in-person training and testing before becoming accredited practitioner, but there is flexibility to adapt programs to local contexts.</td>
<td>The Parenting &amp; Family Support Centre removed much of the risk to itself by giving the program to a separate entity to market and sell internationally.</td>
<td>Developing parenting skills - an issue which exists around the world.</td>
</tr>
<tr>
<td>Fernwood Neighbourhood Resource Group</td>
<td>Government contracts, grants, program fees, rental income, donation from cafe, and events.</td>
<td>Community programs &amp; services, rental property, sale of goods (separate business).</td>
<td>High level of control - Everything is managed/overseen by central office.</td>
<td>Most of their programs are low risk, but the cafe and properties are much more high risk.</td>
<td>Devoted to building neighbourhood resiliency - its programs are intensely locally focused.</td>
</tr>
<tr>
<td>Dream Rider Theatre</td>
<td>Local government contracts and grants.</td>
<td>Children's programs</td>
<td>High level of control – programs are presented directly by DRT. Level of control could change though with introduction of online programs.</td>
<td>Until now programs have been relatively low risk, but investment in online programs involves a higher degree of risk</td>
<td>Teaching children about sustainability issues - while their focus has been local, the mission can be applied globally.</td>
</tr>
<tr>
<td>South Island Dispute Resolution Centre</td>
<td>Grants, government contracts, and fee-for-service.</td>
<td>Training, workshops, and counselling services.</td>
<td>Medium/high level of control - work with partners on many of their programs allowing local adaptation.</td>
<td>There is some risk involved in fee-for-service because it involves an investment of marketing resources.</td>
<td>Providing dispute resolution programs to the community - locally focused programs and services.</td>
</tr>
<tr>
<td>Big Brothers of Greater Vancouver</td>
<td>Sale of used clothing to Savers, donations, events, and grants.</td>
<td>Mentoring services (depend largely on volunteers) and skills training</td>
<td>High level of control – standardized processes and procedures are used because of nature of the programs.</td>
<td>Operating three separate entities involves a higher level of risk than having one big organization.</td>
<td>Pairing children at risk with mentors - issue can be applied globally but need culture of mentorship to make it work.</td>
</tr>
<tr>
<td>James Bay Community Project</td>
<td>Government contracts, grants, and a little bit from leasing space.</td>
<td>Community programs &amp; services, property rental, and sales (small volunteer thrift store)</td>
<td>High level of control - Everything is managed/overseen by central office.</td>
<td>Purchasing a property can be risky, but provided JBCP with a large piece of equity to fall back on if needed.</td>
<td>Providing services for residents of the community - again programs and services are intensely local.</td>
</tr>
<tr>
<td>Power to Be</td>
<td>Donations and grants.</td>
<td>Outdoor programs for children and people with disabilities</td>
<td>High level of control - programs are run out of one of their two local offices in Victoria and Vancouver.</td>
<td>Their funding model is relatively low risk in that it mostly involves investing time to develop relationships.</td>
<td>Adventure therapy for children with disabilities and at risk - specific solution to problem, requiring specialized knowledge/ equipment.</td>
</tr>
</tbody>
</table>
SECTION 6 – LITERATURE REVIEW: FACTORS CONTRIBUTING TO SUCCESSFUL SCALING UP

The literature review aims to provide an overview of the factors that contribute to successful scaling up to inform the fourth phase of the WITS programs development. The research involved a review of academic journals and periodicals, as well as a scan of independent research reports and other published documents on specific programs and organizations.

The literature on scaling up reveals that there are many different theories about what combination of factors need to be addressed by an organization looking to scale up, but five over-arching themes came out of the literature:

1. The need for organizations to develop a focused mission and vision;
2. The importance of distilling the program or service down to its essential elements;
3. The importance of choosing the appropriate scaling up method for your program or service;
4. The need to develop organizational capacity; and
5. The importance of monitoring performance and adapting to new environments.

6.1 Focused Mission and Vision

Much of the literature discussed the importance of developing a clear and focused mission and vision before scaling up (Bradach, et al., 2008, p.91; Colby, Stone, & Carttar, 2004, p.26; LaFrance et al, 2006, p.5). The mission provides the parameters inside which the organization operates; these can be narrow or broad depending on the goals of the organization. Without a well-defined mission there is the risk that the organization loses sight of its ultimate goals as new opportunities present themselves and/or new staff and stakeholders are introduced to the organization (LaFrance et al., 2006, p.5). A clearly articulated mission and vision that is understood by all stakeholders will help guide decisions and direct resource allocation during the scaling up process to ensure maximum impact (LaFrance et al., 2006, p.5).

Bradach, et al. (2008) and Colby, et al. (2004) also emphasize the importance of defining what success looks like before beginning the scaling up process. They advocate that organizations go beyond clarifying its mission and develop an intended impact statement. An intended impact statement is defined as “a statement or series of statements about what the organization is trying to achieve and will hold itself accountable for within some manageable period of time” (Colby, et al., 2004, p.26). This statement provides a detailed description of what the organization hopes to achieve and can help attract support for its cause, as well as guide internal processes and decision making during the scaling up process (Bradach, et al., 2008, p.91). According to Bradach, et al. the most fundamental decision that “a nonprofit can make is to define the results it must deliver in order to be successful” (2008, p.91).

The mission, vision, and intended impact statement provide the guiding framework for scaling up and inform future strategies and decisions.

6.2 Distilling the Program or Service Down to its Essential Elements

Scaling up a program or service that is more complicated than it needs to be can jeopardize the success of the scaling up effort because new locations may have trouble implementing it. The scaling up literature emphasizes that programs that have the fewest components and are clearly articulated are the easiest to scale up because they can easily be replicated by other organizations in new locations (Kohl & Cooley, 2005, p.4; LaFrance et al., 2006, p.10). That is not to say more complex programs cannot
be replicated, they just require a higher degree of control to ensure proper replication which can slow down the scaling up process (LaFrance et al., 2006, p.6).

In order to prepare for scaling up, the authors recommend distilling the program or service down to its essential elements, or its minimum critical specifications (Bradach, 2003, p.21; Dees, Anderson, & Weiskilern, 2004, p.30; Kohl & Cooley, 2005, p.4; LaFrance et al., 2006, p.10). This refers to deciding which elements of the program or service are essential to achieving desired outcomes, and which are not. Bradach, et al., and Colby, et al. refer to this process as developing the organizations’ theory of change. This involves using systems thinking to “show causes and effects among the parts of the operating model” (Bradach, 2003, p.21).

LaFrance et al., stipulate that organizations can still move forward with scaling up even if they have not solidified their critical specifications, but cautions that they should proceed slowly so that they can test the program elements in different settings to see which are most critical to achieving their desired impact (2006, p.10).

### 6.3 Choosing the Appropriate Scaling Up Method

The method chosen for scaling up can have an impact on program uptake, which plays a major role in how successful the scaling up effort is. Program uptake can be influenced by many factors including whether communities see the program as fulfilling an unmet need, openness to outside organizations, the level of complexity of the program, and how well it fits with the dominant values or ideology (Dees, et al., 2004, p.30). Organizations should evaluate the environment in which they are scaling up to determine receptivity to their program. Based on these findings they can decide which method of scaling up to use.

Methods for scaling up include uncontrolled diffusion, directed diffusion, takeover, and organizational growth. The main distinguishing feature between the different methods of scaling up “is the degree to which the originating organization (i.e. the organization that managed the initial project) continues to control implementation as the model goes to scale” (Kohl & Cooley, 2007, p.8). Figure 3 depicts the spectrum of control an originating organization can have and where the different methods of scaling up fall.

<table>
<thead>
<tr>
<th>Uncontrolled Diffusion</th>
<th>Directed Diffusion*</th>
<th>Takeover</th>
<th>Organizational Growth*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation spreads like weeds through media, word-of-mouth, and professional networks. Self-appointed champions take up the program. Very little control over how program is implemented.</td>
<td>Originating organization partners with local organizations to deliver the program. Some formalized procedures for implementation, but no direct control. Licensing and franchising would fall in this category.</td>
<td>Program/innovation is given to a larger organization like a government body for implementation. The implementing organization is directly trained by the originating organization on the program components and proper implementation.</td>
<td>The originating organization decides to implement the program themselves to ensure fidelity. This strategy is used when the innovation requires a high level of control to ensure success.</td>
</tr>
<tr>
<td>*Also referred to as affiliation or collaboration</td>
<td>*Also referred to as replication or expansion</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Figure 3. Spectrum of control offered by different methods of scaling up. Low control methods are on the left, while high control methods are on the right. Adapted from “A spectrum of models of diffusion and growth,” in Mulgan, G., Ali, R., Halkett, R. and Sanders, B. (2007). In and out of sync: The challenge of growing social innovations. Research Report for the National Endowment for Science, Technology and the Arts, p.17.*
Since the level of control maintained by the originating organization is greatly influenced by the complexity of the program/innovation to be scaled up, innovations that are complicated or inextricably linked to the originating organization will require organizational growth in order to ensure success (Dees, et al., 2004, p.30; Kohl & Cooley, 2007, p.8). However, Mulgan et al. argue that in many cases organizations overestimate the level of control they need to maintain over their innovation, which can have a detrimental effect on the scaling up effort. Based on their findings organizational growth is not required when:

- Innovations are simple and transferable;
- Strong interests can be persuaded to adopt the innovation, but will resist incursion from a new organization; and
- There is a better chance of mobilizing key resources such as capital, people, and relationships, through existing organizations than through creating a new one. (Mulgan et al., 2007, p.19)

Other factors that can influence scaling up decisions are the desired speed of scaling and the resources available (LaFrance et al., 2006, p.7). Uncontrolled diffusion is by far the fastest method of dissemination, while organizational growth is probably the slowest because it requires developing internal capacity and obtaining sufficient financial resources to maintain growth (Kohl & Cooley, 2007, p.10). In some situations going to scale quickly might be needed if the climate is favourable towards the innovation and this is expected to change in the future; in this situation an organization might decide to pursue uncontrolled diffusion or directed diffusion.

Each of the scaling up methods depicted in Figure 3 require different amounts of resources depending on where they fall on the spectrum of control. Organizational growth requires the most resources because it involves hiring and training more staff, and possibly finding new office space (LaFrance et al., 2006, p.6). Uncontrolled diffusion on the other hand can be done with very few resources and in some cases might just require a spokesperson to raise awareness of the program or service so it can be taken up by others.

The literature does not say that an organization must choose one method of scaling up to be successful, in some situations multiple approaches to scaling up might be desirable, but it does emphasize that organizations should consider the complexity of its innovation, the desired speed of scaling, and what resources it can access before moving forward with a particular method. “Whichever model a nonprofit chooses, it should make that choice after in-depth consideration of what will work for that particular organization, in terms of risk, support to target population, mission, mandate, and values” (Murray, 2009, p.250).

Appendix 4 provides an overview of the four scaling up methods shown in Figure 3 and measures them against the three criteria outlined in LaFrance et al.’s article: program complexity, desired speed of scaling, and resources required.

**6.4 Building Organizational Capacity**

Building organizational capacity is especially important in instances where the originating organization has decided to take care of implementation itself. Scaling up “requires skills quite different from those of local service delivery” (Dees, et al., 2004, p.31) and organizations must ensure they have the capacity necessary to support growth. Organizational capacity can be broken down into six components:
1. Mission, vision and strategy
2. Strategic relationships
3. Program delivery and impact
4. Internal operations and management
5. Finance
6. Governance and leadership (Connolly & Lukas, 2002)

Some of these components (mission, vision & strategy, and program delivery & impact) have already been covered as main factors that contribute to successful scaling up; the rest are covered here.

**Strategic relationships**

Building networks of support can help increase demand for your program or service as well as open up access to resources not currently at the organizations disposal. Bloom and Chatterji refer to the process of building strategic relationships as *Alliance Building* and maintains that “forging alliances requires being highly in tune with the ecosystem in which the organization operates, searching for other groups with which the organization has shared goals” (2009, p.120).

Strategic alliances can help legitimize the program or service and bring greater awareness to funders and clients. Both LaFrance et al. and Bloom and Chatterji suggest finding spokespeople as a strategy to garner greater attention and increase legitimacy (2006, p.16; 2009, p.119). Partnerships with governments can lead to both revenue generation as well as “leverag[ing] the power and scope of the other sectors to broaden its own audience and impact” (LaFrance et al., 2006, p.16). Partnerships with businesses can provide access to resources and expertise to help tap into new markets.

**Internal operations and management**

Organizational growth “tends to require more robust processes and systems, defined roles and rules, formal communication, and decision-making structures” (Mulgan et al., 2007, p.21), as well as more skilled staff. Effective staffing can lead to greater effectiveness in other organizational capacities like attracting resources, building networks, and developing the infrastructure necessary to support organizational growth (Bloom & Smith, 2010, p.14). In order to fill positions with people who have the requisite skills and experience, organizations will need to invest in developing human resource functions (Bloom & Chatterji, 2009, p.117).

Organizational culture can also play an important role in developing organizations that are capable of handling greater demand and pressures. Many organizations that have succeeded in scaling their impact cite organizational culture as one of their factors of success. A strong organizational culture can help “attract and retain talented staff, sustain high performance, and continually innovate” (LaFrance et al., 2006, p.11). Structures, policies, processes, strategies, rituals, staff, and leadership all work together to create an organizational culture; the better aligned these are the stronger the culture will be (LaFrance et al., 2006, p.12).

**Finance**

No matter how an organization decides to scale up it will require an investment of resources. Bloom and Chatterji maintain that generating revenue should become a top priority for any organization considering scaling up and it should invest in “tasks such as strategic planning, market research, prospecting, fund-raising, grant-writing, selling, and advertising” (2009, p.122).
Before starting the scaling up process Dees, et al. recommend organizations develop a plausible resource plan outlining what resources are required for the strategies under consideration, ways to reduce costs, and any opportunities to generate renewable/reliable revenue streams (2004, p.30). LaFrance et al. support this idea, “the earlier organizations prepare for the financial costs of scaling and sustaining a scaled operation, the more effectively they are able to raise funds. Not planning ahead means trying to raise money in the middle of scaling which can reduce the leverage the organizations have with funders” (2006, p.16).

LaFrance et al. also recommend focusing resource development on the mission to ensure greater stability and sustainability, “organizations that approach fundraising as an opportunity to build support and connect people to the organization’s mission are more likely to develop fundraising strategies that also directly contribute to mission achievement. These programs tend to be more rewarding for donors and supporters and, as a result, are more sustainable” (LaFrance et al., 2006, p.16).

**Governance and leadership**

Leadership plays an important role in scaling up because it is the decisions of the Executive team (Directors and Board Members) that will determine how, where, and when scaling takes place. Board members and Executive Directors are responsible for making strategic and management decisions that will ultimately lead to the success or failure of a scaling up effort (LaFrance et al., 2006, p.17). As a result, the Executive team must be fully committed to the scaling up effort if they hope to be successful. If they are not, it is sometimes best to create a new organization to support the scaling up effort, or find an existing organization that could take over scaling (Dees, et al., 2004, p.31).

According to Crutchfield and Grant’s (2012) study of 16 of the most successful nonprofits in the United States, developing strong leadership is not just about building the capacity of Executive Directors and Boards, it is also about empowering staff and teams, and developing connections between “the organization and key constituents and stakeholders in its environment” (p.200). Shared leadership results in organizations that are better able to leverage resources in their community, build networks, develop highly skilled teams, and deal with complex, continuously changing environments (Crutchfield & Grant, 2012, p.178-180); all of which are necessary during scaling up.

**6.5 Evaluating Success and Adapting to New Environments**

In order to successfully maintain scale, organizations must constantly monitor performance to see if they have achieved their desired impact. If the program or service is not working how it is intended than uptake will begin to diminish and the organization could lose its credibility. In most cases performance is monitored by collecting data on an ongoing basis. Before beginning the scaling up process organizations should decide what data they want to collect and for what purpose, and build easy to use systems into their program or services to be scaled up (LaFrance et al., 2003, p.14). Data collection allows organizations to measure whether programs or services are being implemented successfully (especially important if organizations are using low control methods of scaling up) and if there are issues that need to be resolved. Data can also be used to show funders that the program or service is having an impact (LaFrance et al., 2003, p.13). Kohl and Cooley (2005) recommend the following elements be built into programs going to scale:

- Doing a baseline survey;
- Documenting the model (especially processes such as working with local communities); and
- Building in methods for monitoring, measuring, evaluating and publicizing results (p.7)
Data collection can also help organizations adapt the program or service for new contexts. Implementing the program or service in new locations is a process of trial and error and organizations need to be ready to adapt programs to meet local conditions (Mulgan et al., 2007, p.16). Crutchfield and Grant identify mastering the art of adaptation as one of the six practice of high-impact nonprofits, “at its core, adaptability entails the ability to perceive changes in the external environment and respond with innovative solutions. It requires being open to new inputs and putting into place intentional systems that enable organization-wide learning and reflection” (2012, p.41).

6.6 Summary of Findings

The literature review identified five main contributors to successful scaling up. A focused vision and mission will help the organization understand its ultimate goal and make strategic decisions. Distilling the programs or services down to their essential elements will make them easier to implement in new contexts. The design of the programs or service will also play a role in determining what scaling up method(s) will be most appropriate. There are four main methods of scaling up: uncontrolled diffusion, directed diffusion, takeover, and organizational growth. The method(s) chosen will determine what resources and capacities the organization needs to develop in order to sustain their scaling up strategy. If an organization decides to support scaling up itself, it will need to develop a number of different organizational capacities in order to ensure success. These include developing strategic relationships, securing finances in line with the mission and vision, and building governance and leadership. Finally, the success of the scaling up strategy will be influenced by how well the organization is able to learn from new contexts and adapt the program to fit local needs. While addressing all of these factors might seem overwhelming at first, if approached one-by-one they provide a list against which an organization can assess if it is ready to scale up.

The main finding from the literature review that is most relevant to this project is the influence of the scaling up method on the resource needs of the organization. Low control methods require very little resource inputs, but there is also a much higher risk that the programs will be implemented incorrectly. Higher control methods require higher resource inputs but there is greater program fidelity.
The Rock Solid Foundation and the WITS Programs have come a long way since they began in 1997. The UVic research team has played a big part in the successful development and dissemination of the programs - helping to secure funding to develop the programs, building networks to disseminate the program, and conducting evaluations to establish an evidence base. The programs are now at a point where they are being disseminated nationally, but it is unclear how the growth of the programs will be supported over the long-term.

The purpose of this research report was to:

- investigate how different organizations have developed models to fund and sustain their programs and services over the long-term
- identify resources and organizational frameworks required to successfully scale-up
- explore how different scaling up strategies might require different funding strategies and institutional structures
- make a recommendation of a long-term sustainable funding model to grow and sustain the WITS programs

An integrated approach was taken to answer these questions which included an environmental scan, interviews, and a literature review. The findings from this research indicate that a strategic approach to scaling up is needed given the pressure on nonprofits from the external environment, the variety of different funding options available to nonprofits, and the number of factors that contribute to successful scaling up as outlined in the literature. The method(s) of scaling up chosen will impact the scaling up strategy and determine what type of resources are needed to sustain the effort over the long-term. The following sections summarize these themes in more detail.

### 7.1 Organizations Need to Approach Scaling up Strategically

The scan of the nonprofit environment in Canada shows that it is a challenging time for nonprofits to be scaling up programs and securing funding. An aging population and a population shift from rural to urban settings are resulting in staff shortages. If nonprofits hope to maintain staff levels and attract top talent they will need provide compensation comparative to the private sector. Changes in funding practices by governments and businesses means there is less funding available for nonprofits and organizations will need to work harder to secure sustainable revenue streams. Changing expectations by volunteers means that organizations will need to hire designated personnel to engage with volunteers and provide meaningful experiences. A greater degree of public scrutiny of how public sector funds are spent and what impact programs achieve, means that nonprofits will have to invest additional resources in measuring impact and reporting. Increased pressure to address complex social issues means that nonprofits will need to become adept at developing partnerships amongst themselves, as well as with government and the private sector. Finally, pressure by government to be more innovative, and pressure from the public to engage using the latest technology, means that nonprofits will need to stay on top of current trends and learn to take more risks if they want to remain relevant.

For these reasons, nonprofits will need to be incredibly strategic to survive and thrive. The review of the literature in Section 5 on scaling up also confirmed the need to be strategic. Scaling up requires a large investment of time, energy and resources - if organizations are not adequately prepared they risk losing their investment on a failed effort to scale up. Approaching scaling up strategically can help mitigate
these risks. Based on the findings of the scan and the literature review, some strategies to help build the capacity of nonprofits to support scaling up are:

- develop a solid mission and vision;
- stay focused on their ultimate goals and avoid mission-drift;
- develop partnerships with organizations with similar goals to share resources and reach new target markets;
- engage with the business community to access new resources and expertise;
- develop engaging messages and media campaigns to attract the attention of key funders;
- prioritize the role of staff and leaders by adequately compensating them; and
- create systems to monitor trends, collect data and adapt in a rapidly changing environment.

Many of the representatives of nonprofits interviewed in Section 6 were using the strategies identified in the environmental scan. The organizations had developed strong missions and visions to guide the organization and developed strategic plans to help inform day-to-day decisions. Organizations had developed networks locally, and in some cases, internationally to attract new people to their cause and share information and resources. Organizations had found ways to engage with the private sector by creating Advisory Boards or developing business partnerships like that of Big Brothers and Savers. Finally, all of the organizations demonstrated a capacity to adapt to the changing environment around them and seek opportunities wherever possible.

To increase the Rock Solid's chances of successfully scaling up the WITS programs it would be advisable for the organization to develop a comprehensive strategy to guide the process.

7.2 There is No Single Path Towards Sustainable Funding, but Many

Section 6 showed that each of the organizations interviewed had developed unique funding models based on the degree of flexibility in their programs and services (i.e. level of control), the level of risk their leadership team was willing to take, and their mission and vision. Each of the funding models profiled had both benefits and challenges associated with it, making it hard to identify one as superior to any other. The unique funding models allowed each organization to grow their programs or services (to different degrees) and sustained them over the long run.

In order to choose from these various funding models the Rock Solid Foundation will need to develop a better understanding of the method of scaling up it will use, what level of control it wants to maintain over program implementation, what level of risk the organization is willing to support to develop new revenue sources, and what its mission and vision are for the WITS programs over the long-term.

7.3 The Model Chosen for Scaling up will have a Large Impact on Funding Needs

As discussed in Section 5, the literature suggests that an organization can choose from among a variety of methods to scale up depending on the complexity of the programs, their desired speed of scaling, and what resources they can access (see Appendix 4). Each offers a different degree of control over program implementation by the originating organization and flexibility in how the program is adapted (Figure 3).

Together, Sections 5 and 6 indicate that the model organizations used to scale up had an important influence on the type of funding they sought. Organizations scaling up through growth tended to go after local funding because they were more community based and their programs resonated with local funders. Organizations with less central control over their programs tended to seek funding from the private market.
The Rock Solid Foundation will need to decide what method(s) of scaling up it will use before it can fully understand its funding needs.

7.4 Pulling it All Together: Implications for Developing Strategic Options

The environmental scan and literature review both point to the need for organizations to be strategic in how they approach their mission. Different opportunities and challenges will present themselves to organizations. Unless organizations are clear about their priorities, they risk going off track and using precious resources on endeavors that do not bring about their intended impact. The majority of the organizations interviewed mentioned having a strategic document to guide the organization’s decisions and day-to-day activities. Organizations considering scaling up should develop some sort of strategic document to guide decision making and ensure the organization stays on track during the process.

The biggest strategic decision the Rock Solid Foundation must make before moving into phase 4 is choosing how it will scale up. It does not need to commit to one method - it can pursue many at once - but before choosing it needs to understand the organizational and resource requirements of each option, and how it could impact the sustainability of the WITS programs. Different methods of scaling up have different returns and risks and the organization will need to understand what these are before choosing how it will scale up.

What scaling up method(s) the Rock Solid Foundation chooses will impact its personnel and infrastructure needs, what partnerships it decides to pursue, and what resources it needs to sustain itself; all of which will impact its funding needs. The interviews with directors identified many funding options for the Rock Solid Foundation to consider. Each organization interviewed had developed a unique funding model that allowed them to sustain their programs and services over the long run, as well as achieve at least some moderate growth. In most of the cases, organizations pursued more than one source of funding which contributed to their sustainability by making them less vulnerable to changing funding priorities and fluctuating demand.

The findings from this report indicate a need to approach scaling up strategically to ensure long-term success. There are four main methods or strategies for scaling up outlined in the literature: uncontrolled diffusion, directed diffusion, takeover, and organizational growth (outlined in Figure 4). The method chosen will have an impact on the sustainable funding needs of the Rock Solid Foundation. The options presented in the next section will be based on these methods of scaling up and will offer different strategies for the organization to achieve sustainable long-term funding. The strategies outlined will be measured against five criteria: readiness, receptivity, resources, risk, and returns (Dees, et al., 2004) to develop a recommendation for the Rock Solid Foundation moving forward.
8 – OPTIONS AND RECOMMENDATIONS

The following section presents three options for the Rock Solid Foundation to move forward with upscaling of the WITS programs. The options are based on the four different methods of scaling up outlined in the literature review (i.e. uncontrolled diffusion, directed diffusion, takeover, and organizational growth). The first two options are directly based on the methods of takeover and organizational growth, while the third option is a hybrid of directed diffusion and organizational growth (see Appendix 4 for more details about these methods). An option for uncontrolled diffusion was not presented as this option does not need organizational support because diffusion is uncontrolled.

Each of the options are summarized first and then they are analyzed against the criteria of readiness, receptivity, resources, risk, and returns. These criteria are representative of the factors for success outlined in the literature review and also take into consideration funding requirements. These five criteria offer an opportunity to evaluate which scaling up strategy would be best suited to the WITS programs. The final part of this section puts forward a recommendation for the Rock Solid Foundation to consider.

8.1 Options

1) Takeover model: Find a large national organization to adopt the WITS programs

In the scaling up literature there are examples of organizations that adopt a deliberate strategy of giving their innovation to another organization to scale up. This usually occurs if the originating organization lacks the resources to support and implement the innovation themselves (Mulgan et al., 2007, p.18). Governments are often the organizations that adopt the innovation as they generally have more reach and resources to scale up than nonprofits. However, in Canada the federation system, which divides power and responsibility among the different levels of government, can limit the scaling up effort because governments can only spread the innovation in areas within their jurisdiction. Other potential adopting organizations are large national nonprofits that could add the innovation to their existing roster of programs or services.

What level of control the Rock Solid Foundation maintains over ongoing program development and monitoring would be negotiated in the transfer of the program. The advantages of this model are that Rock Solid does not have to devote resources to building organizational capacity and it can transfer the risks associated with scaling up to the adopting organization. However, in transferring the program to another organization Rock Solid could lose creative control of the programs, and there is a greater risk that the programs could be discontinued as the original passion and dedication that has driven the programs forward might not be present in the adopting organization.

There are still resources required for this option, even though the scaling up effort is mostly taken care of by someone else. Resources will be required to find an organization to adopt the programs. If the Rock Solid Foundation decides to pursue this option, it will need to be strategic in identifying potential organizations to adopt the program. Potential adopting organizations should have a strong interest in the program, have the resources and the reach needed to scale up the programs, and be open to ongoing input from the Foundation.

This option will also require staff and board time to transfer knowledge and practices to the adopting organization. The level of complexity of the programs is usually the main indicator in how long this
process will take. In the case of the WITS programs, it would take at least three months to complete initial training and knowledge transfer, and UVic and Rock Solid would need to remain involved for at least a year afterwards to provide advice and support. Depending on the location of the adopting organization some travel may be required. In addition to the resources needed for program transfer, ongoing resources may be required if the Rock Solid Foundation and the UVic research team decide to maintain a certain level of involvement in program development.

Funding to support this option would only need to be secured for the short-term, as the resource requirements would decline substantially after the programs were transferred. Grants will probably be the best funding solution for this option because it doesn't require a large investment of resources like developing a new funding stream would. As discussed in Section 5, funders like to see partnerships, so this element could be emphasized in grant applications. Depending on who the adopting organization is, there could be the potential for it to share some of the costs of knowledge transfer and training.

If the Rock Solid Foundation decides on this option, it would need to identify a potential national organization to take-over the programs soon to limit the amount of time it would be supporting the WITS programs on its own after the UVic grants expire in 2015. The Foundation would also need to invest resources into formalizing all of their documents and training materials to ensure a smooth transition. Finally, the organization may wish to consider re-visiting the elements of the WITS programs to ensure the programs have been distilled down to their minimum critical specifications so it is clear to the adopting organization what elements of the program are absolutely necessary to ensure program success in new contexts.

2) Organizational growth model: Expand the Rock Solid Foundation and branch into new locations

This option is based on the organizational growth scaling up method on the top end of the spectrum of control. It would involve the Rock Solid Foundation building up capacity so that it is able to support the WITS programs on its own. In order to introduce the programs to new locations the organization would look to setup local offices in main cities across the country. This would allow the organization to ensure that programs were being properly implemented and adequately supported in new locations. Local offices could liaise with school boards, schools, and community leaders in their area helping to get the word out about the programs and dealing with any barriers that might exist to implementation. This option allows the Rock Solid Foundation to expand its reach across the country while maintaining a head office in Victoria. It also builds on its community success in Victoria by establishing local offices that could work closely with schools and community members to find the best way to implement the programs locally.

This option would require an annual investment of about $594,000. Up until now the Rock Solid Foundation has only been responsible for supporting a third of the program costs for WITS. Therefore, before it is ready to support the WITS programs on its own it will need to invest resources into building organizational capacity. At a minimum the organization would need a full-time Executive Director, Administrative Assistant, and Resource Coordinator, as well as the existing Program Developer and Communications Coordinator that are currently funded through UVic. The Foundation would also need to secure office space to accommodate more staff and resources. Once the organization is ready to start branching into new locations it will need to hire staff and train them. Once branches are established in new locations they could be responsible for generating their own revenue through local sources.
It would be best for the organization to pursue multiple revenue sources for this option. A Fund Development Manager could be hired to expand the organization's capacity to attract funding, including building a donor base and developing relationships with business partners. In addition, the Rock Solid Foundation could look into charging a fee for the WITS programs to offset the costs of scaling up. These options involve a certain amount of risk because they require an upfront investment of resources, but they have the potential to generate higher amounts of revenue for the organization. A break-down of the initial projected expenses for this option are provided in Appendix 5, a potential organizational chart is provided in Appendix 6.

If the Rock Solid Foundation decides to pursue this option, the first step would be to develop a strategic plan to guide the organization as it grows and begins to scale up the WITS programs nationally. The initial focus should be on building organizational capacity, to ensure a strong base to support the scaling up effort. This option will require a large influx of revenue so the sooner the organization starts developing its revenue generation capacity the better, whether this means hiring a Fund Development Manager or developing the WITS programs for sale (or both).

3) Organizational growth and directed diffusion model: Create a national entity and partner locally

This option is a hybrid between the organizational growth and directed diffusion methods of scaling up. It is also similar to the method Rock Solid and UVic are currently using in Edmonton to introduce the programs in evaluation schools through the help of the Society for Safe and Caring Schools & Communities, with the exception that coordination would be managed by a central office. A national head organization would be established in a centralized location in Canada and would be responsible for building partnerships with local organizations around the country to implement the programs. Formalized contracts would specify the roles, procedures, and practices to be followed by each organization. Each organization would remain an independent legal entity.

The national organization would have the role of ongoing program development and evaluation, marketing, and identifying organizations to partner with, while partner organizations would take on the role of disseminating the programs in their communities. This option allows the programs to be adapted to local contexts by partner organizations, but still provides the national organization with a certain level of control over how programs are implemented through formalized agreements with partner organizations. This option is desirable if the Rock Solid Foundation is not prepared to support the scaling up effort on its own, but still wants more control over how the programs are scaled up than option 1 provides.

This option would require an initial investment of about $675,000 because it involves building a whole new organization. Resources would need to be put into finding Board members to run the organization, incorporating the new organization, and developing the initial infrastructure (bylaws, bank accounts). Staff requirements would be similar to those outlined in option 2 with the addition of a national outreach coordinator to build partnerships with local organizations (a breakdown of the estimated initial costs is provided in Appendix 7 and an organizational chart for this option is provided in Appendix 8).

Funding for this option could come from a variety of sources. Start-up capital could be obtained through government or foundation grants. Both the province of Ontario and the United Way of Ottawa offer funding on a 2-3 year basis which would help cover the initial costs. A business partnership with a national organization could help cover more long-term costs such as ongoing program development and marketing. An Advisory Board made up of individuals from the business community could help increase
the organization’s access to business partners. The organization could consider charging membership fees to partner organizations or higher fees to schools for access to program resources to offset costs, but the organization would need to ensure there is enough demand and willingness to pay before introducing fees (perform a market study).

If the Rock Solid Foundation decides to pursue this option the first step would be deciding where to establish the national organization. Ottawa might be a good choice as it is the capital, is bilingual, and the organization has already built strategic relationships in the area. The next step would be developing the infrastructure and fulfilling the legal requirements of a new organization. The Province of Ontario has a Not-for-Profit Incorporator’s guidebook on its website that details the steps to incorporate a new nonprofit in the province: http://www.attorneygeneral.jus.gov.on.ca/english/family/pgt/nfpinc/. The Foundation could also start identifying potential funding sources and business partners and develop a strategy to engage with them.

8.2 Comparing the Options

The three options proposed will be measured against readiness, receptivity, resources, risks, and returns to determine what the most promising path forward is for the Rock Solid Foundation. The following part of this section explains each of the criteria and then analyzes where the WITS programs stand right now. Table 3 is then used to analyze the levels associated with each option to determine which one might be best for the WITS programs.

**Readiness** - Refers to whether an innovation is ready to be spread (i.e. is it proven to work? has it been distilled down to its essential elements?), and if the originating organization is ready itself to take on the scaling up effort.

The WITS programs have been developed over many years and are proven to be effective in a variety of different contexts and locations. The program components are straightforward and most are easily accessible through the website. The programs are considered ready to be scaled up. In terms of organizational readiness to handle the scaling up effort there would need to be a lot of capacity building done before the Rock Solid Foundation is ready for this. At this time the programs are mostly supported through the UVic Department of Psychology, so the Rock Solid Foundation would need to start taking on these responsibilities as well as build extra capacity to support the programs on a larger scale. Another option is for the Rock Solid Foundation to give the programs to another organization to scale up (either by creating a new one or finding an existing one).

**Receptivity** - Refers to what strategy is most likely to result in uptake of the innovation. For example, if it is anticipated that users will be resistant to a new organization then a less centrally controlled approach (such as collaboration) would be better (Dees, et al., 2004, p.30).

Bullying has been recognized by most levels of government in Canada as a major problem affecting youth. Many provinces, including BC, have introduced tougher mandatory reporting of bullying incidents in schools. This means that there is a supportive climate for bullying prevention programs in schools and communities. However, it also means that there are a lot more programs targeting this issue, which means the WITS programs could experience resistance to their programs in communities that already have a program in place. Partnering with organizations that have already built legitimacy in a community could help overcome this resistance.
Resources – Refers to the resources required for a scaling up strategy, and how organizations will obtain them.

As it currently stands the Rock Solid Foundation brings in about $200,000 in annual revenue to support the dissemination of the WITS programs. On the scale of nonprofits, they would be considered a small organization. Their main source of funding is project grants of $20,000 or less (with the exception of Gaming Grants). At this time they have limited capacity to seek funding (only 1 part-time staff) so if they were to pursue option 2 or 3 they would need to invest in their funding capacity in order to generate more revenue.

Risks – are the potential negative effects if a program fails to be implemented properly or if the scaling up effort fails.

The WITS programs do not require a large upfront investment by potential users, making it relatively low risk. However, if the programs are found not to have an impact on the problem of bullying (usually due to improper implementation), than users will stop using the program. They will also probably tell others that the program was ineffective which could limit uptake of the programs and lead to failure of the scaling up effort. The most common reason for programs not to achieve their intended impact is because of improper program implementation. There is a relatively high risk to the Rock Solid Foundation if the programs are found to be ineffective because of improper implementation which could be a reason for the organization to choose an option with a higher level of control. At the same time because the organization does not have a lot of initial resources to invest in the scaling up effort, choosing a path that involves a lot of organizational growth (a tighter controlled scaling up effort) and would require a lot of investment poses a higher risk for the organization.

Returns – Refers to how well a strategy is at reaching the most people and achieving the intended impact most effectively.

Uptake of the WITS programs has been mixed in BC. In Victoria and the surrounding areas the program has been very successful at spreading and achieving impact. On the lower mainland the spread has been much slower and to-date the program has not spread much further than schools that received the initial program packages from Rock Solid. There are also communities that have introduced the WITS programs on their own, but because most of the program material is free online it is hard to know who these groups are and whether program implementation has been successful.
<table>
<thead>
<tr>
<th>Option</th>
<th>Readiness</th>
<th>Receptivity</th>
<th>Resources</th>
<th>Return</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Program</td>
<td>Organization</td>
<td>Program</td>
<td>Organization</td>
</tr>
<tr>
<td>1</td>
<td>High</td>
<td>Low</td>
<td>Medium – High</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>The program must be fully ready for scaling up</td>
<td>The organization only needs enough capacity to manage programs in the in-term and complete transfer</td>
<td>A recognized need for the innovation must already exist, but the adopting organization can stimulate demand by pairing it with its existing programs.</td>
<td>The main resources required will be staff time to transfer the programs.</td>
</tr>
<tr>
<td></td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>In this option growth happens more slowly so there is the opportunity to fine tune programs during the process.</td>
<td>The organization needs to be fully capable of supporting scaling up process on their own.</td>
<td>There must be both a recognized need for the innovation and a proven demand to justify branching into new communities.</td>
<td>The organization will be able to monitor implementation during the scaling up process, which will help maintain program quality and impact.</td>
</tr>
<tr>
<td>3</td>
<td>Medium-High</td>
<td>Medium – Low</td>
<td>Medium – High</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>The programs should be ready for scaling up so it is easier for partners to implement, but there is still opportunity for feedback and adjustment.</td>
<td>The organization needs to be able to support large-scale demand of programs and develop relationships, but can partner to deliver programs</td>
<td>There must be an existing need for the innovation, but the partner organization will play a large role in stimulating demand.</td>
<td>The organization will have less control over implementation and thus can’t guarantee impact, but can monitor partner organizations to ensure they maintain program quality</td>
</tr>
<tr>
<td></td>
<td>Medium</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Medium – High</td>
<td>Low</td>
<td>Medium – High</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Medium</td>
<td>High</td>
<td>Medium – High</td>
<td>Medium</td>
</tr>
</tbody>
</table>

**Table 3. Evaluating the three options against readiness, receptivity, resources, risk, and returns**
8.3 Recommendation

The WITS programs have been proven to be effective at reducing rates of relational and physical victimization and have been shown to work in a variety of different contexts. The next step for the WITS programs is to introduce the programs in communities across the country. The most promising option is #3: **Organizational growth and directed diffusion model: create a national organization and partner locally.**

Based on the analysis this option is the middle of the road option for the organization and would allow it to achieve the most returns, while maintaining a medium level of risk.

A national headquarters would increase the visibility of the programs, create a centralized hub for ongoing program development and evaluation, and allow for greater control of program dissemination. Partnering with local organization would raise the profile and legitimacy of the programs, while also sharing the cost of program implementation. The University of Victoria and Rock Solid Foundation have already been very successful at establishing and nurturing relationships with existing organizations in other parts of the country and the new national organization will be able to build off this success.
# SECTION 9 – IMPLEMENTATION STRATEGY

<table>
<thead>
<tr>
<th>Item</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PHASE 1 - Strategic Discussion</strong></td>
<td></td>
</tr>
<tr>
<td>Organize meeting to discuss the findings of this report</td>
<td>September</td>
</tr>
<tr>
<td>Consult with stakeholders (research partners, schools, community members) to gain better understanding of their needs as programs scale up and which scaling up method would best serve these needs</td>
<td>October</td>
</tr>
<tr>
<td>Decide which option to move forward with</td>
<td>November</td>
</tr>
<tr>
<td><strong>PHASE 2 - Research</strong></td>
<td></td>
</tr>
<tr>
<td>*Rest of strategy is based on if decide to move forward with option #3</td>
<td></td>
</tr>
<tr>
<td>Identify potential Board members to lead the new national organization (at least 8)</td>
<td>December/January</td>
</tr>
<tr>
<td>Start looking for office space in Ottawa</td>
<td>December/January</td>
</tr>
<tr>
<td>Generate list of potential national funding sources</td>
<td>December/January</td>
</tr>
<tr>
<td>Start looking for a consultant to facilitate strategic planning process for new organization</td>
<td>December/January</td>
</tr>
<tr>
<td><strong>PHASE 3 - Action</strong></td>
<td></td>
</tr>
<tr>
<td>Begin applying for funding for new organization (grants, government funding)</td>
<td>February</td>
</tr>
<tr>
<td>Convene first meeting of new Board to begin determining logistics:</td>
<td></td>
</tr>
<tr>
<td>- Name of organization</td>
<td>February</td>
</tr>
<tr>
<td>- Mission</td>
<td></td>
</tr>
<tr>
<td>- Role of each Board member</td>
<td></td>
</tr>
<tr>
<td>- Bylaws</td>
<td></td>
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<tr>
<td>- Decide on consultant and establish date to start strategic planning process</td>
<td></td>
</tr>
<tr>
<td>Start strategic planning process to determine:</td>
<td>March-June</td>
</tr>
<tr>
<td>- Vision for organization</td>
<td></td>
</tr>
<tr>
<td>- Goals for next 3 years</td>
<td></td>
</tr>
<tr>
<td>- Organizational needs</td>
<td></td>
</tr>
<tr>
<td>- Strategies to achieve goals</td>
<td></td>
</tr>
<tr>
<td>- Performance measures</td>
<td></td>
</tr>
<tr>
<td>Start developing a list of potential partner organizations in communities across Canada</td>
<td>May/June</td>
</tr>
<tr>
<td><strong>PHASE 4 - Launch</strong></td>
<td></td>
</tr>
<tr>
<td>Secure office space</td>
<td>July</td>
</tr>
<tr>
<td>Begin hiring staff and transferring existing staff to new organization</td>
<td>July</td>
</tr>
<tr>
<td>Start making contact with partner organizations that have been identified</td>
<td>July/August</td>
</tr>
<tr>
<td>Develop measurement tools to build into the WITS programs so that national organization can monitor impact as WITS spreads to new communities</td>
<td>August</td>
</tr>
<tr>
<td>Hire Fund Development Manager and begin working on funding strategy to secure long-term funding</td>
<td>August</td>
</tr>
</tbody>
</table>
SECTION 10 – CONCLUDING REMARKS

This project sought to answer the following questions:

"Based on the goals and objectives for the WITS Programs over the next 3-5 years and the external funding environment, what is an appropriate long-term sustainable funding model? Specifically:

- investigate how different organizations have developed models to fund and sustain their programs and services over the long-term
- identify resources and organizational frameworks required to successfully scale-up
- explore how different scaling up strategies might require different funding strategies and institutional structures

The report did this by: gaining a thorough understanding of the development of the WITS programs to date and the environment in which they exist; interviewing organizations that have successfully managed to grow and sustain their programs and services over the long-term; and surveying the literature on scaling up to determine factors that contribute to success.

The three main themes that came out of this study were that:

- Organizations need to approach scaling up strategically
- There is not one path towards sustainable funding, but many
- The model chosen for scaling up will have an impact on funding needs

The environmental scan showed that nonprofits are operating in a very challenging environment with multiple demands on their resources and more rigorous procedures to secure funding. As a result they need to be strategic in deciding how to focus their organization, where to allocate their resources, and who to partner with. All of the organizations interviewed demonstrated this strategic thinking and most had developed plans to guide day-to-day decision making. The literature review also emphasized the need for organizations to be focused and identified a number of factors for organizations to address before scaling up.

One of these factors was choosing a method of scaling up. The method of scaling up greatly influences what financial resources an organization needs to secure, what capacities it needs to build, and what strategic partnerships to pursue. Four main methods of scaling up were identified in the literature: uncontrolled diffusion, directed diffusion, takeover, and organizational growth. Each method offers varying degrees of control over the programs and services being disseminated.

The options presented were based on these four methods of scaling up and offer three different strategies for the Rock Solid Foundation to upscale the WITS programs and achieve sustainable long-term funding. The options are:

1. Takeover model: Find a large national organization to adopt the WITS programs
2. Organizational growth model: Expand the Rock Solid Foundation and branch into new locations
3. Organizational growth and directed diffusion model: Create a national entity and partner locally

The options were assessed against the criteria of readiness, receptivity, resources, risks, and returns to determine what the best scaling up strategy might be for the Rock Solid Foundation. It was determined that option #3: Organizational growth and directed diffusion model: Create a national organization and partner locally, would allow the organization to achieve the most returns, while requiring only a medium level of risk.
The next steps for the Rock Solid Foundation are: to have a strategic discussion with all of their stakeholders to determine the best path forward; begin identifying potential national funding partners; and develop built-in performance monitoring tools to measure impact in new communities.
REFERENCES


APPENDIX 1. WITS Programs Logic Model

Program: **WITS PROGRAMS** Logic Model

### Inputs
- Training materials (video, websites)
- Teacher accreditation online
- Program Manuals @ $15 each
- Program books $800 initially then $100 per year
- Take-home gifts $2.00 per child
- Help desk - staff part-time @ $2000 per month

### Activities
- **EMERGENCY SERVICES**
  - Swearing in ceremony
  - Follow-up visits
- **SCHOOLS**
  - Whole school implementation
  - Disciplinary action plan: code of conduct
- **TEACHERS**
  - Teachable moments
  - Lesson plans
  - WITS language
- **PARENTS**
  - Read pamphlet
  - USE language at home
- **CHILDREN**
  - Pledge to keep school safe
  - Use WITS language

### Outputs
- **Emergency Services**
  - Personnel
  - School administrations
  - Student athletes
- **All school staff**
  - Teachers
  - Playground supervisors
  - Cleaning staff
- **Children**
  - Teachers
  - Playground supervisors
  - Cleaning staff

### Participation
- **Students**
  - Children
  - Parents
  - Teachers

### Short
- Create safe and caring school culture
- Integrated victimization prevention and lesson plans
- Help seeking when victimization becomes normative
- School uses WITS language for cross-individual communication
- Increased child perceived safety in school
- Awareness of bystander effects

### Outcomes
- **Medium**
  - Achieve Social Responsibility Expectations
  - Reduced bullying and victimization & End chronic victimization
  - Increased child perceived safety at schools and home
- **Long**
  - Enhance mental health and healthy relationships
  - Reduce internalizing and externalizing problems

### Assumptions
- Community-wide interest
- Engagement of community champions from schools, emergency service providers, and parent groups
- Costs of program implementation (about $1200 per school) are feasible

### External Factors
- Community needs assessment for bullying concerns
- Rural and remote versus urban settings
- Tailoring program for local implementation
- Costs of program implementation
### APPENDIX 2. Timeline of WITS Program Development

<table>
<thead>
<tr>
<th>Phase</th>
<th>Year</th>
<th>Development</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1993</td>
<td>Principal Judi Stevenson of Lampson Street Elementary begins using the WITS acronym, which stands for Walk away, Ignore, Talk it out, and Seek help, to teach kids simple conflict resolution strategies.</td>
</tr>
<tr>
<td></td>
<td>1997</td>
<td>Local school police liaison Tom Woods and a group of local athletes and law enforcement officials launch the Rock Solid Foundation to provide violence prevention programs to elementary schools. Tom Woods approaches Judy Stevenson about creating an anti-violence program using the WITS acronym. Rock Solid and a group of counselors, teachers and principals from Greater Victoria School District #61 develop the original WITS Program for kindergarten to grade 3.</td>
</tr>
<tr>
<td></td>
<td>1998</td>
<td>Dr. Bonnie Leadbeater, child psychologist at the University of Victoria, and her research team join the group.</td>
</tr>
<tr>
<td></td>
<td>2000</td>
<td>WITS Program Evaluation Study #1 begins with funding from the BC Ministry of Education, CIHR, and SSHRC. Eleven program schools and six control schools are recruited to participate in the quasi-experimental longitudinal evaluation.</td>
</tr>
<tr>
<td></td>
<td>2001</td>
<td>The UVic Centre for Youth and Society (CYS) receives a $2M research grant from Community Alliances for Health Research (CAHR) to conduct 5 year study of the prevention of risks for youth intentional injuries. WITS is one of the programs they study.</td>
</tr>
<tr>
<td></td>
<td>2003</td>
<td>WITS Program Evaluation Study #1 ends. Findings show that relational victimization decreases in all the program schools. <a href="http://www.witsprogram.ca/pdfs/schools/wits-manuals/evaluation-chart.pdf">http://www.witsprogram.ca/pdfs/schools/wits-manuals/evaluation-chart.pdf</a></td>
</tr>
<tr>
<td><strong>Phase 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2004</td>
<td>UVic department of Psychology receives $20,000 from the American Psychological Foundation to develop the WITS LEADS programs in collaboration with Rock Solid, and Frank Hobbs and Lake Hill Elementary Schools. Program geared toward students in grade 4-6 and stands for Look and Listen, Examine choices, Act, Did it work, and Seek Help.</td>
</tr>
<tr>
<td></td>
<td>2005</td>
<td>UVic department of Psychology receives $143,740 Peer Victimization Grant from SSHRC to conduct evaluations of WITS programs in Greater Victoria School District #61. WITS is now in 77 schools in the greater Victoria area and is starting to spread to other schools in BC. The process of dissemination is mostly through face-to-face contact with schools by Victoria and Saanich Police Officers and the RCMP in Sooke. Tom Woods from the Rock Solid Foundation plays a large role in recruiting these community members to implement the program in their area.</td>
</tr>
<tr>
<td></td>
<td>2006</td>
<td>UVic department of Psychology receives $25,000 Research Cluster Grant to develop a network of national and international experts in the area of social aggression and peer victimization. PREVNet is established in Ontario through the Networks of Centres of Excellence – New Initiative program. PREVNet’s mission is to stop bullying in Canada and to promote safe and healthy relationships for all Canadian children and youth by creating a national network of leading research scientists and youth-serving organizations. Dr. Bonnie Leadbeater is one of the founding Board members of the Network.</td>
</tr>
<tr>
<td></td>
<td>2008</td>
<td>WITS Program Evaluation Study #2 begins with funding from SSHRC (see 2005 landmark). Six program schools and five control schools are recruited from Greater Victoria School District #61 to participate in the quasi-experimental longitudinal evaluation. WITS Program Evaluation Study #2 ends. Findings show that rate of decline in physical and...</td>
</tr>
</tbody>
</table>
relational victimization is significantly greater in program schools than control schools. Also find that teachers of program school's reported higher average levels of social responsibility, compared to control schools.
http://www.witsprogram.ca/pdfs/schools/wits-manuals/evaluation-chart.pdf

WITS programs are now introduced in every school in Greater Victoria and the Sooke School districts.

2010 The UVic department of Psychology receives a grant from the Public Health Agency of Canada (PHAC) to update the WITS website and develop online interactive training and information resources.

The Rock Solid Foundation secures a TELUS grant and Winnipeg Foundation grant to fund program materials for schools on the Lower Mainland and in Winnipeg. Dorian Brown, Executive Director of the Rock Solid Foundation personally calls school boards to let them know about the program and ask for interested schools. Program kits are given to schools on a first come, first serve basis.

2011 PREVNet becomes an NCE Knowledge Mobilization program with a mandate to co-create 10 sustainable Knowledge Mobilization Projects. WITS is one of these projects.

The Rock Solid Foundation and UVic research team partner with PREVNet researchers and the RCMP National Youth Officer Program to implement and study the WITS programs in rural communities across Canada. The partnership and study is supported through a $25,000 grant from the CIHR Knowledge Translation Program.

WITS Program Evaluation #3 begins. The UVic department of Psychology receives a second PHAC grant to conduct a two year randomized control trial in 27 schools in Alberta, Ontario and New Brunswick, and a qualitative evaluation of uptake, implementation, and sustainability in seven rural BC schools. UVic partners with Edmonton Safe and Caring Schools and Communities (SACSC), Carleton University, the University of Ottawa, and a staff member in New Brunswick to implement the programs and collect data.

A second TELUS grant and a Hamber Foundation grant are received to introduce the WITS programs to more lower mainland schools. The same process is undertaken as in 2010.

The WITS Programs Facebook page and Twitter account are launched.

2012 The Final Report of the WITS Programs Pilot Project (collaboration with the RCMP National Youth Officer and PREVNet) is released. The report lays out a number of recommendations for future program implementation in rural communities.

The UVic department of Psychology and the Rock Solid Foundation begin developing a French version of the WITS programs, DIRE, after receiving feedback from RCMP members that there is a need for this in immersion schools and Francophone communities. Funding for program development and evaluation is received from Heritage Canada, Service Canada and SSHRC.

The WITS Programs Pinterest account is launched.

2013 WITS Program Evaluation #3 ends. Final data results are being collected for both the quantitative and qualitative components of the study.

The UVic department of Psychology and the Rock Solid Foundation commission a report to help them determine how to develop a long-term sustainable funding model to support the upscaling of the WITS Programs.
APPENDIX 3. Interview Questions

Background information

I understand that your position is (title) at (name of organization). How long have you been in this position? How long have you been with the organization?

What is the nature of your responsibilities?

Organizational information

What is the size of your organization?

What is your operating budget?

How many years has the organization been around?

What services does your organization provide?

Funding information

What is your main source of funding?

What are your secondary sources of funding?

How did you come to develop this particular funding model (i.e. purposeful, accidental, etc)?

Are there any other funding options you’ve tried, but maybe didn’t continue with? Why?

How long have you been relying on your main source(s) of funding?

If your funding comes from some sort of corporate sponsorship, what was the process for developing this partnership?

Benefits/Challenges

What challenges exist within your current funding model?

How has your funding model benefitted your organization?

What resources (personnel, expertise, etc.) are required to maintain your funding model?

Are there any challenges you foresee in the future in terms of funding?

Final Remarks

Is there any advice you could give a small nonprofit looking to scale up its programs on a national level?
Do you know of any other organizations using innovative funding models to grow and sustain their services and programs that I should look at?

Is there anything else you would like to add?

Final question, can I use the name of the organization in the final report? And would you like to receive a copy of the final report once it's finished?
## Appendix 4. Models of Diffusion and Growth

<table>
<thead>
<tr>
<th>Description</th>
<th>Uncontrolled Diffusion</th>
<th>Affiliation/Collaboration/ Directed Diffusion</th>
<th>Takeover</th>
<th>Replication/Organizational Growth/Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>In uncontrolled diffusion the innovation is spread through the media, books, conferences, word of mouth, and professional networks. Self-appointed champions can take up the program, whether they have an affiliation with the originating organization or not.</td>
<td>The originating organization partners with local organizations to deliver the program. Formalized contracts specify the procedures &amp; practices to be shared by sites. Each organization is an independent legal entity.</td>
<td>Organization adopts deliberate strategy of being taken over by larger organization with the capacity to implement programs in new locations. The takeover organization is responsible for program dissemination and support.</td>
<td>The originating organization operates a national headquarters and dispatches teams to hire and train new staff for each local office. Local offices must adhere to strict program implementation standards and report back to head office. All units are legally part of one organization.</td>
</tr>
<tr>
<td><strong>Level of Control</strong></td>
<td>Very low</td>
<td>Medium</td>
<td>Medium-High</td>
<td>High</td>
</tr>
<tr>
<td>Complexity of Program</td>
<td>Program must be simple to replicate and not dependent on training or organizational structures. Programs often adapted for local conditions.</td>
<td>Program must be easy to replicate and not require a lot of training to ensure the program is implemented properly.</td>
<td>Program can be more complex because there is the opportunity to transfer knowledge to the organization taking over.</td>
<td>This option is good if the program is more complex and requires more hands on training/support to ensure fidelity.</td>
</tr>
<tr>
<td>Desired Speed of Scaling</td>
<td>Occurs very quickly. There is a higher risk of losing integrity of program(s) because implementation is not controlled.</td>
<td>Scaling can occur fairly quickly. The speed of scaling will be largely based on how quickly partnerships can be established.</td>
<td>Speed of scaling will depend on if organization has already been identified to takeover or if one has to be found.</td>
<td>Replication is slower because it requires hiring and training new staff for each new site.</td>
</tr>
<tr>
<td>Resources Available for Scaling</td>
<td>Need very little resources because programs are implemented by others and use existing networks to share information.</td>
<td>Some investment of resources to provide outreach and support to local organizations.</td>
<td>Initial investment of resources to develop program and transfer knowledge.</td>
<td>Fairly large investment of resources needed upfront to create new sites.</td>
</tr>
</tbody>
</table>

*Note. Table based on information gathered from Kohl & Cooley, 2005, p.9-10; Dees et al., 2004, p.28-29; LaFrance et al., 2006, p.6; Sezgi & Mair, 2010, p.31, Mulgan et al., 2007, p.17-18*
# Appendix 5. Projected Budget for Rock Solid Foundation - Option #2

<table>
<thead>
<tr>
<th>Personnel Expenses</th>
<th>Projected Costs</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Senior Management Team</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Director</td>
<td>$81,900.00</td>
<td>1 FTE @ $45/hr</td>
</tr>
<tr>
<td>Employer's share of payroll deductions @ 11%</td>
<td>$9,009.00</td>
<td>Paid for each employee</td>
</tr>
<tr>
<td><strong>Senior Management Subtotal</strong></td>
<td>$90,909.00</td>
<td></td>
</tr>
<tr>
<td><strong>Staff Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educational Technologist</td>
<td>$36,480.00</td>
<td>0.5 FTE @ $40/hr</td>
</tr>
<tr>
<td>Fund Development Manager</td>
<td>$63,700.00</td>
<td>1 FTE @ $35/hr</td>
</tr>
<tr>
<td>Communications Coordinator</td>
<td>$31,850.00</td>
<td>0.5 FTE @ $35/hr</td>
</tr>
<tr>
<td>Office Administrator</td>
<td>$45,500.00</td>
<td>1 FTE @ $25/hr</td>
</tr>
<tr>
<td>Resource Coordinator</td>
<td>$40,400.00</td>
<td>1 FTE @ $22/hr</td>
</tr>
<tr>
<td>Summer Students</td>
<td>$10,000.00</td>
<td>80% covered by grant</td>
</tr>
<tr>
<td>Employer's share of payroll deductions @ 11%</td>
<td>$25,072.30</td>
<td>Paid for each employee</td>
</tr>
<tr>
<td>Accountant</td>
<td>$10,000.00</td>
<td>Yearly audit</td>
</tr>
<tr>
<td><strong>Staff Expenses Subtotal</strong></td>
<td>$263,002.30</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL PERSONNEL EXPENSES</strong></td>
<td>$353,911.30</td>
<td></td>
</tr>
</tbody>
</table>

<p>| Nonpersonnel Expenses | | |
| <strong>Office Space</strong> | | |
| Rent | $50,000 | Warehouse/office space combo. Estimated at $20/sq ft for 2500 sq ft. (incl. utilities) |
| Furnishings | $5,000.00 | Desks, chairs, etc |
| Insurance | $2,000.00 | |
| <strong>Office Space Subtotal</strong> | $57,000.00 | |
| <strong>Equipment/Supplies</strong> | | |
| Office supplies | $6,000.00 | |
| Printing | $20,000.00 | |
| Postage and Delivery | $5,000.00 | |
| Phone/Fax/Internet | $3,000.00 | |
| Repairs/Maintenance | $1,000.00 | |
| Computer Equipment (software, etc) | $2,000.00 | At least one new computer |
| Books | $33,200.00 | |
| School Supplies | $60,000.00 | |
| <strong>Equipment/Supplies Subtotal</strong> | $130,200.00 | |</p>
<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awards/Grants</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>Conference Attendance</td>
<td>$25,000.00</td>
</tr>
<tr>
<td>Travel, per diem, registration</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td></td>
</tr>
<tr>
<td>Registration</td>
<td>$100.00</td>
</tr>
<tr>
<td>Synergy Networks</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Domain names (3 x $10)</td>
<td>$30.00</td>
</tr>
<tr>
<td>BoxNet (central repository)</td>
<td>$120.00</td>
</tr>
<tr>
<td>Web Hosting</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>$10,000.00</td>
</tr>
<tr>
<td><strong>Marketing/Communications Subtotal</strong></td>
<td><strong>$53,250.00</strong></td>
</tr>
<tr>
<td><strong>TOTAL NONPERSONNEL EXPENSES</strong></td>
<td><strong>$240,450.00</strong></td>
</tr>
<tr>
<td><strong>TOTAL DIRECT COSTS</strong></td>
<td><strong>$594,361.30</strong></td>
</tr>
</tbody>
</table>
Appendix 6. Potential Organizational Chart for Option #2

**University of Victoria, Research Partnership**
- Role: Ongoing program development, evaluation, and research
- Responsibility: Dr. Bonnie Leadbeater

**Board**
- Role: Provide guidance and support for the national organization
- Position: Volunteer

**Executive Director**
- Role: Operations management, financial oversight, strategic planning, marketing, public outreach
- Position: Full-time

**Office Administrator**
- Role: Administrative support & bookkeeping
- Position: Full-time

**Educational Technologist**
- Role: Online training, book acquisitions & lesson plans
- Position: Part-time

**Resource Coordinator**
- Role: Processing orders from local teams, management of stock, coordinating shipping
- Position: Full-time

**Fund Development Manager**
- Role: Grant writing, donor relations, business partnerships
- Position: Full-time

**Communications Coordinator**
- Role: Web support, graphic design, social media, marketing
- Position: Part-time

**Local Head Office Victoria, BC**

**Local Branch**
- Role: Disseminate, implement program locally
- Positions: Director & Support Personnel (1-2)

**Local Branch**
- Role: Disseminate, implement program locally
- Positions: Director & Support Personnel (1-2)

**Local Branch**
- Role: Disseminate, implement program locally
- Positions: Director & Support Personnel (1-2)
### Appendix 7. Projected Budget for National Organization – Option #3

<table>
<thead>
<tr>
<th>Personnel Expenses</th>
<th>Projected Costs</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Senior Management Team</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Director</td>
<td>$81,900.00</td>
<td>1 FTE @ $45/hr</td>
</tr>
<tr>
<td>National Outreach Coordinator</td>
<td>$72,800.00</td>
<td>1 FTE @ $40/hr</td>
</tr>
<tr>
<td>Employer’s share of payroll deductions @ 11%</td>
<td>$17,017.00</td>
<td>Paid for each employee</td>
</tr>
<tr>
<td><strong>Senior Management Subtotal</strong></td>
<td>$171,717.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Expenses</th>
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<th>Notes</th>
</tr>
</thead>
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<tr>
<td>Educational Technologist</td>
<td>$36,480.00</td>
<td>0.5 FTE @ $40/hr</td>
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<tr>
<td>Fund Development Manager</td>
<td>$63,700.00</td>
<td>1 FTE @ $35/hr</td>
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<td>Communications Coordinator</td>
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<td>Yearly audit</td>
</tr>
<tr>
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<td></td>
</tr>
</tbody>
</table>

| **TOTAL PERSONNEL EXPENSES** | $434,719.30 | |

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td>Furnishings</td>
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<td>Desks, chairs, etc</td>
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<tr>
<td>Insurance</td>
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<td></td>
</tr>
<tr>
<td><strong>Office Space Subtotal</strong></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Equipment/Supplies</th>
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<tr>
<td>Office supplies</td>
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<td>Postage and Delivery</td>
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<td>School Supplies</td>
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<td><strong>Equipment/Supplies Subtotal</strong></td>
<td>$130,200.00</td>
<td></td>
</tr>
<tr>
<td>Marketing/Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------</td>
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<td></td>
</tr>
<tr>
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<td>$240,450.00</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL DIRECT COSTS</strong></td>
<td>$675,169.30</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 8. Potential Organizational Chart for Option #3

**Executive Director**
Role: Operations management, financial oversight, strategic planning, marketing, public outreach
Position: Full-time

**Office Administrator**
Role: Administrative support & bookkeeping
Position: Full-time

**National Outreach Coordinator**
Role: Development of strategic partnerships, coordination of national marketing campaigns, oversight of local dissemination teams
Position: Full-time

**Board**
Role: Provide guidance and support for the national organization
Position: Volunteer

**University of Victoria, Research Partnership**
Role: Ongoing program development, evaluation, and research
Responsibility: Dr. Bonnie Leadbeater

**Educational Technologist**
Role: Online training, book acquisitions & lesson plans
Position: Part-time

**Resource Coordinator**
Role: Processing orders from local teams, management of stock, coordinating shipping
Position: Full-time

**Fund Development Manager**
Role: Grant writing, donor relations, business partnerships
Position: Full-time

**Communications Coordinator**
Role: Web support, graphic design, social media, marketing
Position: Part-time

**Local Dissemination Partners**
Role: Community outreach, school liaison, training, coordination of resource materials with main office
Position: Partnership with existing local organizations

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