

WOMEN IN NEED SOCIETY (WINS) SOCIAL ENTERPRIZE CASE STUDY 2017

Prepared for:
Trico Charitable Foundation

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INTRODUCTION BY TRICO CHARITABLE FOUNDATION

Storytelling is one of the most powerful forces in humanity.

Established in 2008, the Trico Charitable Foundation seeks to close gaps in society by provoking innovation and building capacity in social entrepreneurship¹.

Trico's biennial Social EnterPrize has celebrated and advanced leadership and excellence in social entrepreneurship in Canada since 2011. While the benefits to the recipients of prize money and profile are substantial, they pale in comparison to the power of the recipients' stories, when told well, to enlighten, inspire, and galvanize a world desperately in need of solutions to its social problems. The case study you are reading is but one in a series featuring all of our Social EnterPrize recipients.² The subjects and the authors of the studies are as follows:

Social Enterprise	Post-Secondary Institution	Target Release Date
The Cleaning Solution	Sauder Centre for Social Innovation & Impact Investing, Sauder School of Business, The University of British Columbia	November 01, 2017
Women in Need Society (WINS)	Hunter Centre for Entrepreneurship and Innovation, University of Calgary; Institute for Community Prosperity, Bissett School of Business, Mount Royal University; and Professional and Continuing Studies, Chiu School of Business, Bow Valley College	September 13, 2017
Groupe Convex	Ontario Institute for Studies in Education, University of Toronto	July 12, 2017
Mission Possible	Okanagan School of Business, Okanagan College	May 10, 2017

¹ Social enterprises are organizations, for-profit or not-for-profit, that blend the social and the entrepreneurial by using business models/markets to solve social problems. Trico sees "social entrepreneur" as the person, "social enterprise" as the organization, and "social entrepreneurship" as the activity.

² The previously released case studies can be found at: <https://tricofoundation.ca/social-enterprize/>

Potluck Café Society	RADIUS (Radical Ideas, Useful to Society), Beedie School of Business, Simon Fraser University	March 08, 2017
JUMP Math	QSB Centre for Social Impact, Queen's School of Business	May 20, 2015
EMBERS Staffing Solutions	Sauder Centre for Social Innovation & Impact Investing, Sauder School of Business, The University of British Columbia	May 06, 2015
TurnAround Couriers	Diversity Institute, Ted Rogers School of Management, Ryerson University	April 22, 2015
YWCA Metro Vancouver Hotel/Residence	Okanagan School of Business, Okanagan College	April 08, 2015

In the introduction to the first round of the studies in 2015 we said:

“Storytelling is no easy task, and these are no average journeys. For us, these stories have challenged our assumptions and have taken us deeper into social enterprises than we had seen before. The studies have exceeded our wildest expectations. For that, credit is due to each recipient, not only for their leadership, but their candour; and to each post-secondary institution, for its hard work and thoughtful analysis.”

As the catalogue of our case studies grows we continue to be amazed by the individual insights, but find ourselves increasingly intrigued by the trends across the studies. So much so that we have codified some of the key patterns in a publication called “Building on Getting Beyond Better: Rethinking Social Entrepreneurship” (BonGGB)³.

BonGGB suggests there are two basic ways the social and the entrepreneurial can blend in social entrepreneurship: 1) the degree to which the social model addresses the customer’s needs and 2) how the social model impacts market

³ “Building on Getting Beyond Better: Rethinking Social Entrepreneurship” (BonGGB) report can be found here: https://tricofoundation.app.box.com/files/0/f/19382726904/1/f_138269370699

value. In turn, each of these basic blends can take one of three forms: a blend that is disconnected, a blend that is in harmony, and a blend that is synergistic.

These patterns form a blend matrix (what we call The Blender) that is surprisingly effective in diagnosing the challenges and opportunities any social enterprise will face as a result of its social and entrepreneurial blend.

THE BLENDER

A KEY PREDICTOR OF THE OPPORTUNITIES AND CHALLENGES A SOCIAL ENTERPRISE WILL FACE IS THE WAY IT BLENDS THE “SOCIAL” AND THE “ENTREPRENEURIAL”. THESE BLENDS CAN OCCUR IN TWO GENERAL WAYS, AND EACH HAS THREE LEVELS.

The degree to which the social model addresses the customer's needs:		How the social model impacts market value:
<p>The social model does not have a role in addressing the customer's needs, but the purchase funds the social model (often there is a customer desire to 'buy social').</p> <p><i>Planning prognosis:</i> definite challenges ahead (the pressure of 'multi-tasking', the pressure of customer persuasion)</p>	<p>The diagram illustrates 'The Blender' with three levels of blend. At the top, 'SOCIAL' (blue) and 'ENTREPRENEURSHIP' (yellow) are separated by 'DISCONNECT'. In the middle, 'SOCIAL' (blue) and 'ENTREPRENEURSHIP' (yellow) are side-by-side, labeled 'HARMONY'. At the bottom, they are combined into a green oval labeled 'SOCIAL ENTREPRENEURSHIP' and 'SYNERGY', with a sub-note: 'A true blend: inseparably intertwined & immediately reinforcing'.</p>	<p>The social model adds costs that can't be passed on to the customer.</p> <p><i>Planning prognosis:</i> definite challenges ahead (the pressure of the funding gap)</p>
<p>The social model has a role in addressing the customer's needs but that role could be replaced by a traditional business (the customer's needs being addressed are over and above any desire to 'buy social').</p> <p><i>Planning prognosis:</i> possible challenges ahead (the pressure of competition).</p>		<p>Social model adds costs that can be passed on to the customer.</p> <p><i>Planning prognosis:</i> possible momentum (the security of affordability)</p>
<p>The social model has an irreplaceable role in addressing the customer's needs (the customer's needs being addressed are over and above any desire to 'buy social').</p> <p><i>Planning prognosis:</i> definite momentum (the power of unique value).</p>		<p>Not only may the social model add costs that can be passed on to customer, it produces an enhanced value proposition that leads to competitive advantage (over and above any desire to 'buy social').</p> <p><i>Planning prognosis:</i> definite momentum (the power of unique value)</p>

We know we are just beginning to understand the enormous potential of social enterprise, in its own right, and, more importantly, in how it can work with the philanthropic, for-profit, not-for-profit and government sectors to create social impact. We hope you enjoy these studies, and that they entice you to tell your story. We are eager to hear from you @tricofoundation and will continue to share our insights at www.tricofoundation.ca.

1. INTRODUCTION TO WINS

Calgary's Women In Need Society (WINS) has a strong track record of demonstrating value and support to many of the city's most disadvantaged people. Since its outset, the goal of WINS has been to create "a space where women who are struggling could get what they needed in an environment where they had dignity and choice."⁴

Ms. Catherine Tkach, founded the Calgary Agency Network for Women in Need Society in response to identification of the challenges of accessing resources within the City of Calgary in the early 1990s. The platform Ms. Tkach created was based on the provision of practical and easily accessible resources to women who were struggling with domestic violence and addiction. Regardless of their circumstances, women and their families were provided much needed household items, clothing, and access to a family resource centre.

Key Insight: Like many entrepreneurial ventures, the idea for WINS emerged from a need arising from personal experience, the identification of a gap in the current offerings, and then deciding to do something about it!

At the heart of WINS model are the thrift stores, accepting household items for resale as well as providing 'free goods referrals' to women in need. WINS' early years were marked by substantial growth in response to the city's growing needs, arising from a rapidly expanding economy, followed at times by equally rapid contractions throughout the 1990s and into the 2000s. From its humble beginnings of a single store, its expansion has been dramatic and today WINS' four stores are recognized as destination social enterprise thrift stores specializing in "gently-used" and "amazingly affordable" everyday apparel and household items. The proceeds generated in the thrift stores are used to support the programs that are delivered

⁴ Calgary Foundation, Community Knowledge Centre.
<http://ckc.calgaryfoundation.org/org/women-need-society-calgary-wins>

throughout the community. In addition, WINS has grown to include six Family Resource Centres located throughout the City of Calgary. As Laura Dickson, Executive Director for WINS at the time this case study was prepared, explains:

“WINS began in 1992, so we’re coming up on our 25th anniversary. It grew out of the opportunity to offer dignity to women who were fleeing domestic violence or who were newcomers to Canada and starting over with their lives. To give them an experience to select the items that they needed for themselves and their family to start over; having a choice and dignity as I mentioned was a big driver behind that.”

WINS works with women and their families facing a range of challenges – financial, in the process of leaving shelters, outfitting a home, adapting to a new city or country, or single parents caring for their children. For many of the organization’s clientele, WINS is a first step in realizing new lives.

Key Insight: Social enterprises engage and serve numerous stakeholders, and therefore have to be flexible in where they direct their efforts. Organizations without such a strong social mission can potentially streamline their efforts into a single focus to maximize profits. Ideally, there would be synergies between the diversity of needs, but when there is not, the social enterprise must maintain balance which means assigning an equivalent priority to social needs over other considerations.

Recognizing Calgary’s changing economic climate, natural disasters, and global events, demand on WINS continues to grow and change over time. Calgary Foundation’s 2016 community report, Vital Signs, notes there are a number of indicators pointing to the growing need for services such as those offered by WINS:

- 1400 Syrian refugees settled in Calgary in 2016²
- Youth unemployment rate in Calgary has increased 3.7% over 2015

- The number of Employment Insurance recipients in Calgary doubled in 2016 over 2015 to 21,100²
- The number of Calgary Food Bank clients is projected to reach 170,000 in 2016, versus 141,271 in 2015²
- 1 in 10 Calgarians live in poverty and 10% of Calgary's children live in poverty.³

1.1 AN EVOLUTION AND A JOURNEY

WINS has grown from a one stop shop resource centre and thrift store to an award winning not-for-profit organization and shopping alternative for individuals interested in investing in the social fabric of Calgary communities. Operating four thrift stores, a centralized sorting and distribution center, and six family resource centres, WINS works with 80 partner agencies acting as a conduit to provide important connections to clients for the resources they require. Throughout all of its work, the overall mission of the organization remains the same.

WINS Mission: Helping women and their families help themselves.

WINS operates as a charitable not-for-profit organization registered under the Alberta Societies Act. It is able to balance its charitable mandate with growth by virtue of its complementary non-profit structure. WINS is guided by a volunteer board of directors that provide input and oversight at a governance level.

Over the years WINS has nurtured partner relationships with local social service agencies to help clients on their path to self-sufficiency. As a client's needs shift from the most basic everyday necessities, the support from WINS also changes. Leveraging their relationships and partnerships over time has enabled WINS to act as a conduit for clients to access a wide range of resources and capacity building services – all of which align with the organization's vision.

Table 1 below presents a summary of the key milestones throughout the organization's 25-year history. The timeline traces how WINS has adapted its programs and service delivery models to the changing needs of its clients and stakeholders while remaining consistent with its organizational mandate.

Table 1. Summary of WINS key milestones over the past 25 years

Year	Milestone
1992	<ul style="list-style-type: none"> • The Community Agency Network for Women In Need Society (WINS) is incorporated. • WINS's first and second Thrift Stores (14th Street and Macleod Trail) begin accepting donations of household goods for sale at bargain prices and for free goods referrals to women in need.
1993	<ul style="list-style-type: none"> • First Parent-Child Resource Centre opens at Shaganappi Village with support from Calhome Properties. • WINS is awarded charitable status.
1994	<ul style="list-style-type: none"> • Third and fourth Thrift Stores open at Bowness Road and Horton Road. • Second and third Parent-Child Resource Centres (Bridgeland and Southwood) open. • WINS receives funding for the first time from the Calgary and Area United Way. • WINS works with a variety of community partners to deliver programming in its resource centres.
1995-96	<ul style="list-style-type: none"> • Pick-up and delivery service begins for donated goods with the addition of two trucks. • Fifth Thrift Store opens in Forest Lawn district.

	<ul style="list-style-type: none"> WINS continues to grow funders and supporters: City of Calgary (MATCH Solutions), Junior League, Wild Rose Foundation, Calgary Health Region and Calgary Catholic Immigration Society.
1997	<ul style="list-style-type: none"> Sixth Thrift Store opens at Richmond Road. United Way of Calgary funding support allows WINS to increase hours of programming at the Parent-Child Resource Centres. Bowness Thrift Store relocates to larger space.
1998	<ul style="list-style-type: none"> Southwood Parent-Child Drop-In Centre closes. Collaboration begins with Calgary Immigrant Women's Association (CIWA). Dover Thrift Store opens and Forest Lawn store closes.
1999	<ul style="list-style-type: none"> Vista Landing Thrift Store opens.
2000	<ul style="list-style-type: none"> Multi-year funding for Parent-Child Drop-in Centres from United Way of Calgary and Area.
2001	<ul style="list-style-type: none"> Parent-Child Centres renamed Family Resource Centres as part of effort to be more inclusive of all family members. Fleet expansion continues with support of Calgary Community Lottery Board. Construction completed on new administrative offices at the Dover Thrift Store.
2002	<ul style="list-style-type: none"> Celebrates 10th Anniversary. A "Collectible and Cool Stuff" boutique opens at Dover Thrift Store. Name officially changed to Women In Need Society of Calgary. WINS closes Horton Road Thrift Store.
2003	<ul style="list-style-type: none"> Fisher Park Thrift Store opens. WINS opens a third Family Resource Centre at Hillhurst.

2004	<ul style="list-style-type: none"> • Vista Landing Store closes. • Cool Stuff and Collectibles moves from Dover location to Heritage Antique Market.
2006-2011	<ul style="list-style-type: none"> • Carmen Sparrow serves as Executive Director.
2011-2014	<ul style="list-style-type: none"> • Cathy Coutts serves as Executive Director. • Family Resource Centre expansion continues, with the addition of 10th Street, Bridgeland Place, Erinwoods and Temple locations. • 13000 ft² warehouse space added. • Retail strategy launched. • Merchandise inventory system implemented in four stores. • Dispatching and programs/services databases developed and implemented with the support of the Calgary Foundation.
2014-16	<ul style="list-style-type: none"> • Laura Dickson hired as Executive Director. • WINS recognized for excellence in social entrepreneurship through national, biennial Trico Social Enterprise Award. • WINS launches multi-year strategy to position itself for growth, including alignment of organizational structure to strategy with hires of Brian Lloyd, Operations Manager and Vera Ilhnyckj, Marketing Manager. • Reach target of 85% self-funded. • Family Resource Centre services record 20,325 in total number of services provided (up from 7,555 in 2014). • WINS reaches \$0.5M in merchandise issued annually through its Free Goods program. • WINS introduces 1:1 client goal planning and management to the services offered through FRCs. • Five year funding awarded by Calgary and Area United Way through Strong Communities RFP. • Emergency Resiliency Funding awarded by City of Calgary in support of WINS Free Goods Referral Program. • CRM system migrated to Kindful to improve donor stewardship.

2017	<ul style="list-style-type: none"> • 25th Anniversary Promotional Campaign. • FRCs at Hillhurst and 10th Street close to focus resources on higher traffic locations.
2020	<ul style="list-style-type: none"> • Reach target 100% self-funded.

Key Insight: While the mission for the organization has remained reasonably stable over time, it is the “how” and the manner in which that mission is executed that is most noteworthy. To remain relevant, it is essential that the needs of clients and stakeholders are regularly assessed.

1.2 COMMUNITY PROGRAMS AND SERVICES

WINS Vision: Women have the resources, knowledge, skills and confidence to achieve self-sufficiency.

In an effort to deliver on its vision and mission, WINS provides services and programming through three mechanisms: (i) Family Resource Centres (FRCs), (ii) Free Goods Referral Program, and (iii) Thrift Stores.

Family Resource Centres: The six FRCs are located in deep subsidy housing complexes in every quadrant of the city.

The FRCs serve as important community hubs by providing families with barrier free access to essential programs, services and resources. Furthermore, the FRCs are an integral component of the WINS delivery model. They foster community building at the neighborhood level, while providing a wide range of services including: English as a Second Language, parenting workshops, women’s groups, kids’ clubs, family engagement sessions, public access computers, employment support in addition to linkage to other community agencies and resources.

A recent client survey by WINS highlighted the importance of the FRCs to communities, with respondents identifying opportunities to build friendships, share experiences, and learn new skills as important qualities of the FRCs. While the specific metrics reported have shifted over time, Table 2 demonstrates a consistent demand for FRC services over the past 3 years, almost doubling from 2014 to 2015. Of particular note, WINS FRCs referred about 25% of the total number of clients served through WINS' own free goods services in 2016, which indicates more individuals seeking help at WINS FRCs are challenged to meet basic needs.

Table 2. Demand for FRC services over the past 3 years.

	2016	2015	2014	%
Number of Services Provided	20,325	12,045	7,555	+169%
Number of Individuals Served	13,941	10,000	5,357	+160%
Number of Unique Individuals	2,600	1,795	1,400	+86%
Number of FGRP Referrals Issued	835	464	301	+177%

Free Goods Referral Program (FGRP): The Free Goods Referral Program provides much needed goods and household items to women and their families based on demonstrated need. In addition to those referrals provided by WINS FRCs (Table 2), more than 80 Calgary based agencies partner with WINS, helping to identify women requiring much needed support. Using a voucher system, clients are provided access to the program and are able to select items required to furnish their homes and clothe their families. Larger household items are also available and, when necessary, these items are delivered to clients at no cost. The success of the Free Goods Referral Program is grounded on a model of client empowerment and self-reliance. Rather than simply providing clients with household items, clients are empowered and encouraged to select what they need⁵. Approximately

⁵ <http://ckc.calgaryfoundation.org/org/women-need-society-calgary-wins>, Accessed November 22, 2016

\$500,000 worth of goods are provided through the Free Goods Referral Program every year.⁶

Thrift Store Social Enterprises: The four thrift stores sell affordable goods. These retail stores carry a wide range of merchandise including a selection of clothing, accessories, housewares and furniture. The majority of merchandise sold originates from donors who contribute ‘gently used’ clothing, household items, or furniture to WINS for resale. As well, in a small number of instances, some local businesses have donated new merchandise and/or end of the line sales items they no longer wish to carry. The revenue generated through the retail store operations supports WINS’ community programs and operations.

From time to time, WINS partners with Calgary Immigrant Women’s Association’s Retail and Administrative training programs to provide volunteer experiences. Based on the core tenets of respect, integrity, responsibility, teamwork, and empathy, the goal of this program is to provide on-the-job coaching, training and support to women who are seeking employment⁷.

1.3 SOCIAL ENTERPRISE CONTEXT

Alberta’s social enterprise landscape continues to grow and expand. According to the Alberta Social Enterprise Sector Survey Report, as of spring 2014, there were 383 confirmed social enterprises operated by Alberta based nonprofit organizations. Of the 101 survey participants, 60% of respondents indicated they were most likely to operate their social enterprise at the scale of a neighborhood or local community. Additionally, study results suggest that individual stakeholders within a social enterprise often had multiple intersecting connections within the organization.¹⁰

⁶ Interview with Laura Dickson, Executive Director, WINS, 2016

⁷ <http://ckc.calgaryfoundation.org/org/women-need-society-calgary-wins>, Accessed November 22, 2016

The WINS approach to its operations is consistent with the survey results in that the thrift stores and resource centers are largely embedded in Calgary communities. Moreover, it is not unusual for WINS' donors to be clients or to work as volunteers in its retail stores, distribution centre and Free Goods Office or Family Resource Centres.

Within this ecosystem, WINS is an environmentally conscious organization dedicated to repurposing, upcycling, and recycling gently used items for the social good. Working toward a triple bottom line that considers social, environmental and financial measures of success, when donors choose to repurpose household items and clothing, they are helping the agency to not only generate funds in support of programming, but to also build community wellbeing and social capital within the city.

Key Insight: Hybrid social enterprises that combine commercial activity while delivering on a social or environmental mission have access to the unique perspective of potentially having individuals who are clients of the services, a customer for the commercial offerings, a volunteer, and an employee at various points in time.

2. THE CHALLENGES

WINS faces challenges stemming from nature of the industry in which it operates, the shifting competitive landscape, and the need to align internal operations with these changing realities. The industry is seasonal and cyclical in nature, with demand for second hand items and social support services increasing as the economy worsens. There is an increasing level of sophistication among competitors in the thrift store retail market, with WINS facing competition from 'for-profit' as well as 'not-for-profit' entities. In many cases, it is not always clear to potential donors or customers if their contributions are going to support a registered charity or a for-profit organization. Internally, there are the combined operational challenges of blending a volunteer and paid workforce, disparate internal processes across sites and facilities, and how to meet the growth in demand for social services

through social enterprise revenue.

2.1 USED GOODS INDUSTRY

The used goods industry is in its maturity phase within Canada in that the competitive environment is tight and market entry is fluid. The industry is countercyclical, in that poor economic conditions in the country or region tend to drive improved revenues. With improving economic conditions, it is anticipated that revenue growth will slowly increase at an annual rate of 1.1% from its current \$1.4 billion in revenue.⁸ This is compared to the US market with currently \$18 billion in revenue and annual growth of 3.3% projected over the next five years.⁹

Within the Canadian used merchandise industry, many non-profit organizations including Goodwill, Saint Vincent de Paul, and the Salvation Army, are among the largest retailers of second-hand goods in the country. While the province of Ontario reports the largest number of stores in Canada with 1,070 retail outlets; as of December, 2014, Alberta reported 282 used merchandise retail outlets.¹⁰

Retail sales in Alberta, previously very strong, have declined approximately 1.7% over 2014 and 2.1% since the beginning of 2015.¹¹ With a 65% reduction in oil prices in 2015, Albertans are seeing reductions in capital and operating expenditures by corporations in the local and provincial economy accompanied by significant decreases in employment in the oil industry.¹²

It is important to point out that as an economy encounters a downturn, demand increases for second-hand products and merchandise. At the same time, however, donations in terms of dollars and quality of donated product

⁸ Morea, S. (2016). Used Goods Stores in Canada. IBISWorld Industry Report 45331CA.

⁹ Hurley, M. (2016) Used Goods Stores in the US. IBISWorld Industry Report 45331.

¹⁰ Statistics and Facts on the Second-hand Goods Industry in Canada, n.d.

¹¹ Canadian Retailers Are Increasingly Facing Stronger Headwinds, August 17, 2015

¹² Canadian Retailers Are Increasingly Facing Stronger Headwinds, August 17, 2015.
<http://www.retail-insider.com/retail-insider/2015/8/headwinds>

tend to decrease due to possible reductions in discretionary income normally earmarked for donation combined with a tendency of donors to retain merchandise longer. As a consequence, competition among thrift stores for donors and customers increases considerably.

2.2 COMPETITION

In the Calgary market the primary competitor in the resale industry is Value Village, a for profit organization founded in 1954 in the United States. It has 330 stores across the United States, Canada, and Australia and four locations in Calgary. Its slogan is Shop, Reuse, Reimage. Value Village offers quality, gently used clothing, accessories, and household goods and its business model consists of purchasing, reselling and recycling.¹³

The second largest competitor for WINS is Goodwill Industries of Alberta, with seven locations in Calgary. It supports Albertans experiencing disabilities and it is a non-profit organization. The first store was established in Edmonton and opened in 1963. In 1969, Goodwill established their first partnership and funding relationship with the United Way. By 2014, Goodwill Industries generated \$5.37 billion in retail sales in the United States from online sales and revenue earned at more than 2,000 not-for-profit resale stores.¹⁸

The third largest competitor, WorldServe Ministries Canada, strives to serve the local market while making an impact globally. WorldServe Ministries Canada opened one thrift store in Calgary in January 2013. The business is managed by staff and volunteers and it is the main competitor of the WINS' furniture division.¹⁴

While Value Village, Goodwill Industries, and WorldServe Ministries represent significant competition for donated goods (as well as retail customers), one of the toughest low-cost competitors for retail customers is Walmart with its

¹³ Value Village website: About Us, n.d.

¹⁴ Interview with Laura Dickson, Executive Director, WINS

12 stores located throughout Calgary. For budget conscious shoppers, Walmart stores are recognized as providing comparable pricing for new items due to its massive purchasing power and tightly controlled distribution network.

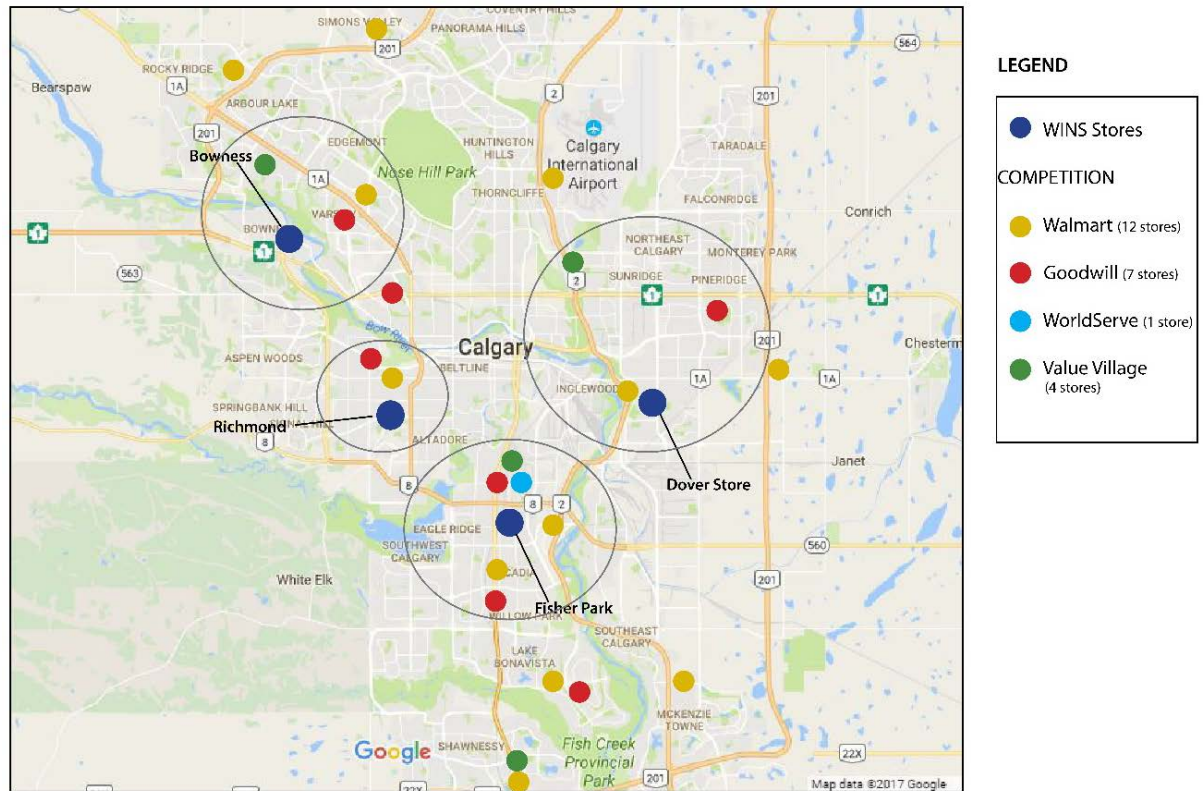


Figure 1. WINS locations in relation to competitors (Adapted from “A Retail Strategy for WINS”, JCWG, 2014)

Figure 1 highlights the location of the WINS stores in relation to the competition. Clearly, customers have a choice in not only where to donate their gently used goods but also where to purchase goods. The circles around each location approximates where 75% of each WINS store’s customers reside. This indicates that for example, while the Bowness, Richmond, and Dover locations are arguably neighbourhood locations, the Fisher Park location is a destination store with a significantly larger catchment and surrounding retail offering customers the opportunity for

cross-shopping. There is also a significant competitor in online marketplaces like those offered for Kijiji that tend to draw both potential customers and large sources of used goods that could potentially be directed to organizations like WINS¹⁵.

Key Insight: Competition takes on a different tone between social enterprises. There is a desire to remain ahead of others in the marketplace; however, there is also a recognition that they are all ultimately working towards similar goals.

2.3 OPERATIONS

The internal challenges at WINS stem from aiming to meet demand for services through social enterprise revenue, blending a volunteer and paid workforce, and disparate internal processes across sites and facilities.

WINS does not rely heavily on grants and government funding in order to support its social mission, instead it generates the majority (85%) of its revenue through its social enterprise activities in order to fund the organization and the programs and services it provides. These programs and services are in ever increasing demand placing further pressure on the social enterprise. In addition, WINS is targeting being fully self-funding in the near future, which further increases the pressure on the contributions from social enterprise operations.

As a social enterprise, WINS also incorporates paid employees and volunteers in delivering on its mission. This is in part due to the cost-effective nature of volunteer labour but also a key component of WINS' strategy to engage the local community in its mission. Managing and engaging a volunteer workforce has its unique challenges including the need for predictability in scheduling. Since the retail industry is highly cyclical in nature and demand for labour is highly variable the balance between flexibility and predictability is quite complex.

¹⁵ Second-Hand Economy Emerges as a "Side Hustle" Opportunity for Canadians, <http://www.newswire.ca/news-releases/second-hand-economy-emerges-as-a-side-hustle-opportunity-for-canadians-616089113.html>

In many respects, WINS' four thrift stores have been operated independently. This level of independence worked well in the local context as stores were able to react to the local market in a highly responsive manner. With the introduction of its warehouse in 2014 in response to the demand for a larger selection of higher quality, in-season goods, there is a need to better coordinate the full value chain to avoid the erosion of the local customer experience. Investments needed to scale operations like trucks, warehousing, information technology, and skilled labour in key positions in warehousing, retail and marketing need to be prioritized, coordinated and respond to the needs of donors and customers.

3. THE WAY FORWARD

WINS identified and created opportunities for growth by creating a strategic plan that balances aspirations for growth with stewardship and sustainability. The organization has aligned its internal structure to position it for growth and to maximize impact on the communities it serves.

3.1 STRATEGIC PLAN

WINS' strategic plan is built upon the following guiding principles¹⁶:

- 1) Women are assisted to develop the skills, knowledge and resources needed for increased self-reliance.
- 2) WINS is self-reliant.
- 3) WINS brand increases donor, funder and shopper support.

¹⁶ Interview with Laura Dickson, Executive Director, WINS and WINS Strategic Plan Overview, 2015

- 4) Employees are committed to WINS' goals and values, motivated to contribute towards shared success, and are treated fairly and with respect.

There is a direct connection between offering goods for sale at an accessible price and providing those goods for free to those who need more assistance. According to Dickson, WINS' key strength as a social enterprise lies in the alignment of its mission with its retail store operations¹⁷:

When you think of some other social enterprise ideas that float around out there, for example, a hospital that runs a car wash or something like that the two are disconnected, right? I think that, for us, it makes it really easy to tell our story to our supporters and our beneficiaries. We run a thrift store and we also give out the product that we have here to people that are able to demonstrate need¹⁸.

Laura Dickson considers it imperative that WINS do its part towards achieving self-sufficiency due to the volatility of Alberta's resource-based economy and the impact of its related economic fluctuations on donors and funders. Her strategic directive is aimed at WINS becoming 100% self-sustainable over the next five years from its current level of between 80 and 85%.¹⁹

In this regard, the retail strategy of the thrift stores is the perfect entrepreneurial complement to a Free Goods Referral Program for the social mission²⁰. Unlike its for-profit competitors, the social enterprise model does create a financial pressure on the organization but at the same time, it also increases flexibility, opportunity and financial independence over non-profits without business operations.

¹⁷ Women in Need Society "2015 Annual report of the Women in Need Society" 2015

¹⁸ Interview with Laura Dickson, Executive Director, WINS

¹⁹ Interview with Laura Dickson, Executive Director, WINS, and "Strategic Plan Overview", 2015

²⁰ Women in Need Society "2015 Annual report of the Women in Need Society" 2015

To achieve WINS' strategic imperative, the organization must grow support by improving community awareness while continuing to make the incremental improvements necessary to its operations that keep donors and customers coming back. By leveraging its communication platforms, WINS informs clients and customers about special events and that WINS is “local and a social choice” that directly benefits local communities. This is a key competitive advantage for WINS considering a number of its competitors have a national or international presence.

An organization's Theory of Change is an essential component to building understanding and meaning regarding what an organization aims to do, how it intends to do it, the expected impact, and its long-term goals and objectives.

Increasingly, funders, stakeholders and potential collaborators are requiring evidence that applicants and potential partners can clearly articulate their understanding of the overarching problem the organization is attempting to solve, the factors contributing to the problem and interventions that will mitigate the problem.

To that end, WINS has developed a Theory of Change Statement that encapsulates what they do, how they do it, and to what end:

“If women are supported to meet their basic needs, have access to information, develop coping skills, build a positive self-concept, and social networks, they will have the knowledge, self-efficacy, social support, and self-esteem to take advantage of opportunities such as employment and education programs that will enable them to become more self-reliant²¹.”

²¹ WINS, Theory of Change, 2016.

3.2 ALIGNING THE ORGANIZATIONAL STRUCTURE

WINS began with a decentralized structure that provided significant flexibility for independent management of the individual thrift store and contributed to a self-directed and independent culture. While this worked well for many years, as the operation expanded and the interdependencies among the various locations increased (e.g., shared customers, inventory, and costs), this led to inconsistencies in merchandise selection, quality and pricing. To begin to address these inconsistencies and better position the organization for growth, a decision was taken to amend the organizational structure (Figure 2) and centralize certain key decision making processes in areas in which practices were shared across the thrift store network. While the notion of centralization was key to improving efficiencies, and ensuring consistency across the network, management also realized the imperative that each store retain the flexibility necessary to cater to its loyal clientele. As a result, each store aims to adapt to the local needs of its community and neighborhood while ensuring it remains responsive to customer and donor needs and trends.

WINS operates three functional units: organizational support, community programs and social enterprise. Its organizational structure consists of a voluntary board of directors, an executive director, five functional managers, four store managers, a community programs manager along with support and retail and logistics staff. Staff positions include: beneficiary services agents, store customer service agents, warehouse agents, dispatchers and truck drivers (Table 3 on next page).

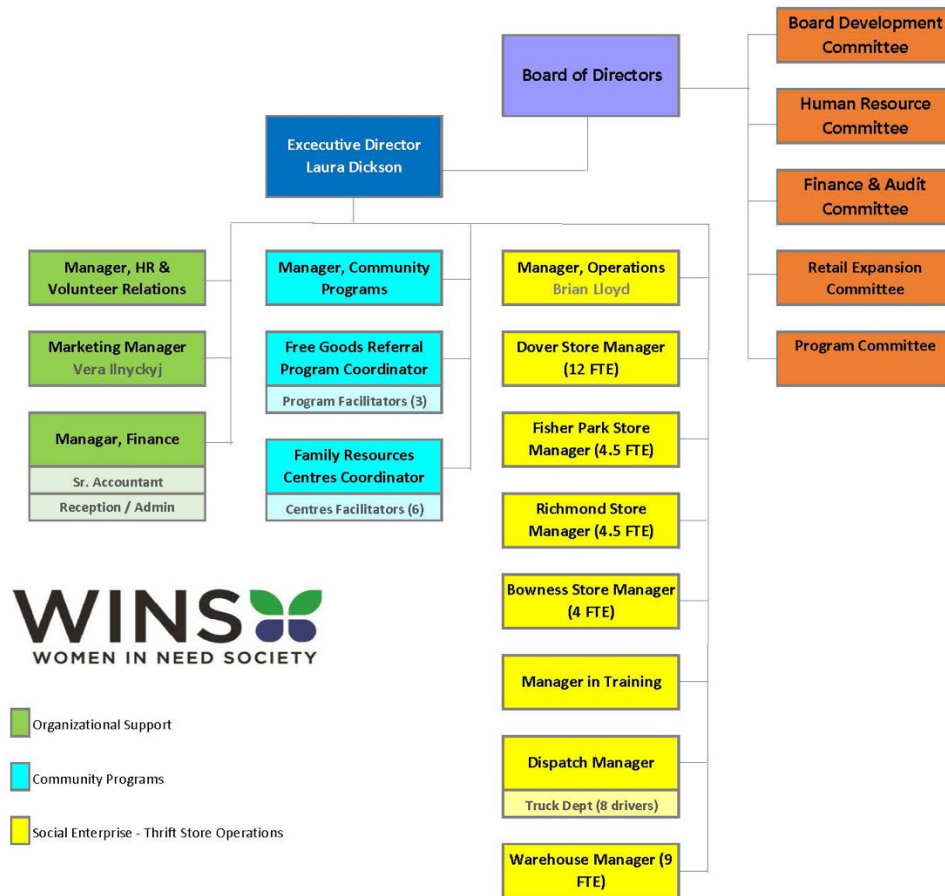


Figure 2. WINS organizational chart

The overall strategy leverages business principles aimed at growing self-sufficiency to increase services to beneficiaries. WINS workforce re-design improves the alignment of mission with external brand.

Table 3. Staffing by Functional Unit

Functional Units	Internal Stakeholders
Organizational Support	Executive Director (1) HR and Volunteer Relations Manager (1) Marketing Manager (1)

	Finance Manager (1) Senior Accountant (1), Administrative support (1)
Community Programs	Community Programs Manager (1) Free Goods Referral Program Coordinator (1), three Facilitators (5) Family Resources Centres Coordinator (1), six Facilitators (6)
Thrift Store Social Enterprise	Operations Manager (1) Store Managers (4), twenty-six staff (26) Warehouse Manager (1), nine staff (9) Dispatch Manager (1), eight drivers/supports (8)

The WINS Board of Directors represent a diverse and talented pool of leaders from across the City of Calgary. Recruited with specific skills, needs and goals in mind, in addition to providing strategic direction, directors are sometimes called upon to share their expertise with the Executive Director and her team from time to time. Whether in the field of finance, human resource management, law, marketing, or information technology, members of the board provide insight and guidance to WINS which has been critical to its success to date.

Key Insight: Without a coherent strategy it is difficult for management and employees to know what should be part of the organizational activities and what should not. This in turn guides how things should be structured and the roles that will be needed to implement the strategy in practice. Such alignment is not automatic and needs to be worked on and tweaked over time.

3.3 OPERATIONAL EXCELLENCE OF THE THRIFT STORES

To mitigate market risk as well as build operational efficiency, WINS follows two courses of action: diversification of revenue and streamlining of operations. WINS actively diversifies revenue streams by diverting poor

quality clothing (clothing of such poor quality that it could not be sold) from landfill and reselling these items to a recycling company. WINS also recycles bric-a-brac (metal), rubber (purses, shoes, backpacks), electronics, cardboard and some books. Expansion of this recycling program has the potential to further advance the organization's goal of self-sustainability. In addition, the clothing-recycling program is promoted to the community to increase awareness of WINS' commitment to environmental sustainability.

A major challenge facing WINS is the streamlining of organizational processes since until recently, each location had operated independently in terms of pricing and operational procedures. The current goal is to centralize to the extent possible, organizational processes under one organization wide system aimed at reducing duplication and improving the customer and donor experience.

To help inform and implement this integrated approach, WINS hired Brian Lloyd in 2016 as the Manager of Operations. Lloyd brings over 25 years of private sector experience and his role at WINS includes oversight of the four thrift stores, the distribution centre, dispatch, and WINS' fleet of four delivery trucks.

WINS' funding objective is to operate self-sufficiently through revenue generated via its retail operations by 2020. In the spring of 2014, the organization secured a 13,000-square foot warehouse to store inventory and operate a fleet of four, one-ton trucks (Figure 3). Through these assets, WINS has leverage to scale its growth within the city without using its retail locations to store excess and off-season inventory.



Figure 3. WINS Fleet with Signage Wrap

Lloyd’s primary role is to improve WINS’ self-sufficiency through improved business efficiency and increased sales revenue. At least once per week he and a representative of the Free Goods Referral Program (FGRP) walk the store floor and assess merchandise turnovers in addition to product pricing.

The WINS organizational culture is represented by two unique perspectives that must be balanced to ensure the organization’s success. The first perspective is held by those individuals who have engaged with WINS as a result of its social mission and its efforts to build community by empowering individuals who have been marginalized. The second perspective is held by those individuals who have been touched by WINS’ entrepreneurial mindset and its drive towards the sustainability that will enable future growth and

expansion. Both perspectives are critical to the organization's long term success, however, they must be balanced.

The role of the store manager is fundamental to WINS' ongoing success. The stores and social enterprise operations together represent 73% of the workforce, with each manager employing between 5 -12 people and overseeing up to a dozen regular volunteers, depending on the location. The store managers work together to create a team that supports the social mission through their monthly meetings that allow them to build both open communication and the trust required to plan and execute business operations. These meetings serve to improve communication, share experience and offer support to the managers. In addition, opportunities to bring together department managers from retail, warehouse and dispatch along with members of the senior management team have increased interaction and improved trust thereby ensuring constant support for the strategic direction.

Through cross-training, managers and staff improve their proficiency levels outside their current roles to help leverage the organization's talent within its current workforce. This helps support retail staff to deliver top quality customer experiences in order to build strong, loyal relationships with shoppers, while staff in warehouse and logistics continue to focus on eliminating waste and increasing efficiency. The store managers also ensure that products, strategic placement, and the redesign of the stores improve sales quotas and monthly sales targets. To achieve monthly sales targets, managers recommend that basket-fill and customer transaction counts are reviewed, stores are always clean and organized, and that staff work as a team to ensure customers and donors feel appreciated. To show support to the staff, managers award staff with WINS Bucks (used to purchase products at WINS) when monthly targets are achieved.

Key Insight: Most organizations struggle with balancing the level of structure needed to get things done efficiently while providing sufficient flexibility to promote innovation. For organizations that rely on volunteers, imposing only those structured processes that are necessary provides

sufficient guidance so individuals know what they should be doing, without necessarily dictating how to do it. This keeps them engaged and productive, while ensuring the overall strategy is being delivered.

WINS' workforce approximates 80 people (about 50 full time and 30 part time) engaged in meeting the needs of their clients and responding to growing demand. While WINS does not require store staff to possess formal experience in retail, upon hire training includes a focus on customer service, building business acumen at the front-line and for front-line managers, and the ability to create and manage a staffing plan that matches resources to demand.

To effectively execute on its new strategy, WINS is working to ensure consistent processes are in place to create a full employee experience that includes an appropriate recruitment strategy, defined job descriptions, onboarding, retention, and continual professional development. The hope is that the consistent processes will improve employee commitment and translate into an enriched donor, client, and customer experience.

3.4 LEVERAGING LOCATION AND LOGISTICS

Retail store locations aim to be strategically situated in residential communities according to walkability and neighborhood characteristics (e.g., donation and purchasing potential). Improving the processing and inventory management practices at their locations by leveraging the capacity at WINS' distribution centre is the key to increasing productivity and profitability. By working towards organization-wide distribution systems with standardized process, WINS can move items that sell well at specific stores by shifting inventory from one store where an item is not in demand to another store where it is. This will allow WINS to weather seasonal changes in donations and reduce waste within the organization.



Figure 4: WINS Retail and Family Resource Centre Locations

The four WINS Thrift stores aim to be strategically located in or near Calgary’s more established residential communities (Figure 4). WINS thrift stores are typically located within a retail cluster to increase customer convenience by taking advantage of cross-shopping. This is essential to the business since 60% of the respondents became aware of a WINS thrift store by simply seeing the store in their neighbourhood.²³ Word of mouth from family and friends also influenced awareness as reported by 43% of the respondents.¹⁹ This data confirms that locations, customer services, and exposure to first time shoppers via WINS Free Goods partnerships remain major marketing tools for attracting new customers.

A survey of WINS’ customers completed in December 2013, explored the shopping habits of the 465 respondents, noting that 34% of WINS’ customers also shop at Walmart, while 15% of respondents only shop at WINS. The survey

²³ A Retail Strategy for WINS, JCWG, 2014

also indicated that 15% of WINS customers also shopped at Value Village, 12% at Goodwill, and 5% at the Salvation Army. Thus, while many WINS customers are very loyal there is also significant shopping around and drawing upon multiple offerings in the market.

A deep dive into the specific WINS locations and the respective neighborhoods they serve provides additional insight into the role that location plays in this business.

Table 4: Store Size and Annual Sales Per Square Foot

Stores Financial	Dover	Bowness	Richmond	Fisher
Size Square Footage (sq.ft.)	11,540	2,350	2,083	2,539
Annual Sales Per Square Foot (\$/sq.ft.)	\$153	\$293	\$327	\$173

As per Table 4, the Dover location is the largest store with 11,540 square feet. This location, which also houses adjacent warehouse space and WINS head offices, has the lowest revenue per square foot. This is the only WINS store where furniture is sold. The Bowness location is an attractive store with good branding and strong merchandising. It is the second smallest of the locations with 2,350 square feet. The Richmond-Killarney Store is the smallest outlet with 2,083 square feet. This location has the highest revenue per square foot. Client demographics indicate the typical consumer at this location includes predominantly senior and student customers. The Fisher Park Store is the second largest store with 2,539 square feet. This location has the second lowest revenue per square foot. It was recently renovated and has a nice, bright and easy to shop space with cause and value signage (Figure 5). The floor plan strategy includes increased focus on sales per square foot and an expanded section for children.



Figure 5: Renewed Displays and Signage

Based on the 2013 survey, customers from the different locations made similar recommendations for improvements per store which are an increase in quantity and selection of product mix available while maintaining low prices and maintaining or expanding the overall positive shopper experience. Based upon this feedback, the WINS team implemented a number of recommendations. A recent customer survey in 2016 illustrated significant improvements on each of these dimensions, with 72% of customers ranking customer service highly, ranking variety/selection the highest factor they liked about WINS, and identifying the quality of the items as the primary reason they shopped at WINS. Interestingly, the one thing customers identified to improve at WINS

was more of what they are currently doing through even larger stores, more selection and more locations!

Table 5: Customer Demographics per store¹⁹

Characteristics	Dover	Bowness	Richmond	Fisher	Average
Female	84%	92%	85%	91%	88%
Age 25-44	32%	41%	31%	38%	35%
Age 45-64	45%	39%	49%	46%	45%
Family with Children	43%	32%	36%	46%	39%
Average Household Income	\$47,529	\$54,394	\$48,112	\$53,833	\$50,967

Across the locations, we see predominantly female customers, many with children and cost conscious average household incomes (Table 5). These trends were confirmed in the 2016 customer survey, with 60% of shoppers between the ages of 35-64, and 72% having children, and 84% female respondents.

Table 6: Marketing attribute per store¹⁹

Marketing Awareness	Dover	Bowness	Richmond	Fisher	Average
Discovered the store	63%	61%	65%	51%	60%
Family and Friends	43%	40%	40%	48%	43%
Heard on Radio	3%	3%	2%	5%	3%
Other (Partners or Internet)	17%	14%	9%	14%	14%
Is Charity important	67%	54%	72%	73%	67%

Interestingly, the most common way the customers became aware of the store was from their location in the neighbourhood, followed by referrals from family and friends (Table 6). A high percentage of customers value that WINS is a charity and appreciate the store hours (Table 7). Findings from the 2016 customer survey identified that nearly 90% of respondents were aware that WINS help women and families, that it is a non-profit, and this played

prominently in their decision to shop at WINS stores. Interestingly, 64% of respondents did not know that WINS is a local organization serving Calgary.

Table 7: Store Location and Characteristics

	Bowness	Fisher	Richmond	Dover
Store Hours	Mon-Fri: 10AM – 6PM Sat-Sun: 9AM – 5PM	Mon-Fri: 10AM – 6PM Sat-Sun: 9AM – 5PM	Mon-Fri: 10AM – 6PM Sat-Sun: 9AM – 5PM	Mon-Fri: 10AM – 6PM Sat-Sun: 9AM – 5PM
Location	6432 Bowness Rd NW Calgary, AB T2B 0E7	134 71 Ave SE Calgary, AB T2H 0R9	2907 Richmond Rd SW Calgary, AB T3E 4N3	3525 – 26 Ave. SE Calgary, AB T2B 2M9

3.5 INVESTING IN RELATIONSHIPS

There is a diverse set of stakeholders that WINS must engage with regularly, including donors, clients, volunteers, and employees. As part of WINS strategic re-organization, a decision was taken to transform the traditional role of “Fund Developer” to that of “Marketing Manager” by hiring Vera Ilnyckyj, who brings more than 20 years of private sector marketing experience to compliment her passion for helping women and their families achieve brighter and more sustainable futures. While still contributing to the development and stewardship of corporate Calgary’s support for WINS mission, Vera’s primary focus is on growing tripartite community engagement including donor relations, community awareness and social services.

As Vera observes, “donors are the lifeblood of WINS” and she believes it is important to maintain relationships with donors by “giving them a good

experience”, which encourages them to continue to donate, inspiring others to follow. Unlike traditional retail, “I can’t just push [product]. I also have to tell the story of how we’re doing great things”.

Community partners also support WINS with over 80 partners, including Calgary Housing Company, the Calgary and Area United Way and other funders and financial supporters.²⁴ WINS is grateful to its corporate supporters and volunteering has grown by 25% in 2016. Donations drives are also a popular way for groups to give back. The economic reality in 2016 has affected the extent of funds available for community investment from corporate Calgary, a long-time financial donor and supporter of WINS.²⁵

To help donors and funders to understand the ways WINS puts their contributions to work, Vera’s mandate also includes increasing awareness of the social services available at WINS to the community. In balancing the messaging between the social and the business aspect, WINS’s key competitive advantage is social responsibility: a store where “Local, Social, and Green” converge.

As Vera noted,

“WINS has an opportunity to tap into the goals and values of millennials and younger generations who are socially engaged in movements such as anti-fast fashion, reusing and green.”

The purchase of second hand items, or up cycling, is promoted as an ethical decision to reduce landfill waste and the demand on resources for new products. In-store value messaging targets shoppers looking to save money. WINS cause messaging also stresses that the money spent in store directly provides funds for helping women and families in need.

²⁴ WINS Strategic Plan Overview, 2015

²⁵ Interview with Laura Dickson, WINS Executive Director, 2016

WINS has expanded its efforts to connect with potential clients and customers by participating in community fairs and street festivals. These inexpensive promotional methods provide opportunities for WINS to reach its target audience and generate word-of-mouth awareness.

Its social media strategy is used to promote sales or events such as sidewalk sales and bridal pop-ups aimed at attracting younger clientele. The effectiveness of this strategy was demonstrated in May 2016, when Facebook advertising for their bridal pop-up shop led to huge lineups at the store before it even opened. As the organization enters its 25 year celebrations, social media will provide opportunities to build capacity and foster relationships cost effectively.

Key Insight: Customers and competitors are increasingly more sophisticated so getting the message out there is incredibly important given the cyclical nature of merchandise supply and demand within this industry. By leveraging social media and other forms of low cost communication, these tactics allow for direct community based engagement through marketing activities that are highly cost effective in light of limited budgets.

During the peak donations season March – October, WINS welcomes numerous one-time volunteer groups to its donations centre to assist warehouse staff in processing donations. As a result, it is sometimes vulnerable to quality control issues such as inconsistencies and variability in the quality of merchandise selected for sale. Volunteers sort through merchandise that has been donated, hang clothes on racks and place saleable items on shelves. Ensuring consistency in volunteer training and commitment will improve customer experience amongst locations.

WINS has 40 regular volunteers, the majority of whom volunteer their time in WINS four thrift stores. A further 1,700 individuals who are one-time volunteers from corporate and community groups help with sorting at the Donations Centre during peak season. In 2016, WINS refreshed its volunteer

recruitment and retention strategy with the aim of attracting volunteers who seek personal fulfillment and are willing to make a minimum monthly commitment to WINS. To do this WINS leverages its participation in community fairs and festivals as opportunities to recruit and engage volunteers.³¹

Dickson recognized early in her tenure that the WINS culture and its success to date was largely due to the passion and commitment of the team. She also recognized the importance of paying attention to changes within the competitive landscape and ease with which competitors were entering the market and/or becoming much more active in the market. Competition, whether from for-profit organization such as Value Village and other low-cost substitutes like Walmart or nonprofit organizations such as Goodwill Industries, calls for a clear value proposition in order to differentiate oneself. Times were changing and Dickson knew that WINS also needed to change. As a result, it became imperative that each thrift store, along with its staff and volunteers, understood the importance of the customer experience. She knew that each component of the experience could be leveraged to be meaningful whether the interaction was at the client, donor, or a fellow team member.

Key Insight: A shared understanding of what makes the organization stand-out from the competition is very important. The role that story plays and continues to play in building awareness of the organization's accomplishments helps staff and volunteers across all departments and levels to better serve customers and donors thereby increasing the likelihood that there will be a growth in support for a dynamic and innovative enterprise.

3.6 MEASURING SUCCESS

Through the introduction of process efficiencies and increased self-generation of operating funds, WINS is working toward financial

sustainability.²⁶ This moves the organization away from cost based pricing, where the selling price of an item is based upon the costs of operating plus a percentage markup that was inconsistently applied across locations. Instead, WINS aims to offer customers value-based pricing, which is based more upon the perceived value of the item to the customer. This latter approach provides for better alignment between customer satisfaction levels and the various financial metrics that better margins will drive, including the amount of money that can be directed towards the social mission.

WINS regularly monitors customer feedback and compares results to internal and industry benchmarks to ensure that its social mission and the enterprise principles are aligned.

Table 8. WINS financial review

Financial Ratios (Fiscal year ending December)	2015	2014	2013
Administrative costs as % of revenues	4.70%	6.50%	4.40%
Fundraising costs as % of donations	9.80%	7.40%	11.60%
Program cost coverage (%)	33.90%	35.50%	42.30%
Summary Financial Statements (All figures in \$)	2015	2014	2013
Donations	874,502	718,951	490,703
Good in kind	155,635	183,917	78,239
Fees for service	156,981	153,317	0
Business activities (net)	3,104,368	3,022,600	2,868,498
Investment income	14,763	16,980	16,759
Other Income	1,283	800	17,183
Total revenues	4,307,532	4,096,565	3,471,382
Program costs	3,887,238	3,654,897	3,045,641
Administrative costs	201,530	264,214	152,021
Fundraising costs	85,589	53,038	56,899
Other costs	31,371	32,218	29,843
Cash flow from operations	101,804	92,198	186,978
Funding reserves	1,318,366	1,298,083	1,287,595

Source: Charity Intelligence Canada <https://www.charityintelligence.ca/charity-details/445-women-in-need-society-of-calgary>

²⁶ WINS website <http://www.womeninneed.net/about/environmental-impact/> "Environmental Impact." 2016.

Charity Intelligence Canada rates WINS well in that a small percentage of revenue (i.e., under 5%) is directed towards administrative costs and it maintains high levels of transparency in reporting. As per Table 8, a number of positive trends are apparent from this data such as maintenance of administrative costs, expansion of revenues, and increased funding reserves.

One of the benefits that WINS promotes to its donors and shoppers is the diversion of goods from landfill. WINS is actively striving to leverage its environmental mandate, “to repurpose, upcycle and recycle gently used items into social good” through its donation drop-off and clothing recycling program. The organization commits to its donors that it will divert donated goods that are unfit for sale to a recycling program whenever possible. Currently, WINS generates a small portion of its revenues from its recycling activities but further recycling initiatives are under investigation, and WINS recognizes that this is a niche market requiring internal capacity and dependable external supply chain connections in order to be successful³³.

Key Insight: A story of sustainability necessitates getting a lot of things right: the social, the financial, and the environmental. However, like a hero’s journey, the path to success is not always obvious, resulting in the occasional misstep. To build a successful narrative requires learning from mistakes that result in positive changes. Therefore, achieving alignment between services offered and the social mission is an ongoing experiment that requires self-reflection, course correction, and patience.

The social impact of supporting WINS clientele is difficult to measure due to the basic needs type nature of the majority of the services provided, the highly mobile nature of its client base, and the time lag between when the support is provided and longer-term benefit realized. Within its thrift retail operations, efficiencies aimed at supporting self-sustainability are slightly easier to measure, and Key Performance Indicators (KPIs) were introduced to monitor progress (Figure 6). Coming from the private sector, where many of these systems are standard procedure, Lloyd experienced a learning curve when developing the processes and systems for data collection from scratch. These systems continue to be essential for WINS growth. Moreover, ongoing

monitoring of the KPIs provides the background data needed to assess readiness for growth.

Monitoring metrics in both thrift retail operations as well as program and service delivery helps the management team assess the organization’s ability to meet the needs of its clients along with the level of service provided. The KPIs are organized according mission/impact, self-sufficiency and brand awareness (Table 9).

Table 9. Key Performance Indicators organized according to the three strategies.

Mission/Impact	Self- Sufficiency	Brand Awareness
Client Goal Management (CGMs)	Self-Sufficiency	Customers
Basic Needs (Free Goods)	Store Sales	Donors
	Replenishment Rate	
	Donations Sorted	
	Days of Donations to Sort	

(Adapted from WINS, “2016 Dashboard” 2016)

The mission/impact is evaluated by comparing target and actual client goal management metrics and through free goods referrals redeemed (Figure 6 Mission Impact Dashboard: Charts “New CGM’s” and “Free Goods Referrals Redeemed”).

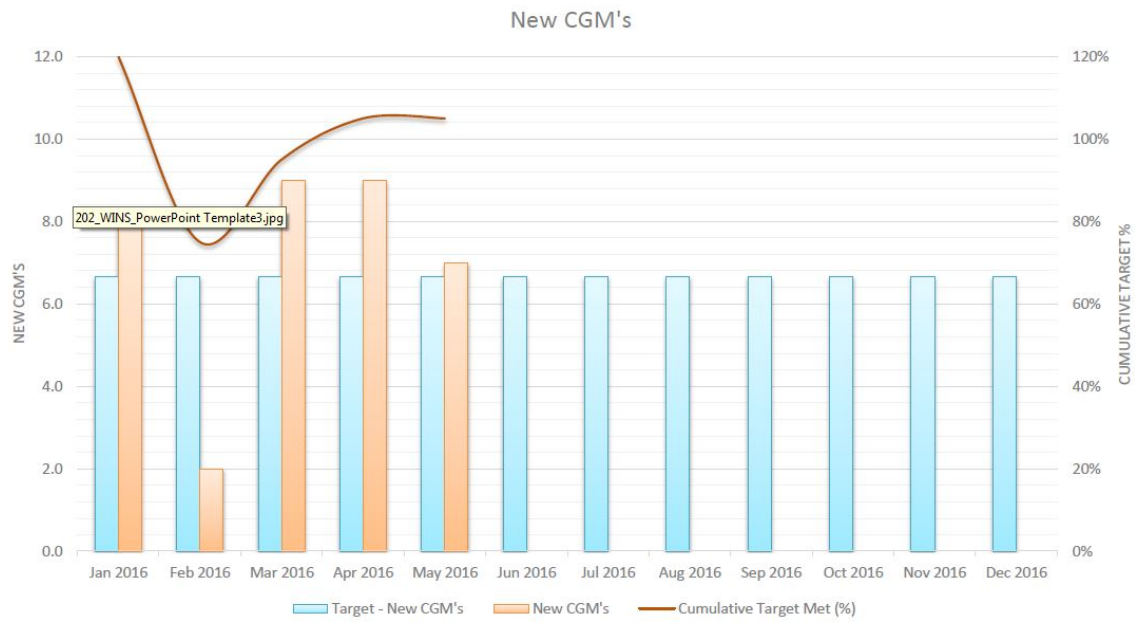
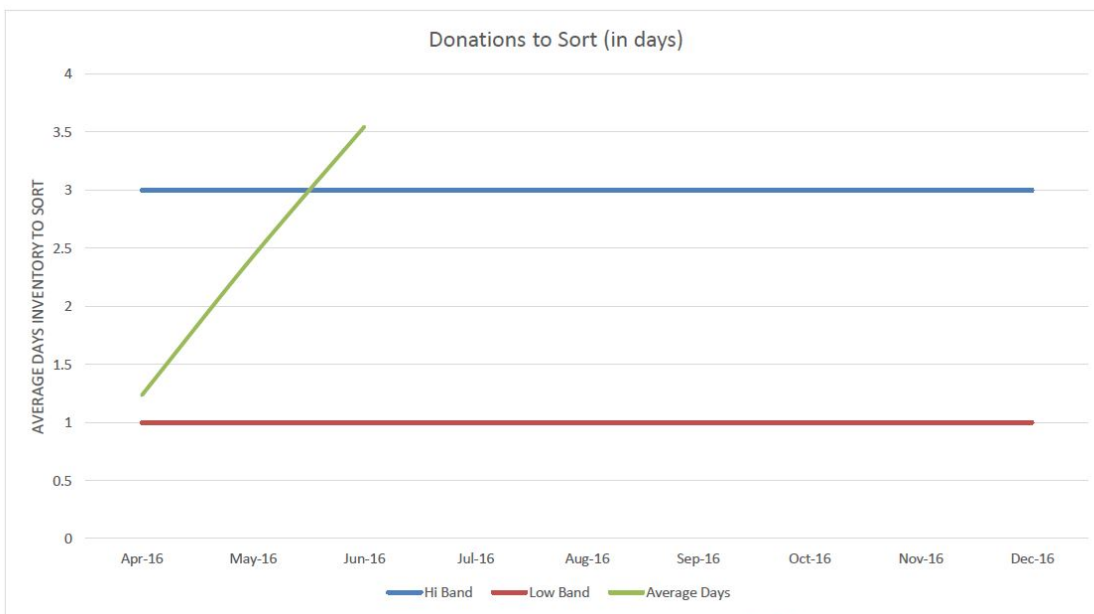
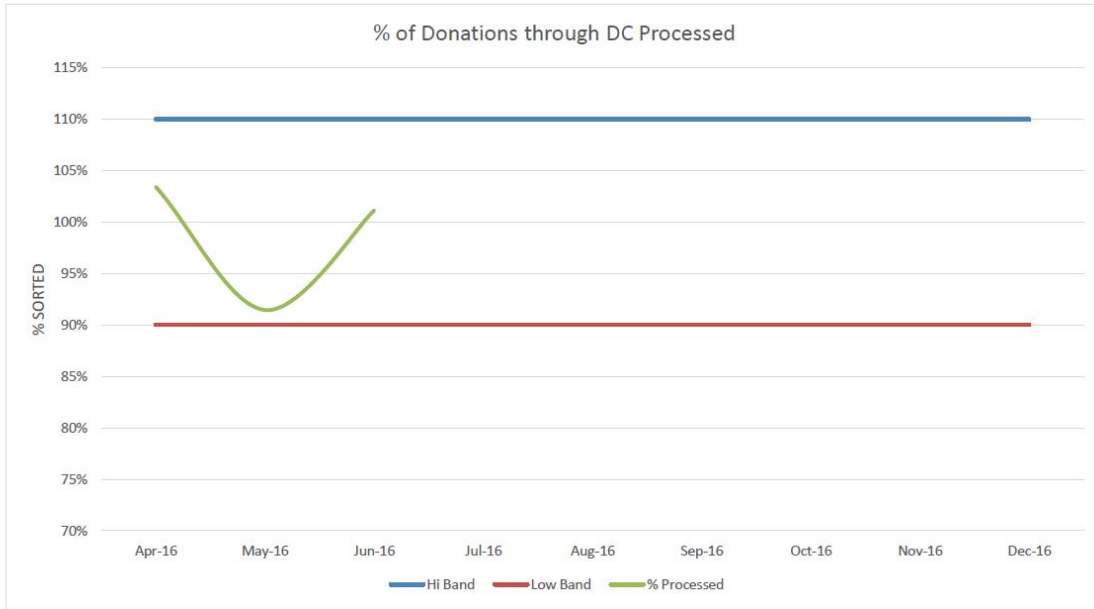


Figure 6. Mission-Impact Dashboard

The self-sufficiency of the organization is based upon tracking the revenue/expenditures, store sales, the rates of items sold replenished by the

distribution centre, and the efficiency of the sorting process (Figure 7: Charts “Operational Sustainability”, “Store Sales to Target”, % of Donations through DC Processed”, Donations to Sort (in days), “Replenishment Rate (% by week)”).





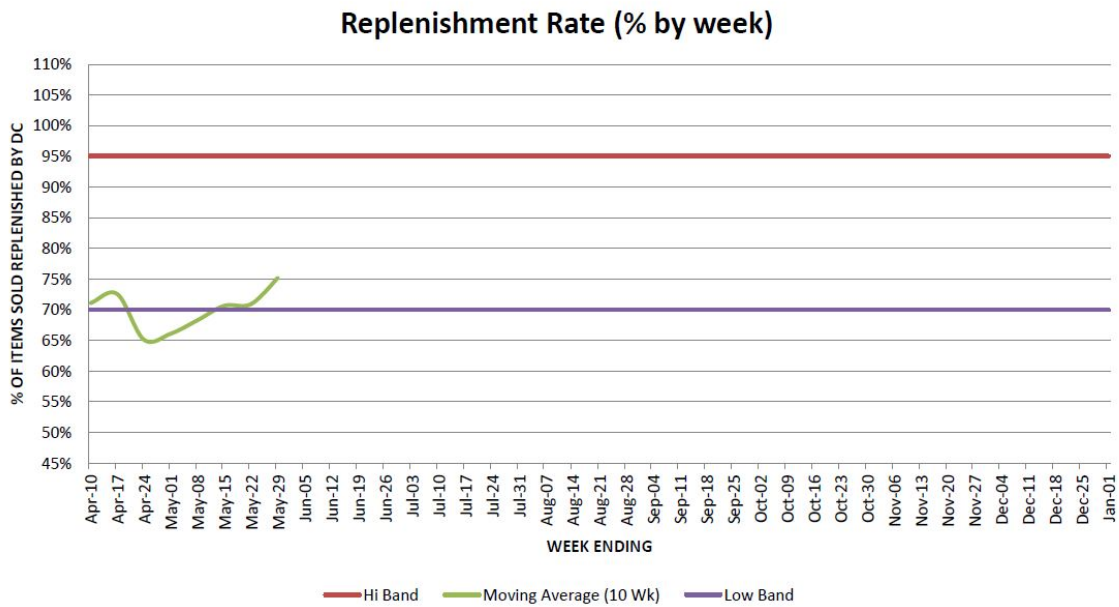
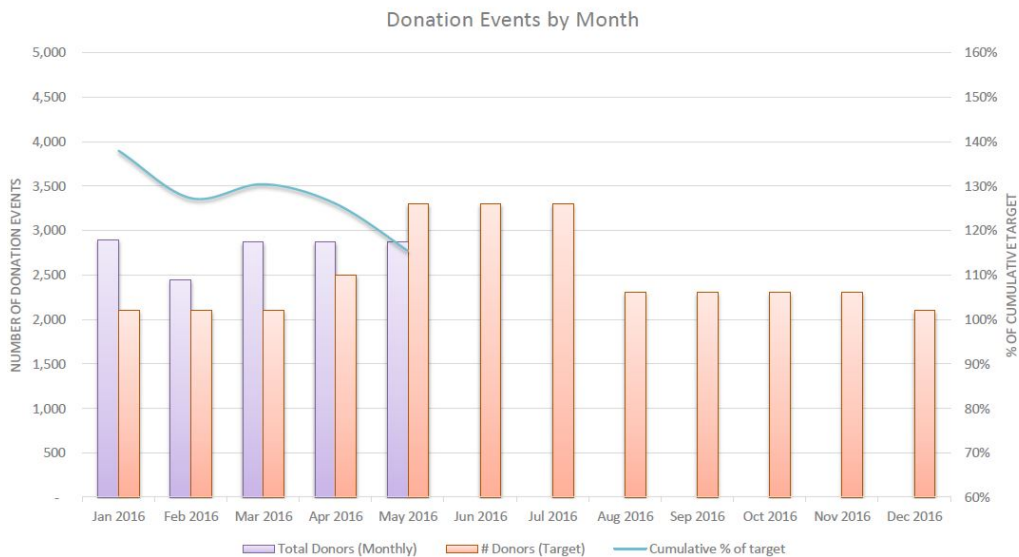


Figure 7. Self-Sufficiency Dashboard

The brand awareness of the organization is evaluated based upon the number of customer and donor transactions per month broken down as targets and actuals (Figure 8 Brand Awareness Dashboard: Charts “Donation Events by Month” and “Customer Transactions by Month”).



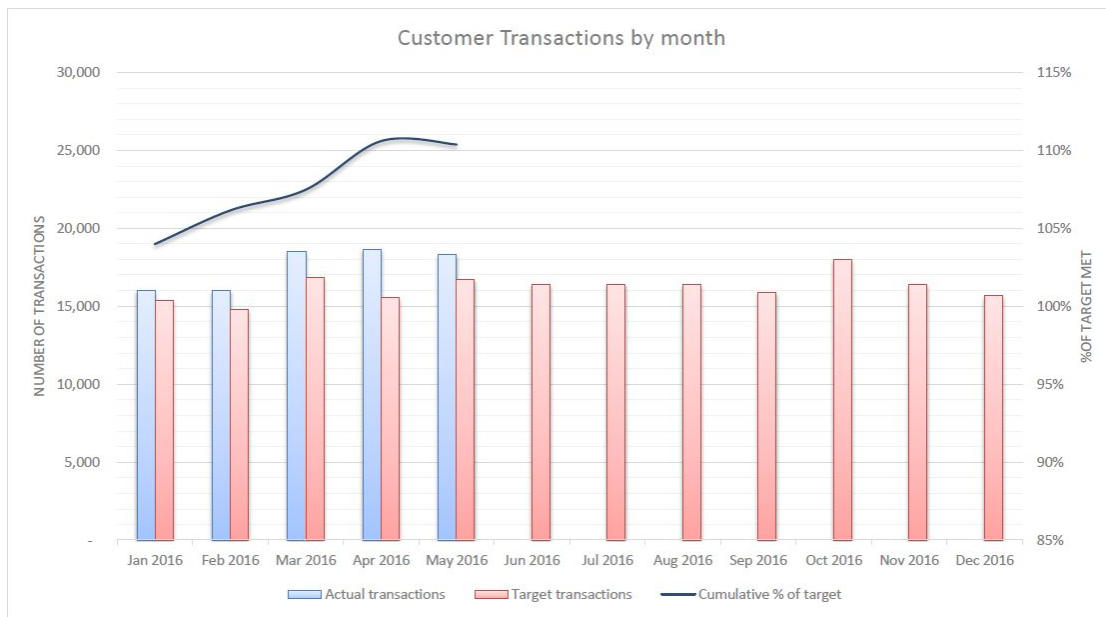


Figure 8. Brand Awareness Dashboard

Key Insight. A fundamental motivation of a social enterprise is to make a positive impact on the lives of individuals and communities related to their cause. To this end there is a need to not only successfully implement a program or strategy, but to also monitor and improve the impacts of those programs and strategies by collecting key metrics over time: Evidence-based decisions can lead to improved business practices, optimize gains, and ensure high quality program delivery.

4. CONCLUSION

Organizations are formed to accomplish more as a group than they could individually. Entrepreneurs identify gaps and then set about to leverage those opportunities often through the creation of new enterprises. For the social entrepreneur, these opportunities represent the chance to create benefit for individuals, or society as a whole, while simultaneously demonstrating their business acumen in creating an organization, or expanding an existing one. For those who are able to balance what can be competing mandates, the payoff for

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the beneficiary, the entrepreneur and their supporters, is immense. The virtuous cycle begins with relationship building, is reinforced by the delivery of a quality product or service and results in progress for beneficiaries along with profits for re-investment in business operations.



ABOUT THE AUTHORS

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Catherine is Mount Royal's first tenure track professor in Social Innovation. Prior to joining academia, Catherine spent almost twenty years in the private sector; in corporate planning, finance and marketing. She has also spent considerable time consulting to the nonprofit sector. Her experience is wide and deep in that she was the President and CEO of a Calgary-based registered charity that operated a social enterprise. Catherine is passionate about teaching, curriculum design and experiential learning. Over the past two years she has been involved in course design, piloting many of MRU's new courses in Social Innovation.

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Rodney Steadman, MA– Researcher, Applied Research & Evaluation. Rodney Steadman holds an MA in Anthropology from the University of Alberta, a BA from the University of Victoria, and a BPE from the University of Calgary. He has a diverse research background with experience in both qualitative and quantitative research methods, but his heart is in ethnographic research...and mountain biking...and skiing...anything outdoors really. He combined his passion for outdoor activities and research for his master's thesis on the perceptions of health, healing, and wellness in middle aged and older adult hiking and walking

groups. His findings were published in *Anthropology & Aging Quarterly*. After graduation, Rodney worked as a Junior Research Assistant for the University of Calgary's O'Brien Institute for Public Health, where he conducted health technology assessments for Alberta Health Services. Also at the University of Calgary, he worked as a Research Assistant in the Department of Psychology's Addictive Behaviours Laboratory where he was instrumental in data collection, analysis, report writing, volunteer wrangling and anything else that involved maintaining a positive and productive work environment.

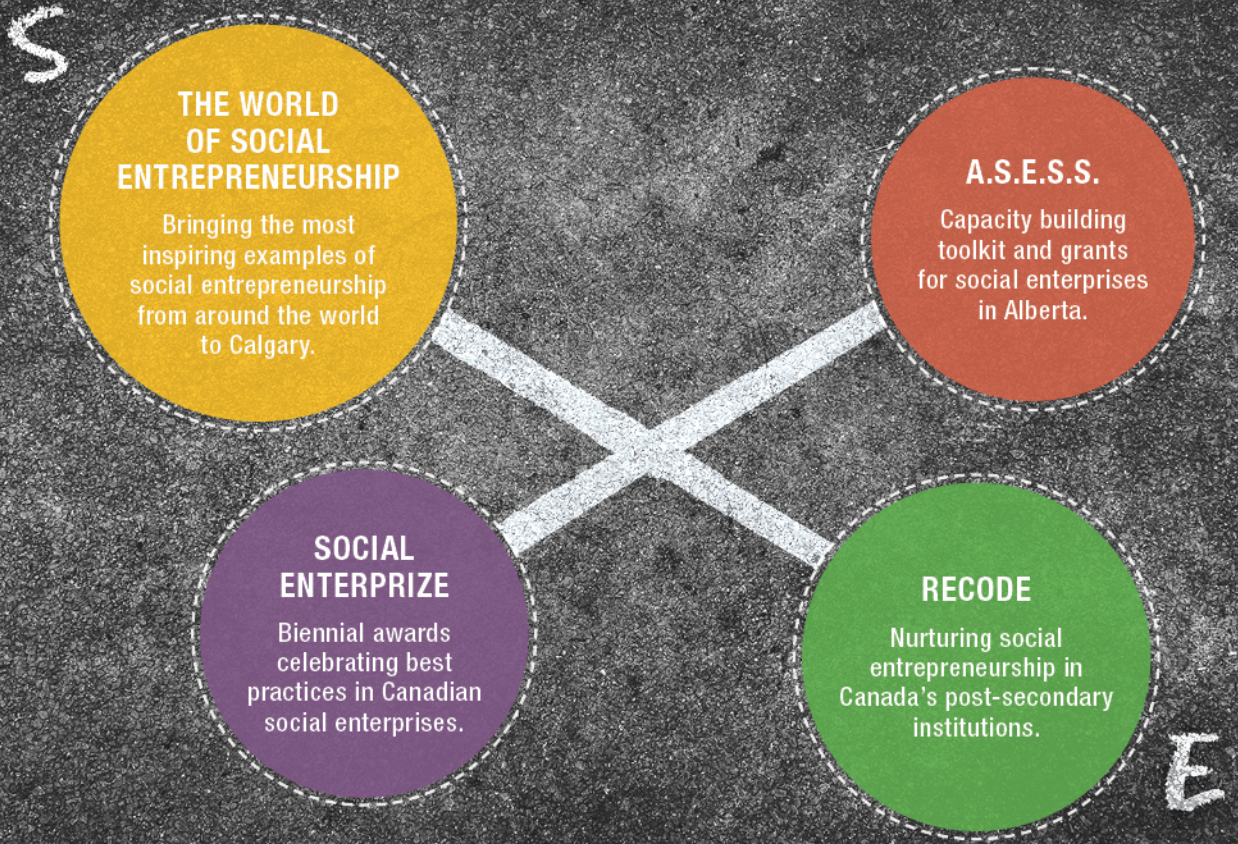
Regula Lewis, BA - Project Officer, Social Entrepreneurship and Innovation, Chiu School of Business. Regula Lewis has extensive expertise in operational responsibilities including project management, program development, event management, and senior business administration. She has worked in multiple industries including post-secondary education, not-for-profit and oil & gas. Regula enjoys yoga and learning to ride horses in the discipline of dressage. She balances her office life with her passion for local and global wildlife conservation and her volunteer work with organizations such as the Calgary Wildlife Rehabilitation Society and Nature Conservancy Canada. In her current position as Project Officer, Regula is responsible for the management of the peer-tutor program, the coordination and implementation of various social entrepreneurship and innovation initiatives, developing and advancing experiential learning and student support opportunities, and supports initiatives in collaboration with Chiu School of Business' donors and partners. Regula has a Federal Diploma in Business Administration from Switzerland and a Certificate in Applied Project Management from Mount Royal University.

Eileen Gaetz, M.A. - With expertise in Communications, Marketing, and Business Development, Eileen Gaetz has worked closely with senior management implementing business objectives and strategies in highly competitive markets for organizations in the private sector. Currently, Eileen is responsible for evaluating, planning and executing key communications and marketing at the Chiu School of Business. She believes that success comes down to one task - helping people and projects succeed. Eileen holds a Master's Degree in Communications from Royal Roads University with a focus on Corporate Social Responsibility and Master's Certificate in Project Management from St. Mary's University.

Kathleen Grindrod-Millar is entering her second year of her MSc in Community Health Sciences at the University of Calgary. Kathleen holds a Bachelor of Arts in Art History and Anthropology, and draws upon this unique perspective in her research, seeking to holistically understand phenomena from a qualitative standpoint. Kathleen aspires to enter the field of academia in the area of health quality improvement. Her research interests include quality improvement, information design, and cross-cultural communication in health care. Kathleen has presented her work at local and national conferences and is funded by the research and innovation initiative Ward of the 21st century (W21C.org). Her current thesis focuses on the design and evaluation of a Non-Alcoholic Fatty Liver Disease educational tool for both patients and family doctors.

Chad Saunders, MBA, PhD, ICD.D is an Assistant Professor at the Haskayne School of Business in the area of Entrepreneurship & Innovation, and holds adjunct appointments with the Departments of Community Health Sciences (CHS) and Medicine at the Faculty of Medicine, where he is the eHealth Services and Strategy Lead with the Ward of the 21st Century (W21C.org). Prior to entering academia Chad worked with a business incubator for rapid growth enterprises. Chad's research and venture startup activities have a strong social entrepreneurship focus. Chad is a founding member of the Canadian Global Entrepreneurship Monitor (GEM) study on entrepreneurship. Chad's work is published in top journals, including Entrepreneurship Theory & Practice, Journal of Business Venturing, and Research Policy.

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