

# RISE ABOVE



Empowering people  
Launching ideas

STRATEGIC PLAN  
2021-2023

# MISSION, VISION & VALUES

## MISSION STATEMENT

Rise empowers Canadians with mental health and addiction challenges to achieve greater economic and social inclusion through entrepreneurship training, small business loans and custom supports.

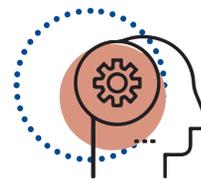
## VISION STATEMENT

Strengthening communities by unleashing the entrepreneurial spirit of all Canadians with mental health and addiction challenges.

## VALUES



CARE



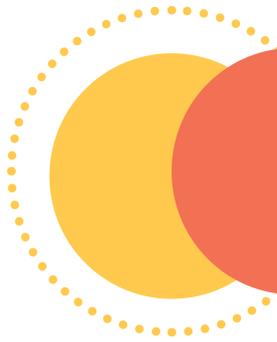
EMPOWERMENT



INCLUSION

## ULTIMATE IMPACT STATEMENT

Improved quality of life for people with mental health and addiction challenges.



# RISE ABOVE IS A RALLY CRY

In 2020, Rise proudly celebrated our 10th anniversary and all the accomplishments of the clients we served in our first decade. With that important milestone now behind us, we look towards the next 10 years with an ambition to grow our impact and build a resilient organization prepared to face new and unexpected challenges and opportunities, like those recently presented by COVID-19.

The global pandemic has tested us all—not only affecting our mental health, but also our ability to work, to deliver programs and to simply be together. Despite the difficulties, the individuals that Rise serves also possess an incredible potential to contribute to Canada’s economic recovery.

*Rise Above: Strategic Plan 2021-2023* is a rally cry to all Canadians with mental health challenges who aspire to entrepreneurship—we need your passion, drive and creative genius to help push our communities past this pandemic. Small business and self-employment will be key to the restoration of Canada’s economy. They also represent a proven and powerful pathway for individuals experiencing barriers to employment as a result of mental illness to achieve meaningful economic and social inclusion.

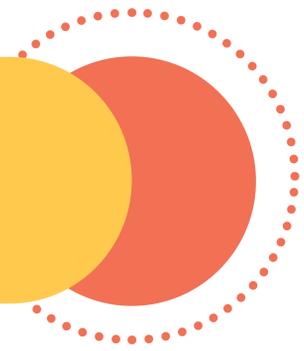
Regardless of when the virus is eliminated, the effects of COVID-19 will be felt by our society for years to come. Through it all, Rise will be there, mobilizing our community to help empower all Canadians with mental health and addiction challenges towards a brighter future through entrepreneurship.

Sincerely,

Lori Smith  
Chief Executive Officer, Rise



# RISE TO THE OCCASION



In our first decade, Rise has proven the efficacy of our program model and defined the critical role of entrepreneurship in empowering individuals with mental health and addiction challenges towards greater economic and social inclusion. Over 10 years, we disbursed **more than \$2 million** through our Lending Program and established additional training and mentorship programs that have enabled us to help launch **1000+ dreams**.

When COVID-19 struck in early 2020, our work took on new urgency, as we found ourselves uniquely positioned to address two issues dramatically impacted by the global pandemic: Canadians' mental health and our nation's economic recovery.

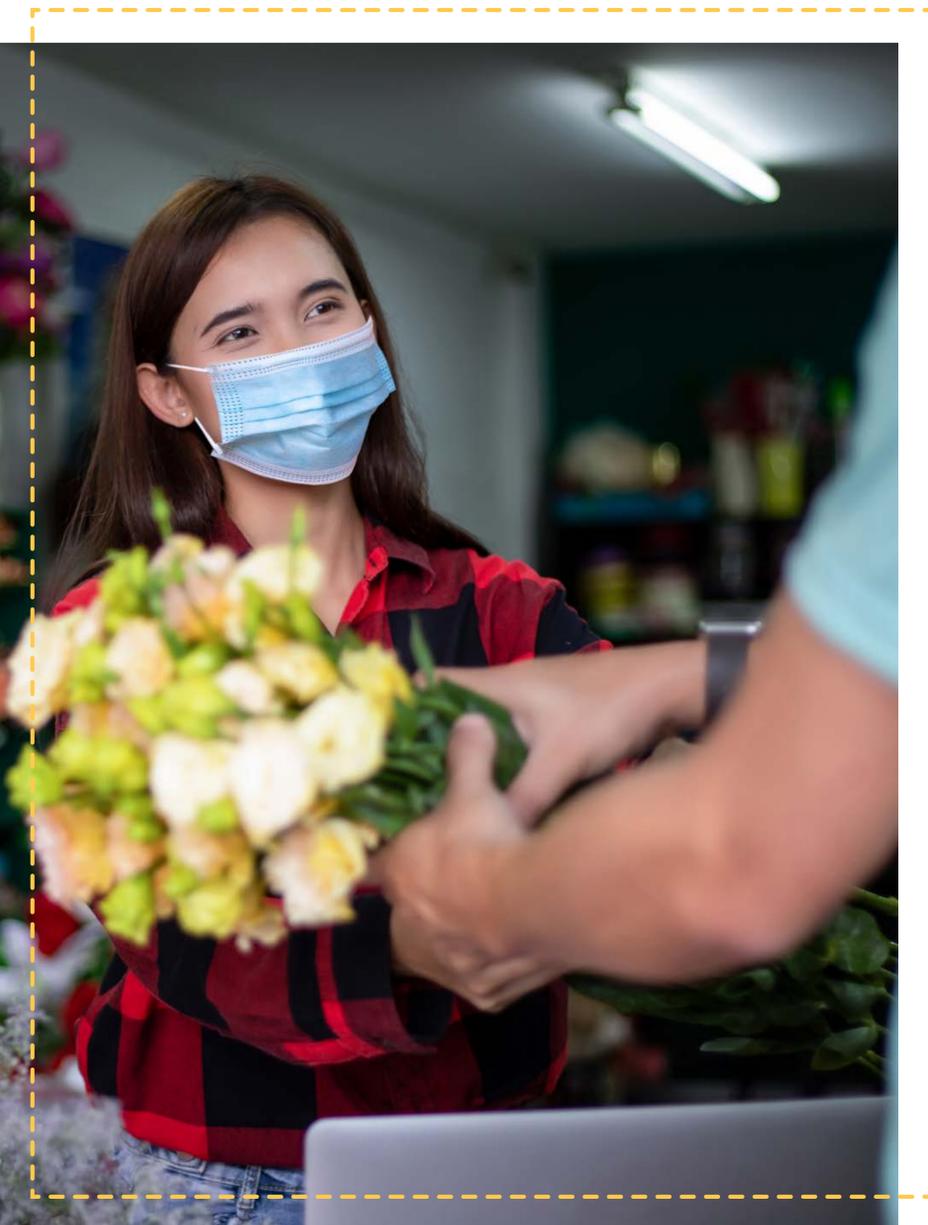


## *Helping the Community Cope*

In any given year, one in five Canadians will experience a mental health or addiction challenge. COVID-19 has only exacerbated that statistic—50% of Canadians report that their mental health has worsened during the pandemic.

We know that amongst the population of people with disabilities, those with a mental illness face the highest degree of stigmatization in the workplace and the greatest barriers to employment. According to the Canadian Mental Health Association, the unemployment rate of people with a serious mental illness is reported to be in the range of 70-90%, while unemployment rates among people living with depression or anxiety can be over 30%.

We also know that when it comes to empowering individuals with mental health and addiction challenges towards economic stability, entrepreneurship is a powerful solution.



## Recovery Through Entrepreneurship

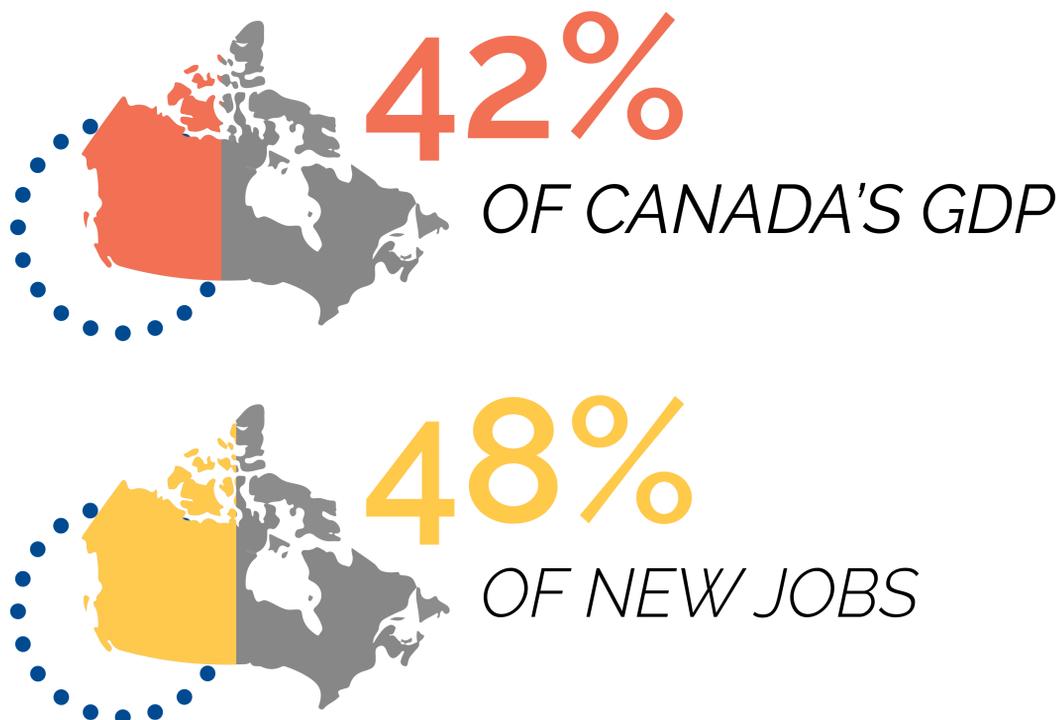
Canadian small businesses have borne the brunt of the unprecedented economic downturn induced by COVID-19.<sup>1</sup> Yet, as the heart of our communities, **small businesses represent 42% of Canada's GDP** and **48% of new jobs**, meaning Canada's pandemic recovery will depend on small businesses rebounding and new ones launching.

The data supports our conviction that many Canadians will explore entrepreneurship out of both choice and necessity to emerge from this crisis.

Economic trends during past recessions indicate that self-employment tends to increase during challenging times.<sup>2</sup> For example, from October 2008 to October 2009, self-employment in Canada rose by 3.9%, while paid public sector employment fell by 1.6% and private sector by 4.1%.<sup>3</sup> At Rise, we've witnessed a similar trend firsthand—in the early days of the pandemic, we saw a marked decrease in new loan applications. However, by July 2020, we saw our number of loan applications and the amounts being requested start to increase, leading to a higher number of applications in October and November 2020 as compared to the same months one year before.

SMALL  
BUSINESSES

=



*"Rise allowed me to take my business to the next level. I didn't think I'd work again after my accident, but thanks to Rise, I'm running a full-time, successful small business!"*

—**Sandra Williams,**  
**Lending Program Client**



## Reaching Those Most Affected

According to the Government of Canada's Fall Economic Statement 2020, *Supporting Canadians and Fighting COVID-19*, this pandemic "has laid bare – and in many cases deepened – the inequalities in Canadian society." In addition to the social and economic factors already affecting employment opportunities for women, Black, Indigenous and People of Colour (BIPOC), and persons with low income, COVID-19 has hit these communities especially hard. Women, youth, people living with disabilities and low-income workers have experienced higher rates of job and wage losses—a concerning trend that holds true for racialized and newcomer communities as well.

Rise currently serves a client base that is **60% women**, **57% persons with low-income**, and **32% BIPOC** and further engages youth in entrepreneurship through targeted skill-building programs.

Committed to diversity, equity and inclusion, Rise will continue to increase our efforts to reach individuals of vulnerable and underserved populations across Canada to provide the lending, training and mentorship resources that can help them to change their lives and communities through financial independence and business ownership.

### RISE'S CURRENT CLIENT BASE



**WOMEN**



**LOW-INCOME**



**BIPOC**

*“One of the highlights of Rise’s Training Program was the information regarding branding and marketing. The information I learned made my work slightly easier.”*

*— Jordel Downey,  
EntrepRISEing Youth+ Program Participant*



## *Learning Into Action*

In our immediate response to the pandemic, Rise adapted our tradition of in-person programming to online delivery platforms. It was a necessary and critical pivot that has demonstrated a tremendous opportunity for us to upgrade our digital capacity and expand and diversify our client base through a balance of virtual and in-person programming.

Already occupying a unique space by offering both training and access to capital for individuals with mental health challenges, through our strategic plan, Rise will continue to build awareness, resources and opportunities at the intersection of mental health and business to support and empower both aspiring entrepreneurs and those working to keep their businesses afloat through COVID-19 and beyond.



# CLIENT IMPACT: PAYING IT FORWARD



After founding his company, FundQi, to help match University students with relevant grants, bursaries, and scholarship opportunities, Zuberi Attard's struggle with severe depression and other mental health challenges began to threaten his business. Facing significant resourcing and operational obstacles, Zuberi says, "I couldn't see any way for us to get to the next step."

Thousands of dollars in debt and beginning to feel like a lost cause, a friend introduced Zuberi to Rise, where he secured mentorship and a loan to do what seemed impossible—move forward.

Today, FundQi is a sophisticated, fully automated and affordable online service that has **grown by 4000%**, helping clients secure an estimated **\$1.5 million in monies awarded**.

As a Lending Program client, in 2020 Rise awarded Zuberi its Rotman Family Entrepreneur of the Year award for his vision and perseverance as founder of FundQi, and for his dedication to paying it forward.

"FundQi wouldn't be here without Rise," Zuberi says. "Rise gave us a second chance and I want to be a success story... I'm not a lost cause—Rise showed me that."

*Rise gave us a  
second chance  
and I want to be  
a success story...*

— Zuberi Attard



# RISE ABOVE: STRATEGIC PLAN 2021-2023

## *Our Approach*

Rise's Board of Directors and senior management sought input from key stakeholder groups to develop a strategic plan that articulates our vision and mission, guides our work over the next three years, and sets the course for Rise's future.

## *How We Rise Above*

Having fulfilled our 2015-2020 strategy to scale nationally, *Rise Above: Strategic Plan 2021-2023* is a responsive organizational strategy focused on taking our work broader and deeper, helping more Canadians access pathways to economic independence.

The priority outcomes of this plan point in **three Strategic Directions**:

The full ambition of *Rise Above: Strategic Plan 2021-2023* is rooted in a deep commitment to fostering a caring and inclusive community that is dedicated to our mission; to our fundamental responsibility to lead by example in matters of diversity, equity and inclusion; and to the education, advocacy and advancement of mental health priorities.



## IMPACT

Empower more Canadians with mental health and addiction challenges as entrepreneurs through the delivery of effective, responsive, needs-based programs.

## COMMUNITY

Harness the power of our alumni, volunteers and partners to build a united national movement that fosters support and solidarity for Rise clients.

## SUSTAINABILITY

Lay the groundwork for our enduring success by creating sustainable digital infrastructures, harnessing new revenue streams and building a strong brand to boost our overall efficiency, capacity and value.

# STRATEGIC DIRECTIONS



## IMPACT

Empower more Canadians with mental health and addiction challenges as entrepreneurs through the delivery of effective, responsive, needs-based programs.

### GOAL 1

We will provide all Canadians managing mental health and addiction challenges with **compassionate, responsive and effective Rise programs** and deepen our program content to increase the knowledge and skills-education provided.

### GOAL 2

We will reach more people and **positively impact more lives** by promoting Rise to national audiences and building our digital capacity for recruitment.

### GOAL 3

We will improve our programs and develop a **high quality, robust approach to measuring our social impact** by using data effectively.





## COMMUNITY

Harness the power of our alumni, volunteers and partners to build a united national movement that fosters support and solidarity for Rise clients.

### GOAL 1

**We will empower our volunteers as mentors, advocates and leaders by harnessing their time, talent and passion to strengthen client success.**

### GOAL 2

**We will engage strategic partners across Canada to help maximize our reach, demographic diversity and program efficiency.**

### GOAL 3

**We will mobilize our network of inspired, motivated client alumni to become advocates of our work and active participants in driving the Rise community forward.**





## SUSTAINABILITY

Lay the groundwork for our enduring success by creating sustainable digital infrastructures, harnessing new revenue streams and building a strong brand to boost our overall efficiency, capacity and value.

### GOAL 1

**We will optimize business operations** by leveraging technology to move stakeholders through our pipeline efficiently and, maximize our digital platform delivery.

### GOAL 2

**We will increase our financial stability** by broadening our supporter base, and continuing to build our loan fund to ensure sustainable lending for the next 20 years.

### GOAL 3

**We will elevate the voices of our clients and all Canadians with mental health challenges who aspire to entrepreneurship,** advocating on issues of mental health and self-employment through their stories.



# Stay Connected



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Rise Newsletter

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