

rise

Asset Development



annual report

2017-2018

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SUPPORTING BUSINESS GROWTH. INVESTING IN PEOPLE.





## **ABOUT RISE ASSET DEVELOPMENT**

Supporting business growth.  
Investing in people.

Rise works to empower business owners with access to financing and business support. We recognize the interdependency of financial well-being to one's overall quality of life. Rise is committed to improving the lives of people who are unable to secure employment due to mental health or addiction challenges.

We invest in entrepreneurs with mental health or addiction challenges.





## FROM THE CHAIR OF THE BOARD OF DIRECTORS

This year, our focus has been on enabling scaling: growing our operational capacity and building awareness of Rise outside of Ontario. With ongoing support from our Impact Donors at the Government of Ontario, Bell Let's Talk, RBC Foundation and Janis Rotman, the Rise team has established connections and is building partnerships in Atlantic Canada and in Western Canada. Those locations were selected as a result of the excellent pro bono advisory services of Deloitte, using new data from the Mental Health Commission of Canada, which identified priority provinces.

In 2017, Rise launched an innovative new capital model – a loan fund supported by the Business Development Bank of Canada and an anonymous private foundation, which will enable us to extend small business loans across the country over the next five years. In-Kind legal support for this loan fund was provided by Osler.

We are grateful to our Founding Donor, Sandra Rotman, for her ongoing involvement at the board level, and to supporters Citi Foundation, Shoppers Drug Mart Foundation and Michael H. McCain and family, as well as several anonymous donors.

The Board is tremendously optimistic at the prospects for 2018 and beyond, and is committed to providing the strategic leadership required to advance the mission of Rise Asset Development.

Sincerely,

Robert J. McGuire  
Chair of the Board of Directors





## FROM THE CHIEF OPERATING OFFICER

Staying true to our roots in human-centred design thinking, our primary focus this year was on our clients – targeted outreach to build awareness, providing individualized business planning support and celebrating successes. There were many successes this year, from Rise clients being sought out to speak on panels and at conferences, to achieving the huge milestone of \$1 million invested in client businesses, to the impressive roster of award winners in our Paul E. Garfinkel Awards for Entrepreneurial Achievement (profiled later in this report). We held our first Annual Volunteer Recognition event – to thank our mentors and coaches for the hours they dedicate to our clients’ success and we released groundbreaking Social Inclusion research showing the broader social impact of Rise’s services on the clients that we serve.

On the operational side, ongoing pro bono support from Lift Philanthropy Partners helped us to build our capacity to serve more clients in and outside of Ontario. We continue to invest in the team and in technology, balancing the need for direct client interaction with the potential of greater reach and impact through digital means. Through the support of our Program Donor Citi Foundation, we were able to bring the excellent Rotman Business Design based curriculum of our Youth Small Business Program online, launching the EnterpRISEing Youth Hub. The Hub features interactive and gamified online tools, comprehensive online resources and promotes a more equitable entrepreneurship ecosystem and a more diverse Canadian economy.

The Rise team is united in its commitment to reducing the stigma and barriers associated with mental health and addiction challenges by empowering more Canadians to pursue self-employment on their own terms. The future is bright!

Beth Dea,  
Chief Operating Officer





## FROM THE INVESTMENT COMMITTEE CHAIR

Rise relies heavily on the contributions of volunteers as it continues to grow its social and economic impact across Canada. Nowhere is this more evident than on the Investment Committee, which consists of a team of 10 dedicated volunteers who pore over business plans and cash-flow statements to assess the business viability and personal readiness of the applications that come through the door.

This year, the Investment Committee reviewed and updated Rise's Credit Policy to provide more specific guidelines for ensuring that the businesses we support are reflective of Rise's mission to support people living with mental health and addiction challenges.

Each year, we are delighted to hear the stories from the clients we have funded – there is no greater reward than knowing that the work we do at Rise is having tangible results and allowing our fellow Canadians to contribute to their families and their communities.

Moving forward, we will focus our efforts on expanding the capacity and diversity of the Investment Committee, in anticipation of our first applications from outside Ontario. I have full confidence that my colleagues on the Committee are fully dedicated to meeting this growth with ongoing enthusiasm and empathy.

Kathleen Coulson, Chair,  
Investment Committee

A handwritten signature in black ink that reads "K Coulson".



2017–2018

# GARFINKEL AWARDS

## Enterp**RISE**r of the Year

*Awarded to a Rise client from any of our programs who has best exemplified perseverance and has successfully launched or grown a business with support of a low-interest Rise loan.*

## **RISE**-ing Young Entrepreneur of the Year Award

*Awarded to a graduate of Rise's Youth Small Business Program who has also successfully launched a business*

## **Shoppers Love. You.** Female Entrepreneur

*Awarded to a female Rise lending client who has successfully launched or grown a business with support from Rise.*

## The Annual Rise Volunteer Award

*Awarded to a Rise volunteer for their unwavering commitment to supporting Rise and its clients.*





LEFT TO RIGHT: JUSTIN CARTER, JENNIFER BECKFORD, DJESSIKA EMUNGANYA, SARAH LINDSAY, JAMES STUART

## PAUL E. GARFINKEL AWARDS



LEFT TO RIGHT: JODI BUTTS (FORMER RISE CEO), DR. PAUL GARFINKEL, SANDRA ROTMAN, THE HONOURABLE MICHAEL WILSON

Rise held the 6<sup>th</sup> annual Dr. Paul E. Garfinkel Awards for Entrepreneurial Achievement ceremony in May 2018. The awards are named in honour of Dr. Paul Garfinkel, founder and first CEO of the Centre for Addiction and Mental Health (CAMH) and an ongoing leader in the campaign to fight the stigma associated with mental illness and addiction.

Sponsored by Bell Let's Talk and the Business Development Bank of Canada (BDC), this year's awards recognized the following winners and honourable mentions:



RISE STAFF



# w i n n e r s

## ENTERPRISE RISE OF THE YEAR AWARD



© @IMAJENSTAGING

f /IMAJENDESIGNANDDECOR

WWW.IMAJENED.COM

### Jennifer Beckford

The owner of Imajen Design and Décor, Jennifer Beckford has been operating in the Greater Toronto Area (GTA) for over five years. Imajen Design and Décor is a home staging business specializing in décor, design, consulting, painting, furniture and accessory rental, cleaning, and decluttering. Jennifer has made partnerships with realtors all across the GTA.

Jennifer has an extensive educational background to support her business. She studied Interior Decorating at the International Academy of Design and Interior Decorating at Humber College, and also graduated from the Ontario Self-Employment Benefit (OSEB) program in 2015. Additionally, Jennifer apprenticed with BNC Designs Staging Company, and has previous work experience colour consulting, styling furniture for showrooms, and home staging.

Jennifer is proud to have built a business on integrity, a desire to help, and always creating a win-win situation for her clients and her team. “When I receive feedback, or get referrals, I see that by being authentic and fair in our business practices, we have grown effortlessly. I started out with nothing in [the] OSEB [program] in 2015 and now I have a moving truck, a warehouse with enough inventory to stage 20 houses, and two full-time staff.”

In 2015, Jennifer was granted a Rise low-interest loan for a truck, vehicle wrap to transport furniture for staging and marketing material to grow her business. She believes that she is proof that “when given a little support, a purpose and enough belief in yourself, anything is possible.” Four years into her business plan, Jennifer’s next goal is to get another truck. She also would love to create a social development enterprise that could train and employ single mothers.

# w i n n e r s

## RISE-ING YOUNG ENTREPRENEUR OF THE YEAR AWARD



 @POLARWRKPLACEMH

 /POLARWELLNESS

[WWW.POLARWELLNESSCONSULTING.COM](http://WWW.POLARWELLNESSCONSULTING.COM)

### Sarah Lindsay

With over a decade of experience with the mental health system and chronic mental health at school and work, Sarah Lindsay launched Polar Wellness Consulting in 2016. Since its start, Polar Wellness has offered workshops on mental health in the workplace to almost 2,000 students and employees across Ontario.

A graduate of Rise's award-winning Youth Small Business Program (YSBP), Sarah says she is lucky that through Polar Wellness she is able to answer stigma-laced questions with humour and empathy. She also says she is proud that she gets to see people's minds change about what it means to be mentally ill and about mental health.

Sarah credits her time in the YSBP classroom for the very existence of her business. After seeing her speak at a volunteer event, the YSBP facilitator at the time insisted that Sarah could make a career out of her advocacy. Sarah joined the Youth Small Business Program in late 2015, and created her business plan to start Polar Wellness Consulting.

With attitudes towards mental health changing and a new generation entering positions of leadership, Polar Wellness finds itself in the middle of a complex debate about mental health at work. When you ask Sarah what's next for Polar Wellness, the ambition that makes her the RISE-ing Young Entrepreneur of the Year is evident. "I hope Polar Wellness can continue and grow existing relationships with the Ontario Chamber of Commerce, student organizations and companies across economic sectors to be an important voice in our conversation about what these big changes [in protecting employees' mental health] mean for our future."



# w i n n e r s

## SHOPPERS.LOVE.YOU FEMALE ENTREPRENEUR AWARD



DJESSIKA EMUNGANYA  
[WWW.DJELANGUAGE.COM](http://WWW.DJELANGUAGE.COM)

### Djessika Emunganya

Djessika Emunganya is the owner of Kingston-based DJE Language Academy and Translation Services, a private language school that offers language training and translation services to the provincial and federal governments, as well as to individuals and the corporate sector.

In 2015, Djessika, pregnant with her second child, came to Canada from the Democratic Republic of Congo with her five-year-old daughter. She quickly earned a BA in Translation from York University and began working as a translator at SDL Linguistics. She has also served as a language instructor at Université Sainte-Anne in Halifax and as a Pedagogical Advisor in both PEI and Kingston, providing a solid foundation for her own business.

In 2016, Djessika received a low-interest loan from Rise to purchase items to open her private language school. The loan also helped her bid on a contract with the government, which she got. She prides herself on helping people acquire a second language to improve their job prospects.

Going forward, Djessika would like to grow her business to accommodate the demand for her services. She recently got a second government contract and is hoping to receive more contracts in the near future.



# honourable mentions



f /TALENT2DESIGN  
WWW.TALENT2DESIGN.COM



## LISA ALLAIN

Lisa Allain is the owner of Welland-based Talent 2 Design, an award-winning bakery that has been making premium custom-made cakes, cupcakes, cookies and edible celebration favours since it opened in 2016. She received a Rise low-interest loan in 2017 that she used to purchase equipment and a vehicle for her business.

Lisa says that Rise has been instrumental in her success today. “I started my business despite numerous obstacles including a brain injury and brain tumour diagnosis. In under two years, my business went from a hobby in my kitchen to a store front commercial facility. I have now hired staff, who like me have disabilities, allowing them a second chance.” With the help of her Rise Business Advisor, she hopes to grow Talent 2 Design into Niagara’s #1 source for custom edible pieces of art.



f /DAVIDHARBOURLIFEWASAGABEACH  
WWW.HARBOURLIFE.CA



## DAVID ANTEBI

With over 30 years of experience as a pharmacist and business owner, David Antebi founded Harbourlife Holistic Remedies. Harbourlife offers holistic therapies, including chiropractic and nutrition treatments, as well as consultations and natural health products and has established a fair client base in the Wasaga Beach area over the past two years.

In 2017, David received a Rise low-interest loan for marketing materials, a POS system, inventory and insurance. He says the loan helped Harbourlife become mobile and is currently presenting his business plan to StarterPlus Grant Committee advisors, thanks to the help of his Rise Business Advisor. He looks forward to growing his business even more in the future.



KRISTEN GREENLEES  
WWW.GREENLEESCONCIERGE.COM



## KRISTEN GREENLEES

Kristen Greenlees, owner of Greenlees Concierge, an eco-friendly personal concierge service, has been operating her business in Toronto since 2014. With previous experience as a personal assistant, she prides herself on having a business built on relieving people of their day-to-day errands and tasks so that they can enjoy their free time.

As a graduate of Rise’s award-winning Youth Small Business Program, Kristen overcame her anxiety about investing in her business and was able to turn her part-time side gig into her career. She is now working on getting her driver’s license so that she can provide a wider range of services and would like to eventually expand her business to include a small staff to help her perform tasks for clients.



*La Baguette Magique*

f /BAGUETTEMAGIQUESUBURY

@/LABAGUETTE.MAGIQUE

## ÉMILIE HÉBERT

After having developed an interest in and passion for baking as a young girl, Émilie Hébert launched La Baguette Magique, a home-style bakery, in 2017. She credits her time with Rise's award-winning Youth Small Business Program for teaching her how to make her dream of starting a baking business a reality.

Émilie was also approved for a Rise low-interest small business loan which helped her launch her business. "Without this small business grant and loan, it never would have been possible for me to start La Baguette Magique or grow it to where it is today." Next, Émilie is looking to hire a part-time employee in order to expand her product line, grow her customer pool and attend more events. She is also in the process of acquiring wholesale customers by partnering up with some local grocery stores, cafés and restaurants.



PERSONAL & Corporate  
**Ace Tax Guy**  
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647 781-5213



@ACETAXGUY

f /STEPHEN.MIKUS.56

WWW.ACETAXGUY.CA

## STEPHEN MIKUS

Stephen Mikus is the owner/operator of Toronto-based Stephen Mikus Books, an accounting/bookkeeping business that focuses on supporting businesses through corporate book entry and taxes as well as personal tax filing.

With a background in Business Accounting, Stephen worked as a bookkeeper for several years and has over a decade of sales experience. He received his first low-interest loan from Rise in 2015 for a laptop and has since been approved for a second Rise loan to pay for additional resources. He is grateful for the feedback provided to him by his mentor and hopes to continue expanding his business.



*Courage to Self*

JULIE VACHON

WWW.COURAGETOSELF.COM

## JULIE VACHON

With years of experience working with Elders and ceremony to develop a good connection with Spirit, Julie Vachon, owner of Courage to Self, provides First Nations cultural awareness education, group and personal consultations, and creative art workshops for personal growth.

Having worked with Rise to develop her business plan and having received two of Rise's low-interest loans, the first of which she has paid off, Julie speaks of the value of Rise to her business. "I can't tell you how grateful I am for this amazing program. I know I would not be where I am today if I had not had the opportunities provided by Rise. The feedback and support has been so empowering." Julie hopes to do more with creativity in the future.

# RISE Volunteer of the Year Award



## JAMES STUART

This year, James Stuart is the recipient of the Rise Volunteer of the Year Award. Since September 2016, James has been an active Rise Youth Coach. During that time, he has worked with four different mentees to help them develop their business ideas. James, who holds a BKin from Brock University and is a graduate of the MBA Program at Rotman, has 10 years of experience working in operations and supply chain management in the apparel industry that, along with his understanding of design thinking, he uses to help mentees develop their apparel and fashion businesses.

On a mission to drive innovation and sustainability in the apparel and fashion industries, James serves as an advisor with Ryerson's Fashion Zone in addition to his volunteer work with Rise. He is also passionate about supporting the Toronto arts community and serves as an executive on the Young Leadership Council with the Toronto Symphony Orchestra. Regarding his extensive volunteering activity, James says: "I volunteer because I recognize and am thankful for the opportunities and support that I was given when I was growing up. I am now in a position, and believe I have a responsibility, to contribute my knowledge and skill sets to programs that provide similarly valuable experiences and opportunities for others."

On a personal note, James is an avid rock climber in the summer and ice climber in the winter. He can often be found in the west end of Toronto, running around in circles training for the next half-marathon.

James explains that he chose Rise "because it is a rare organization that believes mental health challenges should not stand in the way of fulfilling entrepreneurial ambitions. I support how Rise embraces the different ways its participants view the world as assets and helps them see that entrepreneurship is not out of reach. I believe in how Rise leverages the power of design thinking to help participants not only grow their businesses, but also their confidence and self-esteem."



## honourable mentions



LEFT TO RIGHT: PRIYA KUMAR,  
STEFANIE STOZEL, CERYS GOODALL

### CERYS GOODALL

Cerys started volunteering with Rise in 2016, supporting both our Small Business Lending and Youth Small Business programs. With experience creating memorable marketing communications programs for local startups like Kobo, Freshbooks and LEAGUE, Cerys helps Rise clients develop marketing communications programs that are creative, impactful, and empowering. Her most recent Rise client created an engaging communications program that resulted in a Globe and Mail feature. But it's perhaps her work with students that stands out, with many still in contact with her beyond the program as they continue developing their businesses.

Cerys chose to volunteer with Rise because “I was looking for a way to give back to a community that was underserved. Where I could make a difference. Where I could work closely with individuals in their journey without prescribing what success looks like. Rise does an excellent job of fostering creativity, personal motivation, and layering in fundamental business skills to empower their clients for success.”

### PRIYA KUMAR:

Priya has served as a Youth Coach for multiple cohorts of the Youth Small Business Training program where she has consistently gone above and beyond her role. Priya has strong active listening skills and always puts her client's needs first. She takes a co-creation and collaborative approach with students and other coaches alike, focusing on the client's vision and putting her own biases aside. As well, Priya frequently offers to meet with clients outside of the mandatory coaching sessions if they need additional support.

On why she chose Rise, Priya says: “Rise is the perfect example of equity, opportunity, and empowerment. Here, I can share my passion for design thinking and business development with aspiring youth, as we work together to eradicate stigma related to mental health and addictions.”

### STEFANIE STOZEL:

Stefanie has been both a mentor and Youth Coach in London. As a Youth Coach, she was an enthusiastic and supportive volunteer and did an excellent job. As a mentor, Stefanie has gone above and beyond to make extra time for her mentee and provide advice and support both from a business and personal wellness perspective.

When asked about why she chooses to volunteer with Rise, Stefanie explains that “I experienced mental health challenges after [my] first daughter was born. And [my husband and I] are dealing with it in our small business on a regular basis. Rise offers a unique opportunity for young people to live their dreams and overcome their challenges. This program shows them that success is possible and that resources are available.”



Throughout this past year, the Rise staff and board continued to execute the Rise National Scaling Strategy, making investments in human resources, information technology, program services and impact evaluation processes. Partnership outreach was a key feature of our activities this year, with travel to British Columbia, Alberta and the Atlantic resulting in highly increased awareness of Rise services and offerings across the country. Much of this work was a direct result of the hands on management support and pro bono contributions of social purpose consultants Lift Philanthropy Partners, who have assisted in the development and operationalization of our Scaling Strategy.

## KEY 2017/18 MILESTONES

- *The Ontario Ministry of Health and Long-Term Care finalized a three-year commitment to support the activities of Rise's Small Business Lending program.*
- *BDC, along with a private foundation, established an innovative loan fund to meet Rise's loan capital requirements*
- *Better tracking and support of entrepreneur outreach, loan application process development, and repayment, was put into effect with the implementation of a constituent relationship management system.*
- *We established three new staff positions: Data & Digital Services Manager, Youth Small Business Program Manager and Loan Administrator*
- *We welcomed Michael McCain and several anonymous donors to our roster of supporters*
- *In November 2017, we reached the \$1,000,000 mark in funds lent, through a loan to Bernard Walters of Big B Disposal Services in Toronto.*
- *Rise was awarded \$80,000 in pro bono advisory services contract through the Deloitte Social Innovation Fund*
- *We approved our first loan through our collaboration with the Matawa First Nations Management and CESO, funded by the Ontario Poverty Reduction Fund*
- *We released the first annual Rise Social Inclusion Survey*

*For detailed information on Rise's ambitious goals and strategies to succeed, see the National Scaling Strategy and access the full report.*





**282**

youth received free Rotman DesignWorks business-design training



**413**

emerging entrepreneurs received startup support from a Rise grant



**298**

volunteer entrepreneur coaches and mentors

**rise**  
**100%**

Started in 2010, Rise exclusively serves people with a history of mental health and addiction challenges with supported entrepreneurship services



**7.7%**  
default rate



approximately  
**\$1.2 million**  
in capital disbursed



**94%**

growth in the loan fund over the last two years



**226**

men and women received free small-business training with additional support from their peers



**11%**  
of loan clients return to Rise for additional funding

entrepreneurs supported by a Rise low interest small business loan



**309**

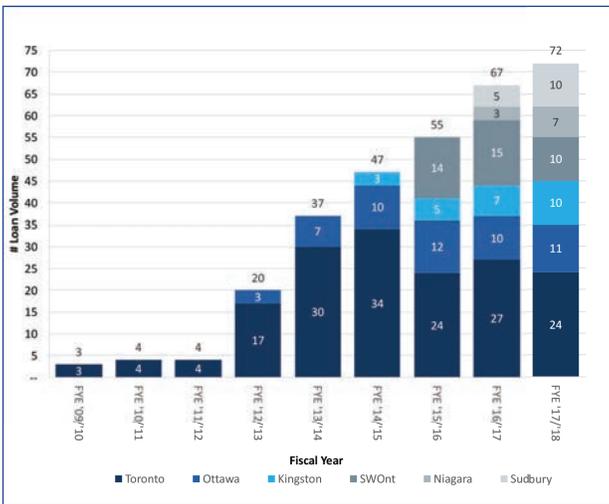
low interest small business loans issued to Rise entrepreneurs

## SMALL BUSINESS LENDING

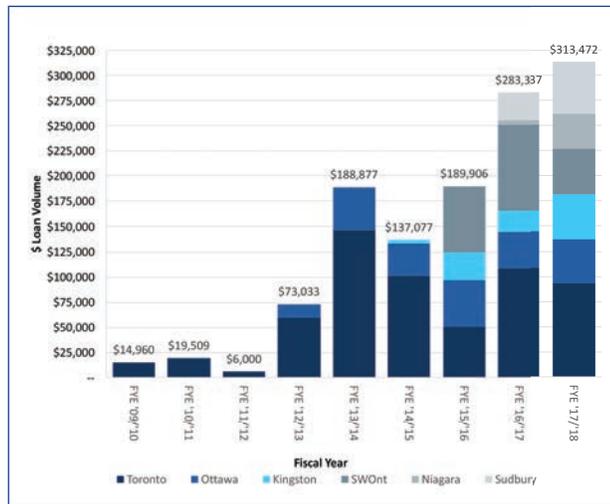
We continue to grow the loan portfolio within Ontario, and once again have had the biggest year-to-date loan volume. The growth is evidenced by total loan disbursements of over \$313,000, a stable low default rate of under 8% and an expanded reach that has 68% of our 2018 lending volume sourced outside Toronto.

A new project is underway in collaboration with Matawa First Nations and CESO to provide small business loans to indigenous entrepreneurs in remote communities north of Thunder Bay. We expect the first loans to be disbursed in Fiscal 2019. In accordance with our National Scaling Strategy, we will have our first office outside of Ontario in early Fiscal 2019, in partnership with Teamwork Cooperative Self-Employment Services, Halifax, Nova Scotia, and will secure a location secured in another province later in the year.

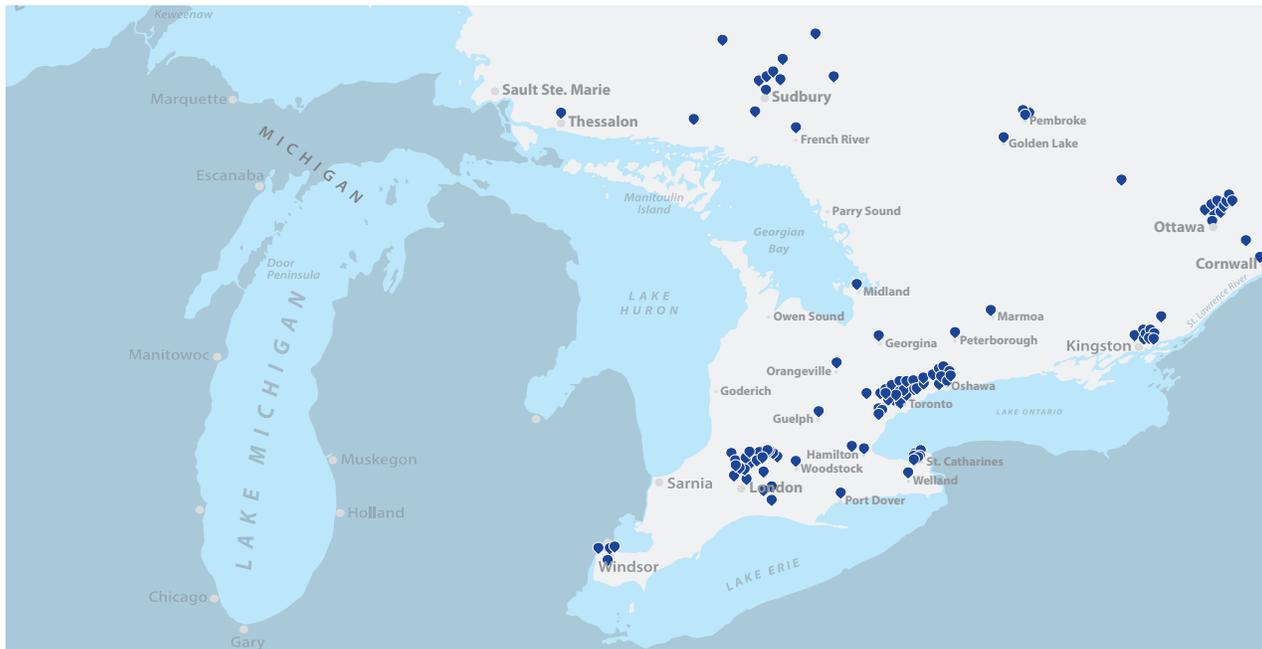
ANNUAL LOAN VOLUME BY LOCATION (#)



ANNUAL LOAN VOLUME BY LOCATION (\$)



LOANS BY CLIENT LOCATION (APRIL 1, 2015 - APRIL 30, 2018)





## DESIGNING THE FUTURE WITH THE YOUTH SMALL BUSINESS PROGRAM (YSBP)

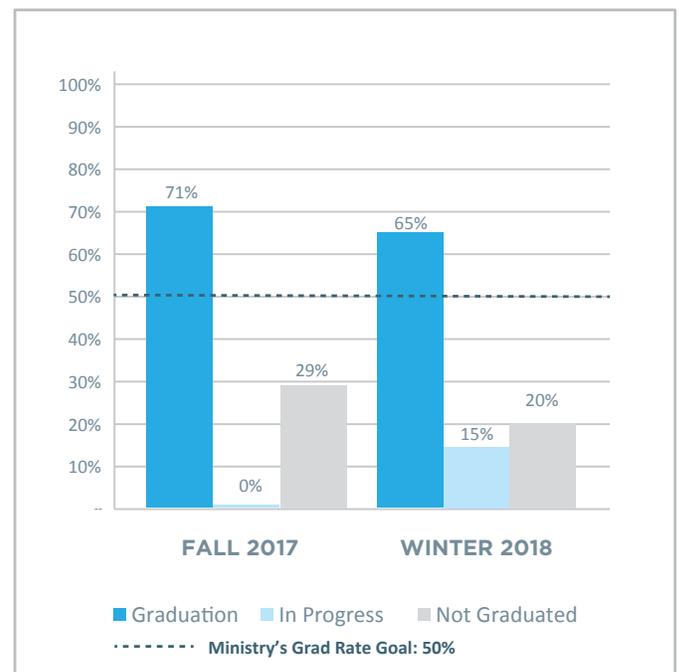
YSBP reached 37 young entrepreneurs with the delivery of two sessions in Toronto. This resulted in the creation of nine businesses in the Greater Toronto Area. We are grateful for the Ministry of Child and Youth Services' continued support for the Toronto sessions. Rise was thrilled to be given a one-time grant from Citi Foundation in support of developing EnterpRISEing Youth. Set to launch in the summer, this online platform will help youth across Canada explore entrepreneurship and business design.

ABOVE: LEFT TO RIGHT: KRISTEN GREENLEES, ÉMILIE HÉBERT (FORMER YSBP GRADUATES AND HONOURABLE MENTION RECIPIENTS AT THIS YEAR'S GARFINKEL AWARDS)



YSBP GRADUATES (FALL 2017 COHORT)

GRADUATION RATE (PAST TWO COHORTS)





PSSP GRADUATES

## PEER-SUPPORTED STARTUP PROGRAM

# It's Better with Peers!

Developing core business, mentoring, and business advisory support, are the hallmarks of the Peer-Supported Startup Program (PSSP). Add to that, collaborating with peers who are also starting their businesses gives you a strong hand at your back. The program started in 2012 and has delivered at least one session each year in Toronto. In 2014, it was successfully piloted in Mississauga. Support from the Ministry of Health and Long-Term Care ensures PSSP will continue to be offered through 2019 in Mississauga.



# Mentoring



ABOVE: RISE MENTORS RICHARD BRYER (LEFT) AND JAMES STUART (RIGHT), RECIPIENT OF THE 2018 RISE VOLUNTEER OF THE YEAR AWARD



JAMES STUART, 2018 RECIPIENT OF THE RISE VOLUNTEER OF THE YEAR AWARD



RISE MENTOR RICHARD BRYER



RISE MENTOR AND YOUTH COACH FILIP IVANOVSKI, RECIPIENT OF THE GOVERNOR GENERAL OF CANADA'S CARING CANADIAN AWARD FOR VOLUNTEERING



RISE MENTORS STEFANIE STOZEL (LEFT), HONOURABLE MENTION RECIPIENT FOR VOLUNTEERING AT THIS YEAR'S GARFINKEL AWARDS AND RICHARD BRYER (RIGHT)

Mentoring is an important part of the support Rise offers its clients. It provides our entrepreneurs with business advice from someone successful who has relatable skills.

Knowing that there is an expert to turn to for advice, who has been trained to work with people experiencing mental health and addiction challenges, who will not judge, and who has your interests at heart, helps build client confidence and alleviate anxieties.

The mentor program continues to grow. New resources supported Rise's recruitment of 70 more mentors, a 45% increase in the total number of mentors. There are just shy of 300 volunteers at Rise, members of the business community who willingly share their experience and knowledge with entrepreneurs who are starting or building their businesses.



# Our Valued Supporters

Our donors, partners and volunteers give us the benefit of their expertise, their valuable time, and their funds, making our success possible and enabling us to provide the programs we do. Our programs continue to make better lives for Canadians with a history of addiction and mental health challenges. “Thank you” seems inadequate, considering the profound effect their efforts have in our clients’ lives and the future of our society.

## IMPACT DONORS

### Province of Ontario

The Ontario Government has provided critical funding to Rise since 2012, providing capital for the Loan Fund and financial support for our Business Advisors. Ontario supports our efforts to help marginalized youth become successful entrepreneurs and contribute positively to the future of our communities and our economy. The Ontario Government also supports the delivery of peer-supported business startup services to men and women in Mississauga.

### Janis Rotman

Ms. Rotman brings generosity and commitment to helping people with mental health and addiction challenges run successful businesses and live better lives. Rise is thrilled to have the benefit of Ms. Rotman’s strategic philanthropy.

### Bell Let’s Talk and RBC Foundation

In 2016, Bell Let’s Talk and RBC Foundation partnered to contribute a total of \$1 million to Rise for expansion of programs that help talented individuals become successful entrepreneurs without the stigma of addiction or mental health.



## PROGRAM DONORS

### Citi Foundation

Citi Foundation has been a program donor since 2012, contributing to Rise's Peer-Supported Startup Program and other initiatives.

## DONORS

**Shoppers. LOVE. YOU.**, supporting female entrepreneurs in the Rise program  
Michael McCain and Family

## CAPITAL PARTNERS

### BDC

The Business Development Bank of Canada and a private foundation partnered with Rise in 2018 to create an innovative loan fund to meet Rise's loan capital needs for several years.

## IN-KIND DONORS

**Rotman DesignWorks** donates curriculum to YSBP, teaching how to integrate intuitive and analytical ways of thinking about business: using empathy, prototyping and strategy to initiate and implement innovation.

**Osler** provided extensive pro bono legal support to establish the Rise Loan Fund with BDC.

**Rain 43** contributes its creative services on a pro bono basis for our Annual and National Scaling Reports.

**LIFT Philanthropy Partners** provides advisory and capacity-building support to help Rise expand their programs.

**Deloitte** provided extensive advisory services work on Rise's behalf, working with the Mental Health Commission of Canada to conduct a Canada-wide environmental scan of the employment and self-employment landscape.

## FOUNDING DONOR

### Sandra Rotman

Sandra Rotman founded Rise Asset Development with a gift of \$1 million in 2009, and remains an active member of the Board of Directors today

## KNOWLEDGE PARTNERS

We want to thank our knowledge partners, Rotman School of Management and the Centre for Addiction and Mental Health (CAMH) for lending their respective expertise to empower people to succeed as entrepreneurs.

## COMMUNITY COLLABORATORS

Many thanks to our Community Collaborators who provide much more than office space and resources. Our partnerships with you give us a respected presence in the community that engenders trust in our clients.

**Causeway Work Centre** – hosting Rise Ottawa

**Small Business Centre** – hosting Rise London

**AMHS-KFLA** (Addiction and Mental Health Services – Kingston, Frontenac, Lennox & Addington) – hosting Rise Kingston

**The Learning Initiative** – hosting Rise Sudbury

**Start Me Up Niagara** – hosting Rise Niagara

**Team Work Cooperative** – hosting Rise Nova Scotia



# Thank You!

## IMPACT DONORS



## FOUNDING DONORS



## PROGRAM DONORS

Citi Foundation



## DONORS



## IN-KIND DONORS



## COMMUNITY COLLABORATORS

Community Collaborators:



## BOARD OF DIRECTORS

We want to thank all our Board members for their 100% donor participation. Through your efforts, Rise continues to grow and positively impact our people and our communities.

Directors:



JOEL BAUM,  
DIRECTOR



CAROLYN BURKE,  
SECRETARY



KATHLEEN COULSON,  
EX-OFFICIO



ROBERT MCGUIRE,  
CHAIR



CRAIG RYAN,  
DIRECTOR



SANDRA ROTMAN,  
HONORARY MEMBER



DAVID R. SMITH,  
TREASURER

## INVESTMENT COMMITTEE

Thank you to our Committee Members for your dedication and expertise. If not for the quality and commitment of our volunteers, the conversation and outcomes of our cases would be vastly different.

Committee Members:

Jean Barrett

Joel Baum

Kathleen Coulson, Chair

Ron DiFrancesco

Franklin L. Hall, Vice Chair

Leslie Lewis, Vice Chair

Lauren Okpokpo

David Skelly

Claire Urbain

Art Wilson



## RISE TEAM

Justin Carter, Data and Digital Services Manager

Sarah Conway, Kingston Community Outreach & Business Advisor

Steve Cope, GTA Community Outreach & Business Advisor

Elle Crevits, Ottawa Community Outreach & Business Advisor

Beth Dea, Chief Operating Officer

Carla Kendall, Peer-Supported Startup Program Facilitator

Kimber Kunimoto, Youth Small Business Program Lead

Kiran Moid, Peer-Supported Startup Program Coordinator (Mississauga)

Michael Mouradian, Mississauga Community Outreach & Business Advisor

David Proudfoot, London Community Outreach & Business Advisor

Sheryll Reid, Peer-Supported Startup Program Facilitator (Mississauga)

Diana Safina, Loan Administrator

Geff Stutman, Mentorship & Strategic Projects Leader

Vern Vautour, Niagara Region Community Outreach & Business Advisor

Sally Wilkie, Small Business Lending Program Manager



# 2018 Social Inclusion Survey

## Social inclusion:

*participation in one's community under conditions which enhance well-being and individual potential*

### Personal Well-Being

a sense of purpose  
enhanced potential  
meaningful social  
networks

### Professional Well-Being

meaningful work

### Financial Well-Being

socioeconomic needs  
are met

## 2018 Survey Results

### Personal Well-Being

**72%** of our clients agree that they feel they are playing a useful part in society

### Professional Well-Being

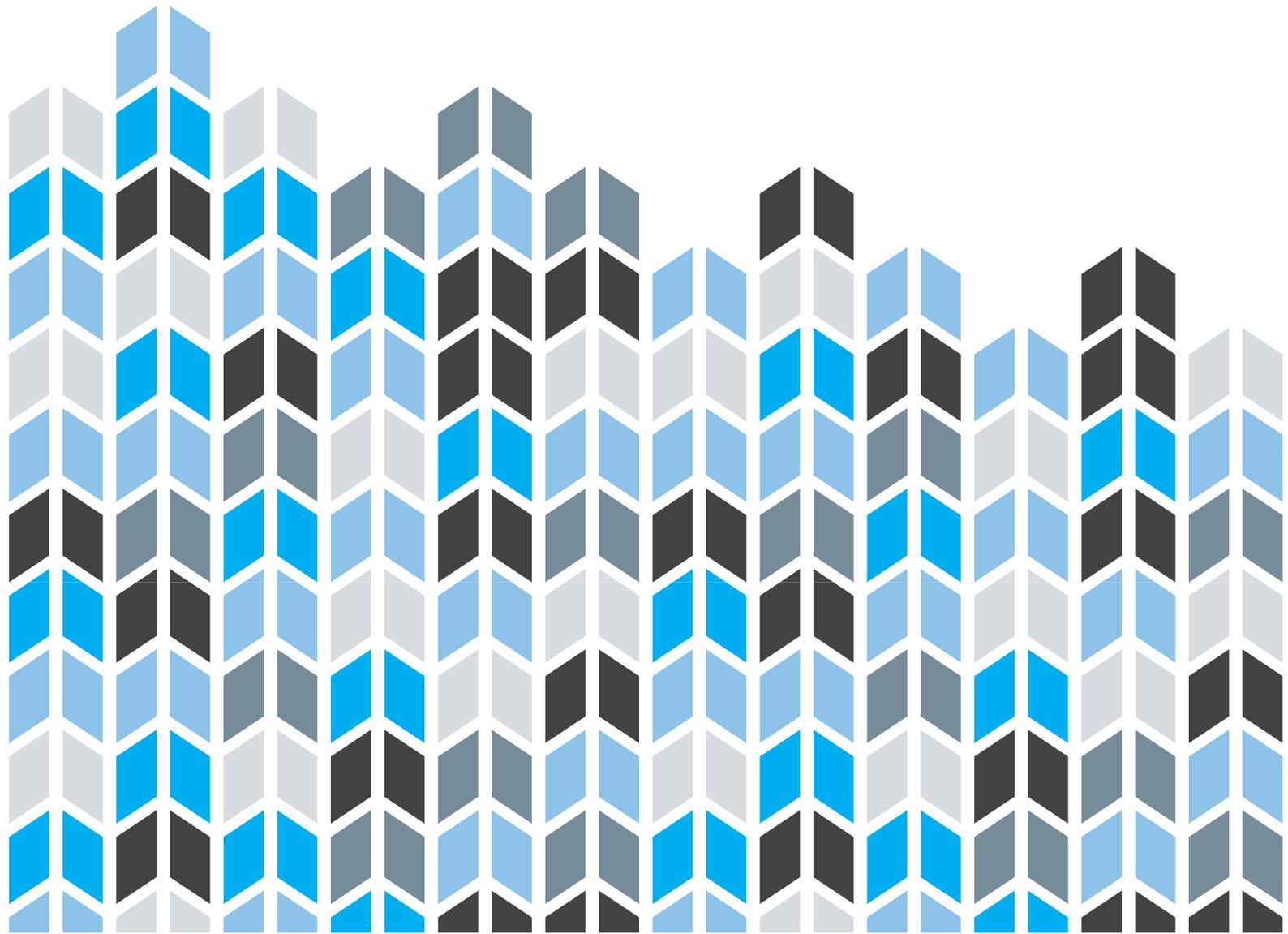
**75%** agree that their opportunity to access knowledge and professional advice has increased

### Financial Well-Being

**↑ 38%** average increase in personal and business income since working with Rise

**↓ 67%** average decrease in income support since working with Rise

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