

Tim Duprey, under the supervision of Angelinne Seguinte and Judith Jayasuriya with the partnership of CanU has written this case solely for the 2024 IG Wealth Management Prepared Case Competition. The author has no intention to comment on or evaluate the handling of managerial decisions within CanU. Photocopying transmitting, distributing or reproduction this case in any form or by any means is strictly prohibited.

CanU: Finding an Innovative Way Forward

Understanding CanU

Roger Berrington, coordinator of CanU sits at his workstation, preparing for the organization's first planning session. The exercise must produce not only new long-term goals meant to enhance and expand the organization. but also identify more immediate fundraising initiatives. CanU has been remarkably successful in meeting the needs of the children and families that it serves. However, it is at a point in its growth where it needs larger more sustainable funding and new and different partners to help meet the needs of even more children.

Roger has asked your small group to help him set the stage with the planning exercise. But first he wants to explain what CanU does, how it operates and what he sees are its challenges. Some of you may already know about their work or have fellow students that volunteer for CanU.

CanU works virtually, in-school, after-school, on-campus and in the community, serving hundreds of young people and volunteers from seventy schools and post-secondary institutions in Manitoba. CanU addresses systemic social issues by providing school children with comprehensive experiences embedding four positive psychological capacities: *hope, confidence, resiliency, and optimism*:

- by connecting community institutions in collectively transformative ways
- by initiating partnerships between these groups
- by offering mentorship, learning and leadership experiences to underserved youth with immense potential and
- by helping these young people build confidence in themselves and hope for their future.

This year CanU is working with 580 children and youth from priority neighbourhoods and demographics with a dignity-reinforcing approach and is committed to inspiring hope and confidence in the leaders of

tomorrow. The group of children represents fifty-eight different countries of origin. 60% of these children speak multiple languages and 25% self-identify as Indigenous.

CanU's model also provides post-secondary students with opportunities to hone their personal and professional learning and leadership skills in a community service context by designing, leading, and mentoring in learning experiences in their chosen fields of studies. Thus, two worlds, often separate and distinct, are simultaneously brought together to reduce stigma and fear, challenge poorly informed and negative stereotypes and promote truth and reconciliation. This essential element of CanU broadens the university students' understanding of other socioeconomic groups. The program also helps build partnerships between these students and the children and their families and communities and between these groups and the organizations who support CanU. Over 400 university students are currently involved with CanU, with 200+ acting as mentors.

CanU's Programs

CanU offers a variety of programming for Winnipeg youth from grades 5-12 on the University of Manitoba campus in 4 – 5 week segments each year, Fall, Winter, Spring and Summer. These programs vary in their focus and age group, but the on-campus CanU experience can be divided into these pathways:

1. Explore Pathway – for grade 5 & 6 participants, weekly mentorship-supported learning experience happens on Tuesdays and Wednesdays in the fall and winter terms from 4 – 7 pm which includes two introductory learning experiences (modeled after the concept of U1, with a sampling of a wide variety of university options and opportunities) designed and facilitated by university student volunteers in their chosen field of study - and a dinner meal that is either made by the participants (nutrition programs) or provided by university partners (e.g. Daily Bread Café, St. Paul's College or Pembina Hall) or outside catering options. Bus transportation is provided in partnership with several school divisions and several schools on each of the 3-4 bus routes.
2. Discover and Aspire Pathways – At this stage participants begin to identify and select academic areas of interest.
 - Discover Pathway, an introduction allowing grade 7-8 participants to explore options
 - Aspire Pathway assists those in grades 9 – 10 begin to select majors and facilities they wish to pursue.

This involves a weekly mentorship-supported learning experience which happens on Thursdays in the fall and winter terms on both the Fort Garry and Bannatyne campuses. These learning experiences are 2-hour blocks and progressive in nature over the 5 weeks. Dinner is first then a 2-hour “academy” which is more advanced and considers the interests and aptitudes of the students. There are a wide variety of academies that once again provide university students with unique learning and leadership development opportunities in designing and facilitating these experiences. These experiences range from natural sciences to law to nutrition to engineering (robotics), art and highly creative academies designed by Bachelor of Education students.

3. Rise+ Pathway – Rise+ is a learning and leadership program for high school students, and for mentors and partners that will help prepare them for their unique futures. The Rise+ initiatives intentionally include both friends of CanU youth as fellow learners and CanU Rise alumni who will serve as mentors, facilitators, and helpers.

Rise + builds on CanU learning platforms for younger CanU participants – Explore and Aspire and focuses on 4 key personal, learning and leadership pathways in an advanced way.

- a. Learning & Academics
- b. Health & Wellness
- c. Leadership & Service
- d. Creativity & Expression

Additionally, Rise+ focuses on customizing learning and leadership (service) experiences for each youth. CanU facilitates connection with volunteer experiences and public speaking opportunities as well as research projects and internships.

Rise+ CanU helps participants plan for their academic and career futures in a variety of ways:

- The spring term in CanU varies from year to year and gives CanU the opportunity to pilot innovative programs with new partners and to collaborate with schools and participants who would benefit from additional opportunities.
- The summer term is currently a Summer Leadership program for junior high youth that provides additional summer learning and leadership input.
- CanU plans to expand the summer programs to include a one-week day camp for grade 5 & 6 participants as well as a customized summer leadership program for Rise+ high school students.

Current Annual Events

As well, CanU offers key annual events that build on the regular programs and fundraise for programs and scholarships:

- CanU Family Festival (May) - a learning fair featuring CanU's learning experiences and partners for participants, families, educators, volunteers, supporters, partners etc.
- CanU Family of Challenges (September) - an annual peer-to-peer fundraising event to raise funds for CanU's scholarships. These Challenges are, to this point, endurance events based on the original challenge - The Mantario Trail Challenge - hiking Canada's third most difficult trail (65 km) in less than 24 hours.
- CanU Imagine Stories Gala (November) - an annual fundraising event to raise awareness and funds for CanU programming featuring the stories of participants at the Canadian Museum for Human Rights.

CanU's Operational Philosophy

CanU programs attempt to draw out positive psychological capacities focused on leadership development concentrating on people, resources, ideas, and efforts – between families, children,

volunteers, community institutions and where sponsors. They prefer to use a story-based and story-telling approach to communication, marketing, and fundraising.

CanU prefers to use decentralized organizational efforts through partners and volunteers; initiatives that are agile and responsive to needs and opportunities presented allowing participants to see possibilities and seize opportunities. CanU has been successful using efficient and effective innovative approaches to maximize charitable impact, for example CanU does not own or rent anything. Partners supply key inputs. CanU has an annual operating budget of around \$1.0 million funded from donations, gifts, and grants. Operationally their programs have a volunteer-based leadership structure with a small staff team focusing on coordinating partners, volunteers, and programs.

CanU promotes a multi layered approach which is a hallmark of their work. They use a partnership-based process that targets “Mutual Beneficialism” so that all stakeholders receive benefit from their involvement ensuring layers of benefit from each initiative. The staff feel they have succeeded when multiple good things happen within a particular effort or initiative. Roger feels CanU needs to pivot from this base of success and explore new avenues; new funding, innovative programs and new sponsors while staying focused on a layered mutual benefit.

Needed Increased Funding

In addition to in-kind donations, CanU is funded through grants, with modest fundraising events and just a handful of regular donors as CanU is a registered charity. Federal government funding is limited to summer jobs grants. Manitoba Government t funding has included Green Team and more recently a nutrition grant for after-school and summer programs. Currently it receives funding from: Jumpstart, Co-Op, Second Harvest, Canada Post and various Endowment funds. The CanU staff have some ideas on how to increase revenue but are unsure where to focus their fundraising energies to achieve maximum benefit at minimum cost. CanU has considered concepts like a monthly donor campaign, a revenue producing in-school speaker and workshop series and a structure to facilitate decentralized fundraising by friends and allies.

Manitoba has several large and many medium sized charity funds and foundations that provide grant funding to the health, education, and social service sector. CanU has had success in attracting grants from some of these organizations such as The Winnipeg Foundation, RBC Foundation, Lount Family Foundation and Rogers Communications. Total annual grant funding has varied from year to year averaging around \$300,000 per year with one exceptional year of \$500,000. The variability demonstrates the short-term nature of this type of funding.

CanU staff feel they need to do a better job with long-term enduring funding, but they are not sure how to successfully establish and maintain this type of funding. Who do they approach? With what message? How can they find Mutual Benefit with these organizations?

Roger feels that hiring a professional fundraiser may be an obvious solution but that would not fit with CanU’s operational philosophy plus CanU would need to capture these costs from the grant funding. And there is always a risk the funds raised will not cover the cost of fundraising. A different approach needs to be considered.

Required Additional Corporate Sponsorships and Partnerships

Sponsorship is important for the program. It draws needed funds and demonstrates broad community support. CanU wants new sponsorships that will espouse CanU's mission and benefit the children and their families, the volunteers, the communities and ideally the sponsor's business and mission. Identifying new and innovative sponsorship projects is part of this planning exercise.

By way of example CanU has introduced a new sponsored program in collaboration with the Royal Bank which offers participating children training in what we would call "personal financial management." Lessons help the students understand banking, saving, etc. and expose the students and their families to the Royal Bank services, Mutual benefit for the children, their families, and the Royal Bank.

Also, there may be opportunities to expand partnerships with various industry programs and other education providers, other post-secondary education institutions for example. Expanding off the University of Manitoba campus has been discussed by CanU and may be highly effective. The planning group wants to consider viable options; where should CanU look for partnerships and how could these dovetail with the current operation and process? Are there possible multi-level benefits waiting to be developed by CanU?

As well Roger wonders: Is the name CanU a possible impediment in attracting non-university organizations to participate? Or does our name dissuade children who are not interested in university for their post-secondary schooling?

CanU has been successful in meeting its mission Roger believes but it is now at a key point in its development. Participating schools report that there's strong demand for CanU's core programs, greater than CanU can currently manage. However, CanU's finances cannot support more programs, and the existing group of university subject areas cannot manage more youth under the current program model. So, the problem is three-fold; more demand than can be serviced by CanU, insufficient funds to expand core programming and existing university subject areas have reached their capacity.

Roger is looking for innovative ideas on how CanU can sustain and continue to grow. He wants the planning group to open their minds to think "outside the box" to build on the successes they have achieved. He is asking you to give him your best thoughts on these issues and make a presentation of your analysis to the planning group.

Roger is hoping to hear your ideas for both immediate fundraising and long-term sustaining sponsorships and partnerships. He wants to hear your fundraising ideas and how you think CanU should approach the agencies, how CanU should frame and present the "ask" and to best meet both CanU's and the funders mandates. On the partnership/sponsorship side it will be important to demonstrate how your recommendation could be mutually beneficial and how your concept could be "sold" to the prospective organization. Roger is hoping you can provide a few well-thought-out proposals for the committee to consider. A proposed Plan of Action including timeframes would be appreciated.

Please consult the competition rules provided to your team. You may (and should) conduct outside research and use other sources of information beyond those provided in the case. However, teams are strictly prohibited from contacting or speaking with the CanU staff, funders or partners directly.

Appendix: Notable Websites with Additional CanU Information

- CanU Website: <https://canucanada.org/>
- CRA Quick View CanU Canada: <https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyRprtngPrd?q.srchNmFltr=CanU+canada&q.stts=0007&selectedCharityBn=847438504RR0001&dsrdPg=1>
- CanU YouTube: <https://www.youtube.com/user/CANUcanada>
- CanU Facebook: <https://m.facebook.com/CanuCanada/>
- CanU Instagram: https://www.instagram.com/canu_canada/?hl=en
- CharityData: <https://www.charitydata.ca/charity/canu-canada/847438504RR0001/>