

Why: Our Communities Are Struggling

- Communities around the world are experiencing exponential growth of societal pressures such as housing affordability, food insecurity, mental health challenges, & wealth inequities
- As pressures and challenges grow, we can see how the current trajectory extends if we don't collectively move from treating socio-economic symptoms, to transforming root causes
- The Okanagan Circular Society (OCS) believes a different, systemic approach, is needed to change the trajectory of the Okanagan – one that rebuilds community wealth and well-being

Okanagan Circular Society (OCS) - Community Enterprise

- The OCS Community enterprise utilizes the strengths of the current system, and infuses it with proven holistic approaches and practices
 - The result is a scalable socio-economic system that has the capacity to address the complex and interdependent challenges facing our communities
- As an integrated self-governing Community Enterprise, the OCS begins to rebuild community wealth (it is currently out of balance with private wealth) and foster larger psychological well-being
- As a form of economic development, Community Wealth Building utilizes localized investment capital to acquire and grow businesses
 - The OCS looks for existing businesses in the community that have untapped potential to serve a broader purpose and foster a circular economy
- Community Wealth Building includes gifting of assets and businesses into community ownership
 - Note: Community Wealth Building reflects aspects of the West Coast Indigenous socio-economic Potlatch which is based on gifting to redistribute wealth
- Once self-sustaining, excess wealth is reinvested back into community initiatives
- As a result of significant grassroots community investment, the OCS has built a solid foundation over the last two years
- The OCS Community Enterprise model is composed of 4 key elements, each proven on scale:
 1. Hybrid Community / Private Ownership:
 - The OCS is a not-for-profit that acquires and grows for-profit businesses with local investment capital (at social returns) to rebuild community wealth
 2. Wholeness Practices:
 - There is incredible potential within each individual, and circular wholeness practices begin to rebuild the creative capacities required for the integration of head and heart within larger groups (ie. individual and collective psychological well-being)
 3. Self-Governance:
 - Distributed leadership, with decentralized power, where robust practices and procedures utilize consent decision-making (**not consensus) to enable self-organization, evidence-based decision-making, and high levels of trust
 4. Bio-regional Approach:
 - While societal pressures are global, solutions are developed locally – hence, why the OCS takes a bioregional approach to rebuilding local community wealth and well-being, which can then scale to global community wealth and well-being

Vision of Possibility

- The comprehensive self-governing OCS Community Enterprise creates transformative opportunities across food resilience, housing, transportation, energy, health care, etc by integrating proven and successful approaches across the 4P's of People, Planet, Purpose, & Prosperity
- The OCS advances the circular economy, currently focused on industrial approaches, by integrating circular economy ventures into a holistic and comprehensive Community Enterprise
- Once proven in the Okanagan, the Community Enterprise model can be replicated and scaled to other communities and bioregions across Canada and beyond
- These can be then be woven together into a global community economy with the socio-economic capacities to co-create a truly flourishing future

Value to Donors

- Many funders are feeling donor fatigue – often they have invested time and money into areas of community that are important to them, only to see the great work of many people and organizations being dwarfed by ever growing pressures
- Current work is important, and needs to continue - however, without community systems that rebuild vibrant roots, biodiversity, and economic nutrients - our societal pressures will only grow
- OCS funders are at the forefront of economic transformation, and gain valuable skills in wholeness practices and self-governance
- OCS funders connect meaningfully with others who share a passion for community well-being
- OCS funders leave a legacy of rebuilding the vibrant roots of community so that our children and grandchildren can enjoy a flourishing future

Background & Initial Foci

- The OCS has been championed by the Okanagan coLab, an entrepreneurial community center with 11 years of leadership across tech, social enterprise, and arts / culture
- In 2020, coLab hosted a 6-week Design Lab and invited a diverse group of community experts to co-create the OCS framework (for more info, see our Blueprint for Economic Transformation)
- In 2021, coLab and the OCS hosted an inclusive 5-series Community Dialogue to hear the challenges, opportunities, and areas of focus from the larger community
 - Culminated in presentations on transformative community ventures (with focus on food resilience / circular economy) and the development of a comprehensive business plan
- The OCS has three initial focus areas related to Phase 2 of the OCS Road Map (see Pg 4)
 - **Corporate Development**
 - **Community Wealth Building**
 - **Food Resilience Venture**

Focus #1: Corporate Development

- The OCS requires internal corporate development, including:
 - Completion of full legal and tax for the not-for-profit w/ for-profit hold co
 - Internal systems, practices, and holistic measurements
 - Establish co-creation partnerships, including charities for gifting of assets

- Investment pathways and sources of community capital
- Additionally, coLab is being integrated into the OCS not-for-profit to continue its growth
 - The integration means coLab will serve as the operations hub for the OCS
 - As a thriving co-working & community center, coLab will continue to be a place of inclusivity and diversity across race, gender, and sexual orientation
 - coLab will build on it's proven approach to incubating/supporting business innovation, while actively building integrated partnerships with Accelerate Okanagan and Purppl
- **Outcome:** Robust corporate framework that supports future phases and growth

Focus #2: Community Wealth Building

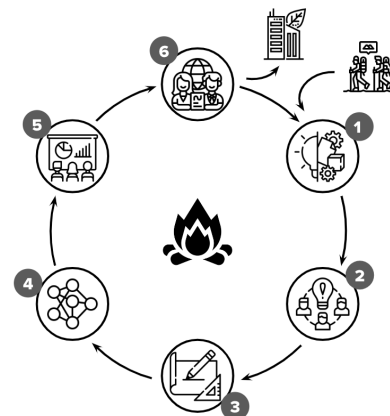
- Identify and conduct due diligence to establish a portfolio of viable businesses for acquisition
 - Viable opportunities: Any business that doesn't do direct harm and has untapped potential to address community challenges as part of a circular economy / society
- Validate compatibility and opportunity for development
- Prioritize backlog of viable businesses with investment capital requirements
- **Outcome:** Identify, validate, and build a backlog of viable business

Focus #3: Food Resilience Venture (Initial Area of Community Co-creation)

- **Challenge:** Currently the Okanagan food system is fragile (this is common across Canada)
 - Local farmers and food supply companies are struggling due to economic conditions
 - Many have, or are, looking to sell or close – with this trend, the local food system is rapidly becoming more fragile
 - The Okanagan only has 38% food self-sufficiency, and therefore relies on a global food system that is susceptible to instability of market factors, pandemics, floods, and fires
- The OCS Community Enterprise unlocks a scalable pathway to build a resilient localized food system beyond the limitations of government initiatives and private enterprises
- The OCS will utilize its Design Lab methodology to guide the co-creation of the community venture
- **Outcome:** Scalable enterprise approach to begin achieving 70% self-sufficiency for Okanagan region, and to ensure healthy food for all residents

Venture Design Lab Co-Creation:

- Scoping:** Discussions with key people to validate and flesh out further details of the hybrid community / private owned ventures
- Circle Design (Part 1):** Invite diverse experts into 2-3 circles to build relations, explore viability, and co-create further iterations
- Refinement:** Further development, including: proforma, financing, pricing, technical details, other partners, and corporate structure.
- Circle Design (Part 2):** Return for 2-3 additional circles to validate & refine current design, while helping to identify community resources
- Presentation:** Community presentation to tap collective intelligence for further input, validation, & wisdom gathering
Decision point: Continue , Park it ?, or Recycle it X
- Co-created Business Plan:** Acquisition, growth, & team plan (including budget and requested community resources)



Core OCS coLab Team

The core team has extensive experience across business, academic, community, and sustainability sectors

Additionally, there is a group of grassroots leaders who are ready to mobilize larger initiatives once the OCS Community Enterprise is fully operational (Phase 3+)

Core Team:

Shane Lapp - Holistic Systems

Barri Harris - Corporate Leadership

Greta Reid - Connection Catalyst

David Jenkins - Sustainability Champion

Shane Austin - Community Development

Brandon Farr - Business Development

Road Map Phases & Community Co-creation

- Co-creating holistic socio-economic systems invites all of our responsibility
- The OCS has a solid foundation built, and is ready to develop the larger Community Enterprise framework for rebuilding community wealth and well-being

Ph 1: Foundation	Ph 2: Framework	Ph 3: Growth & Refinement	Ph 4: Community Development	Ph 5: Reinvestment
COMPLETE (Funded by grassroots community)	<ul style="list-style-type: none"> • Corporate Development • Backlog of Businesses • Food Resilience Venture Design Lab 	<ul style="list-style-type: none"> • Investment Capital • Business Acquisitions • Food Co Growth 	<ul style="list-style-type: none"> • Additional Community Ventures • Replicate Model to other Regions 	<ul style="list-style-type: none"> • Financially Self-sustaining • Reinvest Co-created Wealth with Community

Request for Funding & Co-creation

- To realize the OCS potential, we are requesting not-for-profit funding for Phase 2 (\$100k @ ~3 months) and Phase 3 (\$900k @ ~9 months)
 - Note 1: Traditional economic development funding to be tapped for Phases 4+
 - Note 2: Phase 3 has opportunities for investment capital (with social returns)
- The OCS team invites expertise to help build the scalable Community Enterprise

For More Information

- Visit our website (link below)
- Contact Shane Lapp (OCS Lead):
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