newpath network presents

TradeStorm '06
Strategies and Tactics for Sustainability of Not-For-Profit Organizations

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TradeStorm is an annual half-day event organized by **NewPath Network** and hosted by **Rotman School of Management's NeXus** initiative. Together, this years' conference will focus on the Social Enterprise model and applying 'for-profit' strategies in 'not-for-profit' organizations and projects. It is designed to acquaint not-for-profits, NGO's, Charities and Social Mission Organizations alike with the concepts of social enterprise, business intelligence, social capital funding and SROI metrics and as a forum for the exchange of modern best practices. Managers in the Not-for-Profit sector will have the opportunity to meet professionals from both the NewPath and Rotman NeXus organizations, build relationships with other Not-for-Profits and share knowledge and ideas in an informal environment.

Our objective is to share information, contacts and ideas on how to reduce dependencies on hand-outs, donations, grants and other diminishing and unreliable funding sources in favour of more self-sustaining revenue programs.

Our **Keynote Speaker** is **Bill Young**, founder of **Social Capital Partners**, a venture capital firm that finances social enterprises and measures SROI (Social Return on Investment) through a complex set of (still evolving) tools. Also speaking will be **Tonya Surman**, Founder of **Centre for Social Innovation**. Attend a series of case study presentations and workshops facilitated by members of both NewPath and Rotman NeXus reviewing projects undertaken in the not-for-profit sectors and designed as learning opportunities for the audience participants who may share similar challenges in their own organization.

Last but not least, join participants in a unique experience as we journey through a NewPath **IdeaStorm** session where a guest Not-for-Profit organization will present its challenges to a panel of our experts who will brainstorm concepts, ideas, possible approaches, solutions and strategies to address the challenges. This session will be open to spectators to allow them to witness the process and potentially extract key learning points for their own organizations. Simply put, it is designed to engage participants, stimulate new thinking and drag stubborn issues into the open to be addressed head on.

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EVENT DETAILS

Date:	**Thursday February 23rd, 2006.**
Time:	2:00 pm to 8:00pm
Location:	Rotman School of Management (U of T)
	105 St. George Street, Toronto, ON, Room 134

REGISTRATION

Advance:	$20 (before Feb.17, 2006)
Students:	$10 (before Feb.17, 2006)
At the Door:	$40 (space limited to 70 persons)

For more information,
visit www.newpathnetwork.org
or email us at tradestorm@newpathnetwork.org

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2:00pm	**Opening**

Alex Sirota, Founder ([NewPath](#)) & Ushnish Sengupta, Co-Founder ([Rotman NeXus](#))
Presentation by Kevin McIntosh, Chief Networking Officer ([NewPath](#))

Founding Members of NewPath Network and Rotman NeXus welcome participants and lay the groundwork & objectives for the conference and outline how NewPath and Rotman NeXus will collaborate.

2:40pm	**Revenue Generating Social Enterprises: A New Strategy for Creating Sustainable Models**

Bill Young, Founder ([Social Capital Partners](#))

Join us as Bill shares his unique experiences of financing social enterprises, applying for-profit strategies to social missions and on measuring SROI (Social Return on Investment). SCP is a venture philanthropy organization created to invest in and support revenue-generating social enterprises that employ at-risk populations outside the economic mainstream in Canada. The goal of these social enterprises will be to develop a national scope, exist without government funding, and create improved social outcomes and financial self-sufficiency for the populations they employ. Founded in 2001 and headquartered in Toronto, SCP is one of the only organizations of its kind in Canada.

3:50pm	**Social Enterprise Models**

Tonya Surman, Founder ([Centre for Social Innovation](#))

Making the transition from being a traditional not-for-profit organization to a Social Enterprise with a for-profit strategy is a tall order. Where does one even begine to start? Join Tonya as she shares her insights from 10+ years experience working in and running Social Enterprises including the ingredients for success ; explore why and how product planning, governance models and cash flow projections can make or break your project.

3:50pm	**Profit in the Non-Profit Sector: Organizations That Have Made It Work**

Lorraine McCallum, Consultant and Advisor to the Non-Profit Community

Some surprising results from those who have navigated the challenges and successes of creating income for their non-profit organizations. Lorraine McCallum is a passionate supporter of non-profits, with a 20-year background that includes an Executive Directorship at a bioethics institute, a long-term Board position, a successful social enterprise business, and extensive experience working overseas.

5:00pm	**IdeaStorm: [JVS Toronto](#)**

Sit in on an example of NewPath's actual IdeaStorm process as we target specific issues and objectives for JVS Toronto and develop unique approaches and potential solutions

6:00pm — Networking and Light Refreshments

Join us for some tasty refreshments prepared by a young Social Enterprise, The [Afgahn Womens Catering Group](#). Meet new people and share ideas and build your resource network.

6:40pm — Case Study: Cost Effective Approach to Redesign a Health Information Web Site for Usability and Effectiveness

Rami Tabbah, Principal ([Ergonaute Consulting](#))/Chief Organizing Officer ([NewPath](#))

Join Rami as he shares his cost effective approach based on one iteration to redesign a health information web site. The web site redesign proved to be clearer, easier to use, helped visitors find information faster, and consisted of all the design and content elements that reflect users' preferences.

6:40pm — Social Accounting for Nonprofits: The Expanded Value Added Statement

Laurie Mook, Manager ([Social Economy Centre, U of T](#))

Nonprofits are organizations with a social mission, and, as such, their social impact is a vital part of their performance story. The costs of nonprofits can be easily measured; however, not captured by conventional accounting is the value of their nonmonetized resources such as volunteers. This session provides an introduction to social accounting for nonprofits, and presents a case study in which the value added by volunteers of a nonprofit organization is combined with its financial statements in a social accounting statement called the Expanded Value Added Statement. By combining social and economic information, a very different performance story of the organization emerges.

7:40pm — Case Study: Bringing Your Program Logic To The Web

Phillip Smith, Principal ([Community Bandwidth](#))

The Web is a dynamic and evolving platform. Chronic under-funding and constant shifts in grant maker priorities make successful online initiatives a moving target for community-based organizations. But the opportunities that the Web brings for streamlining internal processes and extending client services to hard-to-reach populations should not go unexplored.
In this session, Phillip will facilitate a conversation about extending traditional program logic to the Web. Participants will work through exercises that deepen understanding of what's important online and how that relates to organizational objectives. This session will be user-driven and provide ample time for individual participation and questions.

7:40pm — Case Study: The Consolidation Of Local, Provincial And National Level Funding Operations Into One Organization Wide, Integrated Program

Gord Muschett, MBA & Angie Mackie, MBA, CFRE ([The Donnée Group](#))

Join Gord and Angie as they present their strategy for The Red Cross Ontario, Canadian Diabetes Association & Alzheimer Society of Canada.

8:40pm — Conference Wrap-up & Summary

Alex Sirota, Founder ([NewPath](#))

Angie Mackie, MBA, CFRE – Consultant, The Donnée Group

Angie has 15+ years of success, serving many of Canada's largest not-for-profit organizations. As an internal direct response manager, Angie's developed some of this country's most innovative and successful fundraising appeals. Angie has in-house experience with provincial, national and international agencies, including, Ontario March of Dimes, Canadian Red Cross and Canadian Diabetes Association. As a fundraising consultant for the last 6+ years, Angie's shared her firsthand knowledge with a great many other charities. For Angie…an organization's direct marketing success will be driven by how well it understands those who gave to it in the past and who might give again in the future. That is-the data. Angie's MBA from the University of Toronto further enhanced what was already a strong strategic background. Previously Angie acquired a degree in Communications from the School of Journalism and Communications at Carleton University. In 2002, Angie earned her CFRE designation.

Lorraine McCallum, Consultant, Not-For-Profit Sector / Member, NewPath

Lorraine is a passionate supporter of non-profits, with a 20-year background that includes an Executive Directorship at a bio-ethics institute, a long-term Board position, a successful social enterprise business, and extensive experience working overseas. She is most interested in helping organizations to increase their effectiveness by creating or strengthening revenue streams around core competencies. My expertise in creating and directing an income-generating innovation is currently available to the right organization.

Kevin McIntosh, Chief Networking Officer, NewPath

Kevin McIntosh has over 18 years experience in business development including 10 years as managing partner with a successful Executive Search and HR consulting firm. For the past three years, Kevin has turned his focus toward technology, helping start-ups bring their products to market, reinventing established companies and brands, and entering new markets by developing relationships with technology partners and resellers. He is currently Vice President, Business Development for Retail Systems Group and an active member of the NewPath Executive Team focusing on strategic planning, networking, communications, the monthly speaker series and new business development.

Laurie Mook, Manager, Social Economy Centre, U of T

Laurie Mook has degrees in accounting and international development, and a master's degree in educational policy studies. She is currently a Social Science and Humanities Research Council of Canada doctoral fellow at the Ontario Institute for Studies in Education of the University of Toronto. She developed the Expanded Value Added Statement model for social accounting, as well as several other social accounting statements. She is co-author of What Counts: Social Accounting for Nonprofits and Cooperatives (Upper Saddle River, N.J.: Prentice Hall, 2003).

Gord Muschett, MBA – Consultant, The Donnée Group

Gord completed an MBA specializing in data-driven marketing from of the world's top graduate Marketing Programs at Cornell University. Gord will help you to understand your data in a way that maximizes your fundraising efforts. And if there's an opportunity to segment your data more effectively using CHAID or neural nets, well, he might try that too. Of course there's more to successful fundraising than numeric gymnastics. Data findings must be translated into executable creative strategies. So it helps that Gord can also draw upon past editorial skills to mold your data findings into compelling creative. As an editor with McGraw Hill, Gord was responsible for project managing book production from market research to final printed book. This process involved ascertaining the needs of the market and then guiding creative teams to prepare visually stunning print materials that stand out in the marketplace…the same process often followed by your direct marketing appeals. We know, it's a bit of an odd left-brain, right-brain, data/creative mix, but in fact, this is a mix that groups like Parkinson Society Canada, William Osler Health Centre and the Canadian Mental Health Association now appreciate.

Ushnish Sengupta, Co-Founder & Research Director, Rotman NeXus

Ushnish Sengupta brings more than ten years of experience in public and private sector strategy and operations management to Rotman Nexus. He graduated as an Industrial Engineer from the University of Toronto and has worked for a wide variety of organizations, including federal crown corporations and high-tech startups. Ushnish is the founder and past president of the Net Impact chapter at the Rotman School of Management, an organization whose goals include applying MBA skills to social issues, and also co-founder and Research Director of Rotman NeXus, a non-profit consulting group specializing in Linking Business Minds and Social Missions. Ushnish's research interests include determining Social Returns on Investment for Nonprofit organizations.

Alex Sirota, Founder, NewPath

Alex Sirota is the Founder of NewPath Network, conceived in 2001 when he started his management consulting company that serviced the non-profit sector. His experience is mainly in the development of software and strategies designed to take advantage of technology in non-profit and public sector settings. He has worked as a software developer at Apple Computer Inc. in California and Texas as well as a product manager at two successful technology companies in Toronto. Alex assists organizations to take advantage of information technology on a strategic. He has a keen understanding of how important managing scope, resources and timeline is to an IT project in an NPO or Government setting. He is well versed in a variety of technology applications that are readily available off-the-shelf as well as open-source solutions. Since founding NewPath, he has worked with Junior Achievement of Canada, Canadian Cancer Society and United Way of Greater Toronto in a variety of project management lead capacities. Most recently Alex has been busy with several large software business transformation projects, practicing agile project management techniques and most importantly raising his 5-year old son, Aaron.

Phillip Smith, Principal, Community Bandwidth

Phillip is the "Simplifier of Technology" at Community Bandwidth, a Canadian consulting practice that works with progressive non-profits to explore the thoughtful use of technology toward creating a more just and sustainable society. In that role, he works with leading social justice and community organizations to examine the ways Internet technology can build online relationships, support community engagement, facilitate group collaboration, and create successful online campaigns. His recent clients include: Amnesty International, Greenpeace, the National Peace Corp Association, Grist magazine, This magazine, and New Internationalist.

Tonya Surman, Founder, Centre for Social Innovation

Tonya Surman has been helping social mission groups to collaborate, innovate and make money for over 15 years. Tonya is the founding executive director of the Centre for Social Innovation. She is also the founding Partnership Director for the Canadian Partnership for Children's Health and Environment. Tonya has operated and managed social enterprises for over ten years.

Rami Tabbah, Principal, Ergonaute Consulting / Chief Organizing Officer, NewPath

Rami Tabbah is the principal of Ergonaute Consulting and the chief organizing officer of NewPath. He is a usability expert and a product manager who has spent the majority of his 15 years career defining successful products that are easy to use for end users and that bring value to businesses. He is exceptionally skilled in taking a product from an idea to a reality, managing the product life cycle, the business case, defining its requirements, designing its User Interface and ensuring its usability and acceptance. He is also skilled in reengineering an existing product, transforming it to an efficient and successful product. Before starting Ergonaute Consulting, Rami worked for companies such as Nortel Networks and Fidelity Investment. He holds a Bachelor degree in Electrical Engineering, and a Masters degree of Engineering in Human Computer Interaction with a focus on task analysis modeling techniques and methodologies. He currently lectures a number of courses and workshops at Polytechnique of Montreal, Schulich School of Business and Seneca College. He is also the communication chair of TORCHI (Toronto Computer Human Interaction society) and he sits on an advisory board at Humber College.

Bill Young, Founder, Social Capital Partners

Prior to founding SCP in 2001, Bill spent twenty years in the private sector leading high growth, entrepreneurial organizations. He was CEO of Hamilton Computers, a publicly traded computer company, which grew from $15 million in revenue to $250 million under his leadership and was sold to GE Capital. Bill was also the CEO and subsequently the Chairman of Optel Communications Corp (later Axxent), which was a leading CLEC (competitive local exchange carrier) in the Canadian telecommunications market when he left in 2000. Bill began his career as a Chartered Accountant with Ernst & Young and holds an Honours BA from the University of Toronto and an MBA from the Harvard Business School. He currently sits on the Boards of Inner City Renovations Limited, the Bay Area Health Trust, Renaissance Montreal, Maxxam Analytics Inc., Vartana, and a number of Advisory Boards.