

IMPACT REPORT

REALIZE STRATEGIES

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LAND ACKNOWLEDGEMENT

We are grateful and thankful to have our headquarters on Sk̓wx̓wú7mesh (Squamish), Səlilwətał/Sel̓íl̓wítulh (Tseil-Waututh), and x̣ʷməθḳʷəỵəm (Musqueam) territories. Realize Strategies is committed to the process of decolonization and reconciliation with Indigenous, First Nations, and Metis communities.

A LETTER FROM THE CEO

“We bring value to our members, clients, and partners by reinvesting in, engaging, and collaborating with the communities we serve.”

2021/22 has been a year of growth and new ventures. As the world around us has shifted and adapted to the new needs and norms of the workplace, we have been listening closely to the needs and aspirations of our membership, communities, and partners.

The theme of this year’s Impact Report is “**Circular Economies**”. Through our educational, economic, leadership, and social work, we are investing in a sustainable and equitable purpose-driven economy where organizations actively reinvest in and engage with the communities they serve. As a purpose-driven organization ourselves, we are intrinsically linked to the needs of our community and members. At Realize, we don’t just provide a one-off service and call it a day – we care about your purpose, values, and goals and strive to help boost your own community impact. For example, this past year we achieved a new record of generating over **\$3.26M** for our members through our Community Innovation Cash Pool Program!

In this Impact Report, we are proud to celebrate and highlight the successes of both Realize and our member communities. We hope this report inspires others to reflect on and celebrate their people and communities as well as hold our team accountable to continuing to use business as a force for good and keeping people at the centre of everything we do.

Thank you for being a part of our journey.

— John Kay,
CEO of Realize Strategies



A YEAR IN REVIEW

160

WE HAVE **160 MEMBERS** LOCATED ACROSS BRITISH COLUMBIA.

\$3.26
MILLION

WE GENERATED OVER **\$3.26 MILLION DOLLARS** FOR OUR MEMBER COMMUNITIES

Through our **Community Innovation Cash Pool Program** partnership with Vancity, we generated over **\$3.26 million** for our Realize members to be reinvested in the communities they serve.

6

FOR THE **SIXTH CONSECUTIVE YEAR**, WE HAVE BEEN NAMED **2022 BEST FOR THE WORLD™ B CORP** IN RECOGNITION OF OUR EXCEPTIONAL POSITIVE IMPACT IN TWO CATEGORIES: **GOVERNANCE AND WORKERS**.

31

WE COMPLETED **31 CONSULTING PROJECTS** AND STARTED AN ADDITIONAL **4 PROJECTS** TO BE COMPLETED IN THE NEXT YEAR.

A YEAR IN REVIEW

1

WE LAUNCHED **REALIZEU**, AN EDUCATION PLATFORM. DEVELOPED BY INDUSTRY EXPERTS, WE TRAIN LEADERS ON HOW TO HANDLE CURRENT AND FUTURE WORKPLACE CHALLENGES WITH **CONFIDENCE, RESILIENCE, AND EMPATHY**.

40

THROUGH OUR **EDUCATION GRANT PROGRAM**, WE SPONSORED **40 EMERGING LEADERS**, ELEVATING THEIR **LEADERSHIP AND GOVERNANCE SKILLS** THROUGH **REALIZEU**.

537
HOURS

WE VOLUNTEERED **537 HOURS**

Giving back and being actively involved within our communities is an integral part of our Realize culture. Our team members are proud to regularly volunteer their time and skills at various non-profits and events.

2

WE SPONSORED **2 EVENTS** IN OUR COMMUNITY

We are proud sponsors of the annual **Archway Charity Golf Tournament** and **Co-operatives and Mutuals Canada 2022 Congress**.

REALIZE

EDUCATION: ELEVATING YOUR PEOPLE AND CULTURE

RealizeU: Teaching Your Leaders to Handle Current and Future Workplace Challenges with Confidence, Resilience, and Empathy

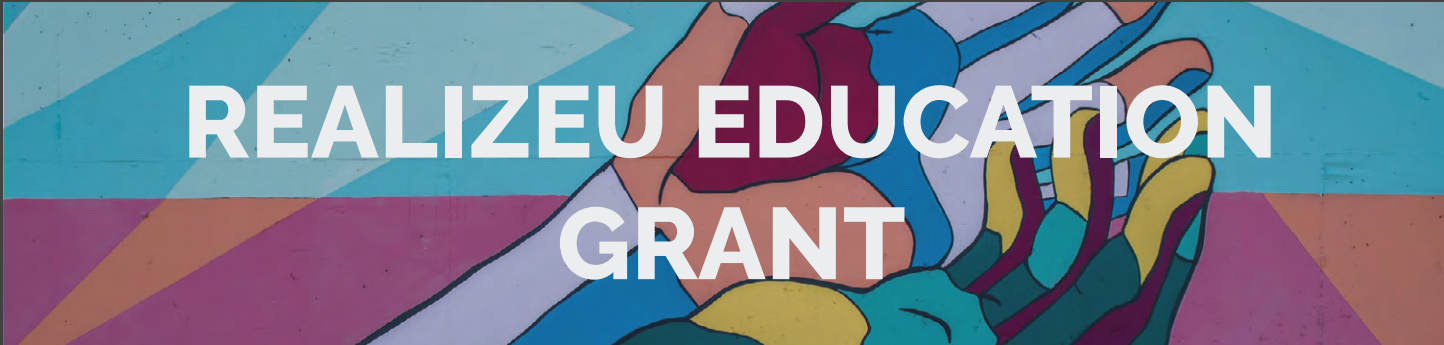
This year, we launched [RealizeU](#), a multidisciplinary education program for emerging and established leaders, designed and instructed by the experts at Realize Strategies.

At RealizeU, we specialize in taking a human-centred approach to help leaders lead their organizations with purpose as well as achieve high performance and resilience. We equip leaders with practical tools and strategies, applied industry insights, and flexible leadership skills to handle current and future workplace challenges with resilience and empathy.

RealizeU was created to answer the unmet needs of leaders within our own membership and across the co-operative, non-profit, and private sectors. Led by our Realize experts, RealizeU helps leaders develop an agile, resilient, and people-centered mindset which is crucial to improving overall staff retention, productivity, and overall performance. Current course topics include:

- How to create and support a motivating employee experience that improves overall employee fulfillment, alignment, retention, and performance.
- How to adapt your organization's leadership to better align with an engaging post-pandemic workplace.

Our intensive live workshops are held quarterly – the next available Spring session will be offered April-May 2023. Stay tuned as we will be launching new RealizeU collections later this year.



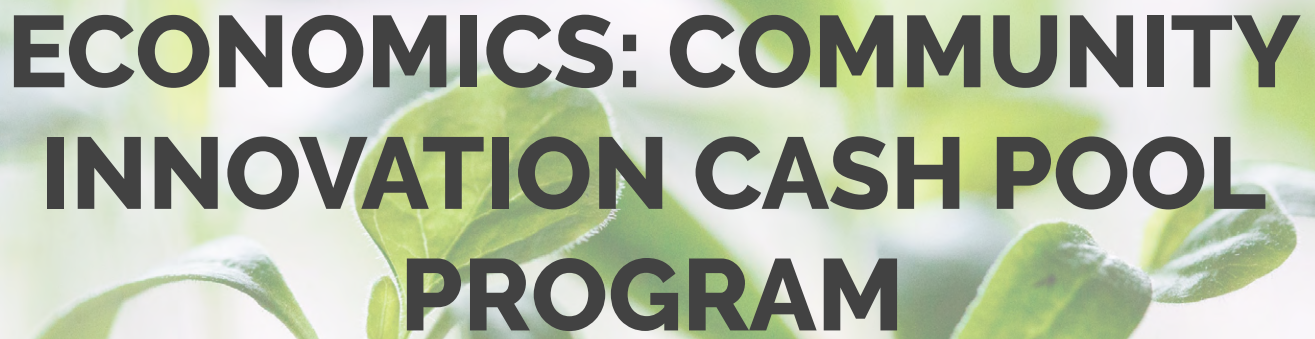
Accessible Leadership Development

Investing in and elevating your leadership should be accessible to all organizations, regardless of size or budget. That's why we created the **RealizeU Education Grant** to support emerging and established leaders within community organizations serving marginalized populations.

In our inaugural year, we sponsored **40 community leaders**, elevating their leadership and governance skills through RealizeU. We look forward to expanding our partnerships in the new year and providing accessible professional development.

If your organization is a non-profit, registered charity, social enterprise, or co-operative serving marginalized populations with an annual revenue of less than \$2 million, our RealizeU Education Grant is here to offer free training to you and your team.

To learn more and apply, please reach out to us at communications@realizestrategies.ca.



ECONOMICS: COMMUNITY INNOVATION CASH POOL PROGRAM

Amplifying the Power and Impact of our Members

Our longstanding Community Innovation Cash Pool Program (CICPP) focusses on amplifying the strengths and impact of our members. Operated in partnership with Vancity Credit Union, our CICPP offers non-profit and co-operative members premium interest rates on their deposits. By pooling member accounts into one large depositor, we are able to offer our Pool members an exclusive premium interest rate of Prime – 1.85%. Over the last fiscal year, our Community Innovation Cash Pool Program generated over \$3.26 million in interest payments for our members to be reinvested in the communities they serve!

“The **Realize Strategies Community Innovation Cash Pool Program** provides PLEA Community Services with a preferable interest rate on all of our bank accounts on a daily basis. The interest we receive supports programs that otherwise would not exist in our community without this partnership.”

— Tim Veresh, CEO
PLEA Community Services

Designed to support non-profits and co-operatives, CICPP members can still have easy access to their independent operational accounts and funds while enjoying the benefits of a higher interest rate of a collective deposit pool. Contact us at info@realizestrategies.ca to learn more and apply.



COMMUNITY: SOCIAL IMPACT INVESTMENT

Using Business to Create Positive Impact

Led by our goal of "using business to create positive impact", our Social Impact Investment initiative has been growing over the past year. We are committed to investing our surplus cash assets in local social enterprises as an alternative to investments in the conventional marketplace.

Social impact investment not only aligns with our mission, values, and purpose – it also helps us live those same values. Investing in social enterprise supports capacity building, job creation, training and retaining capital in the community, and the development of blended value business models.

We are always open to new opportunities – if you would like to suggest a social enterprise for our consideration, [let us know!](#)

LEADERSHIP: B CORP BEST FOR THE WORLD

We are thrilled to be named a **2022 Best for the World™ B Corp** in recognition of our exceptional positive impact in two categories: **Governance** and **Workers!**

For the sixth consecutive year, Realize Strategies has been recognized on the B Corp Best for the World™ honoree list. Best for the World is a distinction granted by B Lab to Certified B Corporations (B Corps) whose verified B Impact Scores in the five impact areas evaluated in the B Impact Assessment — community, customers, environment, governance, and workers — rank in the **top global 5% of all B Corps** in their corresponding size group.

Here at Realize, we take great pride in being part of the B Corp community. We are big believers in the power of business as a force for good and strive to be a living example that balancing purpose and profit is a part of your organization’s success, not a detractor. For 2022, we have made the global list again in the Workers and Governance categories. The Workers category recognizes the top B Corps who prioritize their workforce through employee-focused efforts, such as inclusive hiring practices and employee ownership. The Governance category highlights the top-ranking B Corps who focus on transparency and accountability, and build vision, mission, and values into their company’s bylaws. Check out our B Impact Report and Score to learn more about our work.

Going forward, we will continue our efforts to improve Realize’s Impact Score through the B Impact Assessment as we seek new ways to live out our values and to bring greater accountability and transparency to our operations. Learn more about our B Corp journey [here](#).





Positive, long-lasting change takes time and people committed to rolling up their sleeves and working together. We are so proud of the work that we have accomplished this year as a team of staff and Board of Directors alongside our members and clients through deeply-rooted partnerships and as members of global movements.

A special thanks to our staff:

John Kay
Alison Marshall
Gillian Harper
Makeda Henry
Brad Boyce
Samantha Lee
Megan Lin
Azin Soufi

And to our Board of Directors:

Phil Baudin
Jane Cox
Zameena Dadani
Ben Hyman
Jack Keough
Selena McLachlan
Mark Roseland
Tim Veresh