



# COMMUNITY WEALTH BUILDING

**Opportunity Overview:**  
OCS Community Enterprise

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**Prepared by**

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OKANAGAN  
CIRCULAR  
SOCIETY



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**As community innovators, we have the power to co-create new community systems that address root causes of growing societal challenges. Together, we can accelerate the development of communities where everyone's needs are met, and where people and the environment flourish in harmony, building a legacy that our children and grandchildren will be proud to inherit.**



# OVERVIEW



## PURPOSE

Generating Community Wealth & Wellbeing



## VISION

A flourishing future for the Okanagan and beyond

<b>The Need</b>	A new approach is needed that can address and transform growing socio-economic pressures.
<b>The Opportunity</b>	A transformative social and economic platform for community to collaboratively develop new solutions to growing societal challenges.
<b>The Offering</b>	The Okanagan Circular Society (OCS) Community Enterprise (a Federal Not-For-Profit Co.) is composed of: <ul style="list-style-type: none"><li>• Framework for Collaboration</li><li>• Centre for Community Innovation</li><li>• Community Wealth Building</li></ul>
<b>Community Wealth Building</b>	By integrating the best of siloed non/for-profits, charities, foundations, and governmental organizations into hybrid collaborative models we can begin to rebuild community wealth.
<b>The Foundation</b>	The OCS Community Enterprise is the result of 3+ years of research and development on Community Innovation, and is built on coLab's 11 year history as a grassroots entrepreneurial community centre.
<b>The Leadership</b>	The OCS / coLab team has in-depth experience in community development, corporate leadership, and guiding innovation.

# ISSUE: GROWING SOCIETAL CHALLENGES

The Central Okanagan has long had the reputation as “A playground for the rich; a prison for the poor.” While the region has made progress in addressing the inequities, the world is changing rapidly, and it is important to address the growing socio-economic pressures facing our communities.

The following are some of the most pressing challenges. Others such as infrastructure needs, inflation, political infighting, siloing, elitism, and growing debt add to the complexity.

## WEALTH INEQUALITY

Growing wealth inequality and poverty are affecting a wider demographic, leading to a lack of opportunities and social mobility. This creates social division, affects health outcomes, and increases crime rates.

## HOUSING INSECURITY

The lack of affordable housing and increasing homelessness contribute to a housing crisis, contributing to mental health issues, family breakdown, and strain on social services.

## MENTAL HEALTH

Mental health issues are on the rise, creating challenges for individuals, families, and communities. These challenges can lead to social isolation, increased healthcare costs, and reduced economic productivity.

## FOOD INSECURITY

Food insecurity is a growing concern, with increasing numbers of individuals and families struggling to access healthy and affordable food. This can lead to negative health outcomes and economic disadvantage.

## CULTURAL

Despite efforts, cultural inclusion remains a challenge, leading to intercultural misunderstandings and lack of respect, hindering social cohesion and community-building efforts.

## ECOLOGICAL STRESS

Stressed natural ecosystems, declining biodiversity, and increasing threats to community resilience from climate change result in decreased quality of life, economic impacts, and social disruption.

**Hierarchical and siloed community systems can lead to limited resources for governments, competition for funding among non-profits, and elitist networks that prioritize political interests over the long-term wellbeing of the community.**



# NEED: COMMUNITY INNOVATION

*“You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete.” –Buckminster Fuller*

## SOCIAL INNOVATION & IMPACT

Social innovation is crucial because it drives positive change in communities with measurable and impactful results. However, it is important to recognize that social innovation and impact do not address underlying economic systems that contribute to the growing societal challenges we face.

## ECONOMIC INNOVATION

To fully address these challenges, we also need economic innovation that focuses on creating new economic models for wealth creation, ownership, and governance that prioritize community resilience, regenerative practices, and collaboration. By combining social and economic innovation, we can work towards creating a more just and sustainable future for all.

## TRANSFORMATIVE COMMUNITY INNOVATIONS ARE NEEDED

Community innovation is the combination of social and economic innovation that enables us to rethink the fundamental structures of our communities so that we can begin to address root causes of socio-economic challenges.

Leading research\* confirms the following four Community Innovations are needed for scalable solutions to local and planetary challenges (see pages 6 & 7 for more details):

**Community innovation is the combination of social and economic innovation.**



### 1. GOVERNANCE

Decentralized power and decision-making



### 2. CULTURE

Practices that foster diversity and belonging



### 3. ENTREPRENEURSHIP

Community systems centric business approaches



### 4. OWNERSHIP & CAPITAL

Community Wealth Building approaches

#### \*LEADING RESEARCH

- [Investing in Systems Innovations, 2022](#)
- [Design Foundations for Systems Capital, 2022](#)
- [En'owkin: What it means for Sustainable Community](#)

# WHAT: OCS COMMUNITY ENTERPRISE

The Okanagan Circular Society (OCS) Community Enterprise is composed of the following three aspects. See preliminary Activation Plans on page 13.

## 1. FRAMEWORK FOR COLLABORATION

The OCS is a Federal Not-For-Profit Co. that serves as a Framework For Collaboration and integrates the four Community Innovations. The OCS is acquiring and merging the coLab to be a Centre for Community Innovation.

## 2. CENTRE FOR COMMUNITY INNOVATION

coLab is an entrepreneurial community centre / coworking space with over a decade of grassroots community leadership. coLab provides a solid foundation for the Centre for Community Innovation and is the operations centre for the OCS Community Enterprise.

coLab maintains its current offerings, while expanding its capacities for: 1) communicating Community Innovation, 2) hosting community dialogue/conversations, and 3) hosting community workshops and venture design labs.

## 3. COMMUNITY WEALTH BUILDING

Community ownership within the OCS Community Enterprise offers two key values. Firstly, it unlocks pathways for integrated capital, combining equity, debt, philanthropic, and government funding, to establish a scalable pathway for Community Wealth Building. The "Exit to Community" approach transitions businesses and assets to community ownership, fostering sustainable and inclusive economic development.

Secondly, community-owned businesses within the Community Enterprise serve as catalysts for scalable systems change. By retaining community ownership, these businesses drive transformative economic and social initiatives, addressing systemic challenges and creating transformative impacts.



**"New systems always start with small seeds, visible attractors, containing the potential to spawn entirely new systems. Those visible attractors pull investors, collaborators, government, innovators and entrepreneurs to explore the space they have opened up."**

'Investing in Systems Innovation' 2022

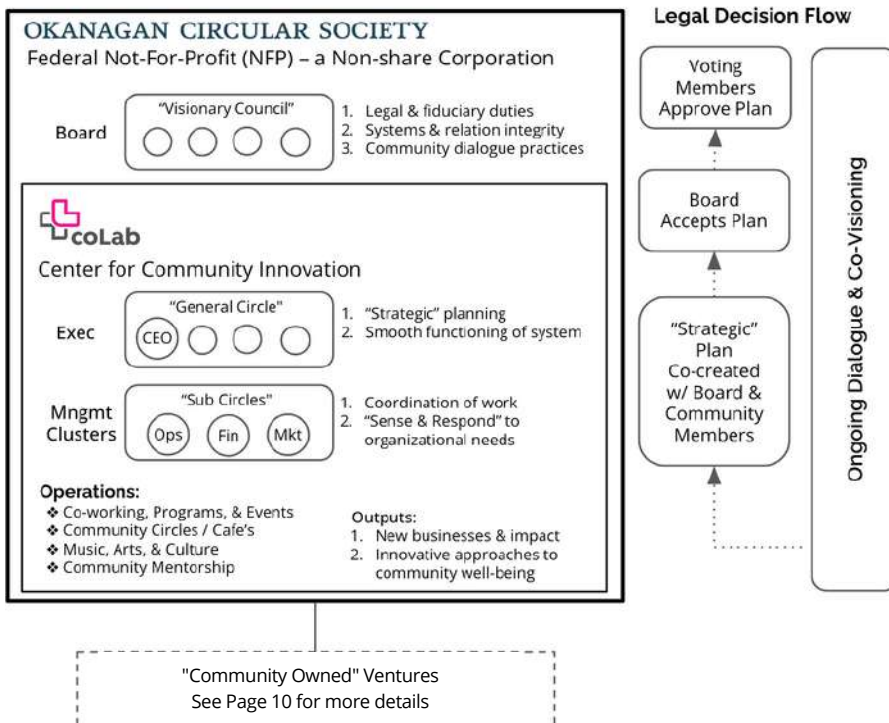
# FRAMEWORK OVERVIEW

The OCS Community Enterprise framework is the result of over three years of community research and development. Once operational, the OCS Framework for Collaboration provides the infrastructure for alignment of interests between siloed organizations and sectors.

The OCS Framework for Collaboration is housed within the Not-For-Profit Co., which also maintains and oversees the 4 Community Innovations (see next two pages) for the whole Community Enterprise framework.

The below schematic shows the legal orientation of OCS and coLab, the Board ("Visionary Council") and voting member relationship, and the integrated community dialogue process that guides the OCS's emergent strategy.

The OCS Community Enterprise is designed to become financially self-sustaining, with excess profits being reinvested to fund further community wealth and wellbeing initiatives. Once proven, the Community Enterprise framework can be replicated and scaled within other regions, creating the possibility of a meta framework that weaves them together for global transformative action.



## OCS Board & Membership

OCS Board & Voting Members hold the integrity of the self-governing Community Enterprise. Eligibility for these roles include demonstrated commitment to community, experience with self-governance, and active participation in community circles and conversation's.

## coLab General Membership

General (non-legal) community memberships are for coworking, events, and overall participation within the OCS coLab community enterprise.

# 4 COMMUNITY INNOVATIONS



## 1. GOVERNANCE: SOCIOCRACY ~ “MANY VOICES, ONE SONG”

Traditional organizational structures, with hierarchical corporate governance and decision-making models are not “fit-for-purpose” for the OCS Community Enterprise.

The OCS uses Sociocracy, a proven governance and organizational model, to distribute power and ensure transparency with consent based decision-making (also called ‘consultative decision-making’).

Sociocracy provides clear processes to dynamically change purpose driven roles with evidence-based and integrative decision-making processes. The OCS has adopted Sociocratic governance within its bylaws.

Sociocracy is used by thousands of organizations and is based on the following three principles:

### CIRCLES AND CIRCLE PRACTICES

Circles are semi-autonomous groups of members working towards common purpose and vision.

### DOUBLE LINKING

Effective and transparent information flow between linked circles is achieved by having two people who are full members of both circles.

### CONSENT DECISION-MAKING

Policy decisions are made when there are no remaining objections from within a circle. Objections are welcomed but are based on how a proposal would be contrary to achieving the purpose of circles, not on personal preference.

*For more information:*



Sociocracy For All



HOLAcracy



## 2. CULTURE: THE POWER OF CIRCLE

Culture is shaped by organizational and community structures. Hierarchical structures struggle to accommodate the complexity of Diversity, Equity, and Inclusion (DEI).

Circular practices and philosophies foster diversity of perspectives, soulful belonging, and cultural inclusion. Through the integration of restorative justice, Non-Violent Communication practices, and conflict facilitation processes, circular environments also promote individual and collective well-being.

The coLab has a long history of being a community space that celebrates diversity, art, music, and inclusive cultural events. It focuses on facilitating spaces for intercultural exchange that go beyond performative DEI, while promoting open and responsible speech.

In a world that is increasingly divided, resilient organizations and communities can be developed through Sociocratic governance and circular cultures that foster inclusive dialogue.



# 4 COMMUNITY INNOVATIONS



## 3. ENTREPRENEURSHIP: FROM SILOED TO COMMUNITY

Community entrepreneurship invites us to look deeply at socio-economic structures that are root causes of growing societal pressures.

Where social entrepreneurship is focused on a single organization, community entrepreneurship focuses on creating a value generating ecosystem with alignment of parts across community. Community entrepreneurship builds off, and is supportive of social entrepreneurship.

For example, 'impact' metrics and the United Nations Sustainable Development Goals (SDGs) provide a solid foundation for measuring community prosperity (People, Purpose, Planet, & Profits) that is in balance with our ecosystems.

coLab actively supports all types of entrepreneurs through a variety of organic and structured offerings, with countless stories of success within their caring approach.



## 4. OWNERSHIP & CAPITAL: COMMUNITY WEALTH BUILDING

By integrating the best of siloed non/for-profits, charities, foundations, and governmental organizations into hybrid collaborative models we can begin to rebuild community wealth. These models, similar to cooperatives but without constraints, unlock new pathways for integrated capital (equity, debt, philanthropic, and government).

Through strategies such as "Exit to Community," Community Wealth Building approaches seek to retain wealth and ownership within collaboratively governed models, such as the OCS Community Enterprise.

*For more information:*

- [Community Wealth Building - Democracy Collaborative](#)
- [Exit to Community - A Community Primer](#)

**"There will be no long term solutions at scale to the environmental and social challenges we face without the mobilisation of financial capital behind new energy, transport, food, work, education, health and housing systems."**

*'Investing in Systems Innovation' 2022*

# CENTRE FOR COMMUNITY INNOVATION

coLab is a place to reimagine how community lives, works, and plays. It is built around five core values: Community, Collaboration, Creativity, Purposefulness, and Celebration.

## GRASSROOTS LEADERSHIP

coLab is more than just a coworking space – it's a dynamic community that empowers individuals to learn, grow, and create meaningful impact.

## PUTTING COMMUNITY FIRST

Founded in 2011, coLab has over a decade of trusted relationships across the community, a proven track record, experienced team, and leadership in community development. coLab's founding vision of co-creating a new economy of community and collaboration was the catalyst of the OCS's Community Enterprise.

## INTEGRATIVE LEADERSHIP

coLab is an integrator that brings together the best and brightest minds of community, along with resources to transform systemic challenges from whole perspectives.

## COMMUNITY IMPACT

- 500+** members and alumni who have benefited from coLab
- 300+** companies supported in revenue generation and job creation
- 5,000** contacts reached regularly through newsletters, meetups, and socials
- 100s** new immigrants welcomed and helped to integrate into community
- 1,000s** hrs of skill development programs and events for business and community

## OFFERINGS & PROGRAMS

coLab offers a mix of entrepreneurial programs and community events inspired by leading social and economic innovation organizations, including Toronto's Centre for Social Innovation and Vancouver's 312 Main.



*"The first day walking into coLab (2016) was the beginning of a whole new world. Coworking changed my life. Had I known where the power of a collaborative workspace would have taken my business in just a few short months, I would have jumped on this train years ago."*

**Tasha DaSilva - West Kelowna Councillor**



*"True multiculturalism will only be realized in the spaces that accommodate deeper intercultural exchange. coLab has been that space for us in Kelowna. Real non-performative inclusivity with an openness to explore diverse concepts and ideas."*

**Lady Dia & Trophy Ewila - Kinfolk Nation**



*"Since working at the coLab (2013) I've started an animation studio which now employees 150 people. Some of those people I met during my time at coLab."*

**Todd Ramsay - Yeti Farm**



Women in Tech conference panel discussion



Kinfolk live music



Community Animators

**TEAM COLAB**



Design Jam for social inclusion at UBC Okanagan



Co-creating with entrepreneurs



OGO Carshare Launch



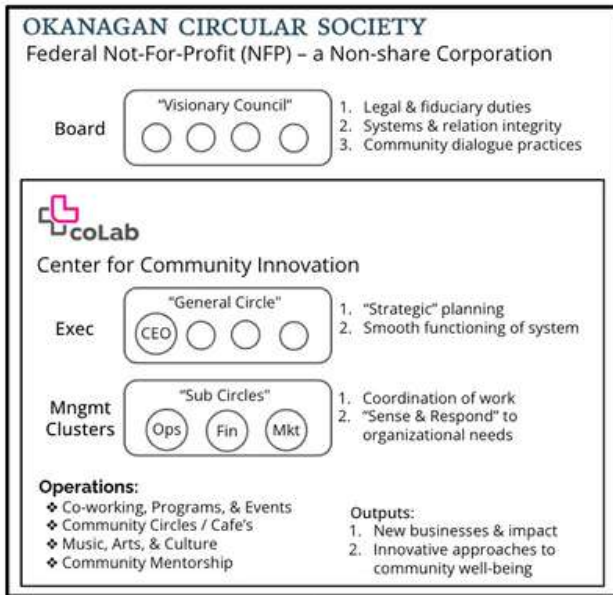
Community Socials



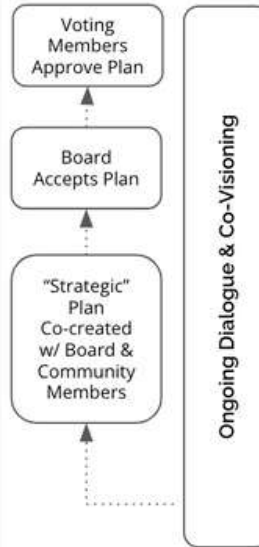
Lighthouse Labs coding bootcamp.

# COMMUNITY WEALTH BUILDING

## PRELIMINARY COMMUNITY ENTERPRISE SCHEMATIC



### Legal Decision Flow

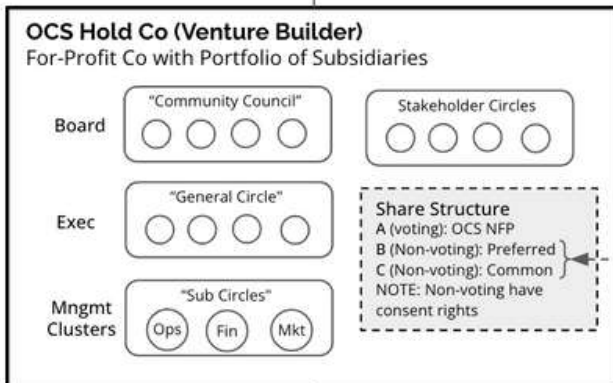


### OCS Board & Membership

OCS Board & Voting Members hold the integrity of the self-governing Community Enterprise. Eligibility for these roles include demonstrated commitment to community, experience with self-governance, and active participation in community circles and conversation's.

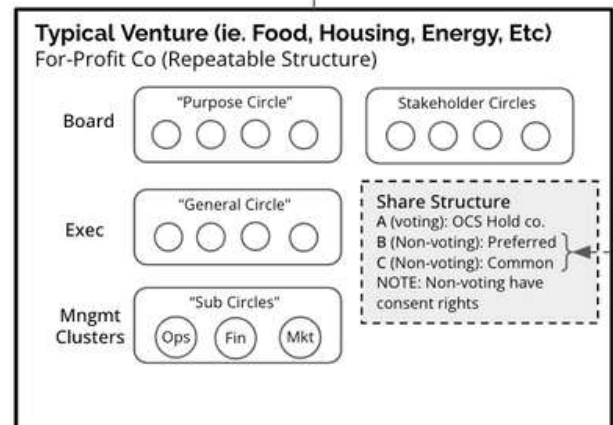
### coLab General Membership

General (non-legal) community memberships are for coworking, events, and overall participation within the OCS coLab community enterprise.



### OCS Hold Co Board

OCS Hold Co Board is composed of Venture CEO's, integrated partners, key investors, and NFP Leadership. Eligibility for the Board includes relational and self-governance training. Additionally, they are to actively participate in OCS circles and community dialogue.

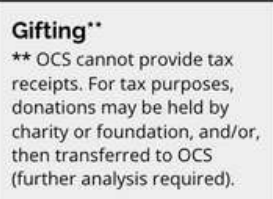


### Separation of Money & Power

To avoid the confit of money and politics, the NFP Board is responsible for systems and relational integrity, while the Hold Co Board is responsible for reporting learnings and allocating resources throughout ventures.

### Community Reinvestment

Further analysis is required, however, reinvestment is intended to be done in collaboration with the larger community.



# COMMUNITY WEALTH BUILDING

*Our current socio-economic systems continue to concentrate wealth and power into the hands of a few. This hierarchical private wealth building model has some advantages, however, it is a root cause of growing societal pressures.*

## COMMUNITY OWNERSHIP

Community Wealth Building integrates collaborative governance with community ownership models for a holistic approach to economic development. Cooperative's attempt to do this, however, they are constrained by legal and financing limitations.

The OCS Community Enterprise is an innovative approach for community ownership of assets and businesses that unlocks new pathways for integrated capital (equity, debt, philanthropic, and government). In combination with interconnected charities, non-profits, trusts, and philanthropic foundations, the Community Enterprise becomes a scalable and integrated pathway for Community Wealth Building.

Once proven, new Community Enterprise's can be replicated in other regions, and eventually woven together for larger socio-economic transformation. The combination of 'Exit to Community' and rebuilding resilient communities systems with integrated capital applies across sectors: tech / AI, energy, housing, food, health, and transportation (see actual examples on the next page).

Further R&D is required to flesh out optimal configurations for tax benefits and financing. Additionally, community venture building capacities will also be developed.

## EXIT TO COMMUNITY

Rather than exiting businesses to new private owners, "Exit to Community" is an approach that transitions businesses and other assets to community ownership. This can take a variety of forms, and the OCS Community Enterprise represents an integrated pathway.

"Exit to Community" is more than a business transition, it is a transformative act that generates community wealth. Additionally, transitioned businesses can serve as the foundation for scalable systems change.

### Massive Potential

**76%** of business owners plan to exit within the next decade\*

**\$2T** of assets will be transitioning to new business owners\*

**75%** of business owners leaving for retirement (many high net-worth)\*

**\$126B** of philanthropic capital\*\* available for Community Wealth Building

\* Canadian Federation of Independent Business

\*\* Rally Assets

*For more information:*

- [Community Wealth Building - Democracy Collaborative](#)
- [Exit to Community - A Community Primer](#)

# COMMUNITY WEALTH BUILDING

## EXIT TO COMMUNITY - EXAMPLES

### PATAGONIA

In 2022, Patagonia took bold leadership and exited to community (they called it 'exit to purpose'). This ensured the business profits were continually reinvested towards environmental wellbeing. The following was their approach:

- 100% of voting shares transferred into a trust to protect their values.
- 100% non-voting shares transferred into a non-profit to fund their environmental mission.

### SENIOR CARE HOME (ALBERTA)

A high net-worth family owned a care home valued at \$10M. Instead of selling to the highest bidder, they showed community leadership by:

- Gifting 50% to a charity, who in turn raised \$5M debt to acquire 100% of the asset.
- That charity then turned the under utilized asset into a thriving community centre with day care, weekend events, and utilized the commercial kitchen for a social venture.

## INTEGRATED COMMUNITY SYSTEMS - EXAMPLE

### COMMUNITY OWNED SOLAR PV

The Community Enterprise can be utilized for developing large scale community owned solar PV. A scenario could include the following:

- 20 MW at 250+ kw installations distributed on commercial and large residential buildings
- ~\$1.60 / watt installed
- Capital required (\$32M)
- 80% financed (\$25.6M)
- Utility Power Purchase Agreement at higher community rate
- Potential 'equity buy-back' option

Value: Rather than private power developers capitalizing on the transition to solar PV, communities could have continual cashflow while building energy resilience.

\*NOTE: investment grade proforma has been completed on the opportunity.

**We urgently need a humanism capable of bringing together the different fields of knowledge, including economics, in the service of a more integral and integrating vision. Today, the analysis of environmental problems cannot be separated from the analysis of human, family, work-related and urban contexts, nor from how individuals relate to themselves, which leads in turn to how they relate to others and to the environment."**

*Pope Francis in Laudato si' – "On care for our common home," 2015*

# ACTIVATION PLANS

**AIM:** Initiate and validate the OCS Community Enterprise framework for Community Wealth Building

## 1. CORPORATE FRAMEWORK

The OCS was established as a Federal Not-for-Profit Co. in 2020. However, traditional bylaws, hierarchical corporate governance and decision-making models are not “fit-for-purpose” for a systems-focused Community Enterprise. The OCS has adopted Sociocratic governance and decision-making, and is incorporating best practices for systems capital investment and ownership.

The OCS is ready to refine its corporate framework through community consultation and expert advice. This will enable OCS to develop final working versions of:

- Sociocratic Bylaws for Distributed Decision-making
- Community Ownership models
- Developing legal/tax frameworks to transition businesses to Community Ownership
- Systems Capital Investment models (including philanthropic)
- Venture Builder scoping & partners

These are expected to become living documents and will be updated based upon actual experience and community stakeholder input.

## 2. CAPACITY BUILDING

The OCS recognizes that Sociocratic governance, systems-based capital and circular economy strategic planning will be new to many of our community stakeholders. In order to participate fully and effectively, stakeholders will benefit from education and orientation to the elements of the Community Enterprise framework and direct participation in ceremonies and practices that differentiate the OCS approach and drive successful outcomes.

We anticipate a 6 month working timeframe will be needed to build the necessary capacity and foundation for the first community venture. This involves:

- Establishing Board of Directors ('Visionary Council')
- Educating/orienting on Community Enterprise framework
- Implementing governance and operational ceremonies, metrics, cadence and escalation mechanisms
- Establishing community agreements & practices



# ACTIVATION PLANS

## 3. APPLIED PROTOTYPE

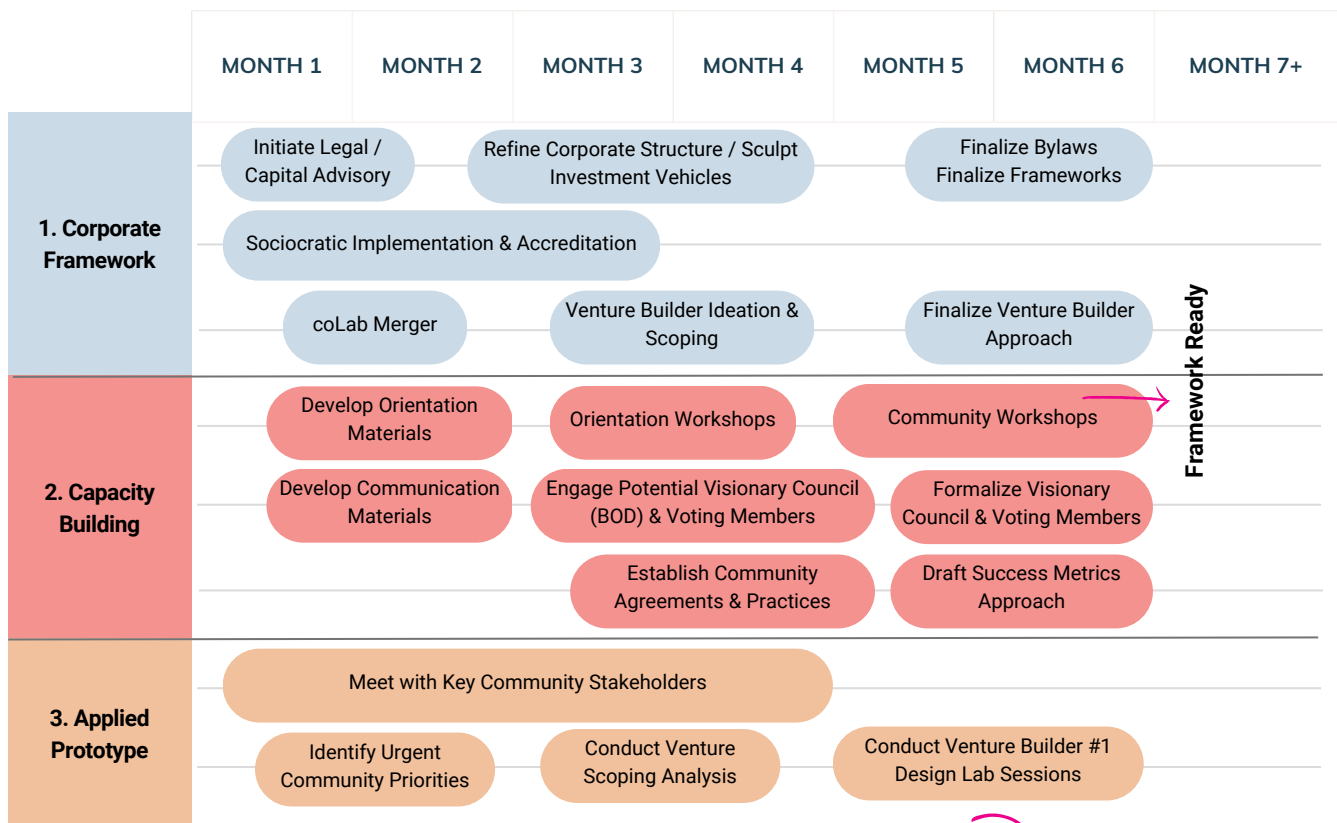
The key to successful systems innovation is the ability to apply, monitor, learn from and continually improve. The OCS proposes an agile approach to Community Enterprise by implementing an Applied Prototype (or MVP-Minimum Viable Project). The Applied Prototype brings together community stakeholders to initiate Community Enterprise as a system approach to an urgent challenge such as food security, sustainable energy, housing, and/or homelessness in the Okanagan.

This will involve:

- Bringing a defined group of community stakeholders through a collaborative design process to rapidly co-create community venture #1
- Defining success outcomes within a 4P approach (People, Planet, Purpose, & Profits)
- Initiating investment and ownership for-profit venture structure
- Developing venture business strategy and plan to support operational launch

## IMPLEMENTATION

The following preliminary implementation plan outlines core activities and estimated timing:



*New Community Initiatives & Ventures*



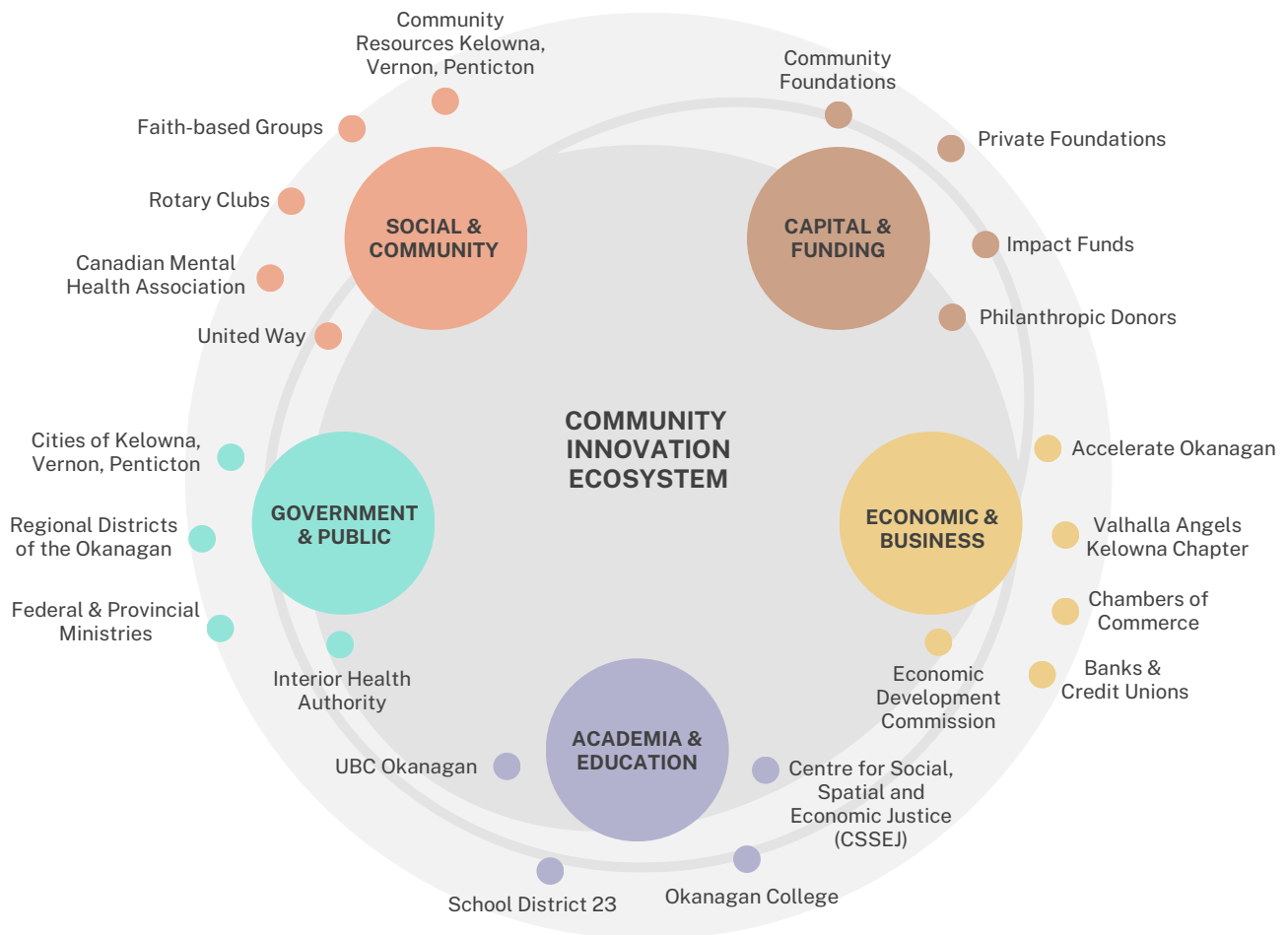
# COMMUNITY ECOSYSTEM

## COMMUNITY COMMUNICATIONS

To effectively activate the Okanagan ecosystem for community innovation, we will utilize a multifaceted approach, leveraging coLab's strong outreach capacity and the core teams broad network. Our primary focus will be on social media, newsletters, press releases, and events, which are vital for building awareness and engagement within the community.

An integral aspect of the communications is the opportunity to leverage the strengths of existing community organizations. For example, Accelerate Okanagan, Purppl, Impact Toolbox, and e@UBC have entrepreneurial and social innovation / impact capacities that can be integrated for larger transformative community potential.

## ECOSYSTEM MAP



# FORMING TEAM & BOARD



## Shane Lapp

Shane is a mechanical engineer and renewable energy expert with leadership experience in high-growth corporations. With four years of graduate studies in community psychology, he brings a unique perspective to his role as a Creative Ecosystem Opticist (CEO), guiding the development of holistic community ecosystems.



## Shane Austin

Shane is a creative soul who thrives on collaborative expression. With a background in art, music, and design, he brings a unique perspective to his role as coLab lead and Serendipity Architect. His passion for co-creation and community building guides his work as he creates spaces for inspired collaboration.



## Greta Reid

Greta is an Indigenous artist and entrepreneur with a deep commitment to community wellbeing. She is passionate about Indigenous justice and uses her role as a Community Catalyst to support positive change. Through her work, Greta seeks to build stronger, more equitable communities that prioritize the needs of all.

## BOARD OF DIRECTORS

Our Board (called a 'Visionary Council' in Sociocracy) has strong adherence to corporate compliance and legal / fiduciary responsibilities. The Board is committed to building the OCS Community Enterprise's Framework for Collaboration, the Centre for Community Innovation, and developing applied Community Wealth Building prototypes. We are actively seeking new members who share our values and vision, while also bringing in cultural diversity and legal/financial experience.

NAME	ROLE & EXPERIENCE
<p><b>Barri Harris</b></p>	<p><b>Treasurer:</b> Certified Management Accountant (CMA), past CFO, past Charity board treasurer, corporate and change-management consultant.</p>
<p><b>David Jenkins</b></p>	<p><b>Member at Large:</b> Past President of the Okanagan Sustainability Leadership Council, corporate leadership, business consultant, academia (UBCO Capstones).</p>
<p><b>Shane Austin</b></p>	<p><b>Secretary:</b> Founder of the coLab, innovation consultant and training, faculty and program designer at Centre for Arts &amp; Technology.</p>
<p><b>Shane Lapp</b></p>	<p><b>Chair:</b> Past CEO, Professional Engineer (non-practicing), Corporate leadership, Financial modelling, M.A. Community Depth Psychology.</p>

# SUCCESS & REQUEST

## OBJECTIVES

## OUTCOMES

Validate fit-for-purpose of distributed decision-making and governance models for systems change initiatives

- Sociocratic governance and management systems operational
- Establish approach for integrating community input

Determine effective approaches to incentivize investment & philanthropic capital for long-term systems change initiatives

- Legal vehicles & pathways for transformative investments & philanthropic capital
- Committed funders ready to go

Evaluate Community Ownership models as effective mechanisms to build and distribute community wealth

- Collaborative legal and accounting frameworks for Community Ownership

Convene a pilot project using systems thinking/systems change to address urgent community challenges

- Venture Builder Design Lab #1 complete
- Venture #1 business plan complete & initiated

Assess effectiveness of systems approach (Community Enterprise) to achieve 4P success as compared to traditional non-profit ventures

- Community defined success & value metrics (4P: People, Planet, Purpose, & Profits)
- Applied measurement approach

## REQUEST: FUNDING & PARTNERSHIP

We are looking for action oriented funding partners who share a long-term vision, and who are ready to set forth on a journey to co-create transformative systems change via the Community Enterprise framework (knowing it will evolve).

**Funding Request:** For discussion

**“What we need now is a radically new approach to investing with the explicit aim of systems transformation...**

**one that deploys capital with a broader intent and mindset; that is anchored in different methodologies, structures, capabilities, and decision-making frameworks; and that moves away from a project-by-project mentality.”**

‘Design Foundations for Systems Capital’ 2022



**Together we can collaboratively build a flourishing future, one our children and grandchildren will be proud of inheriting.**

## CONTACT US FOR FURTHER INQUIRIES

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