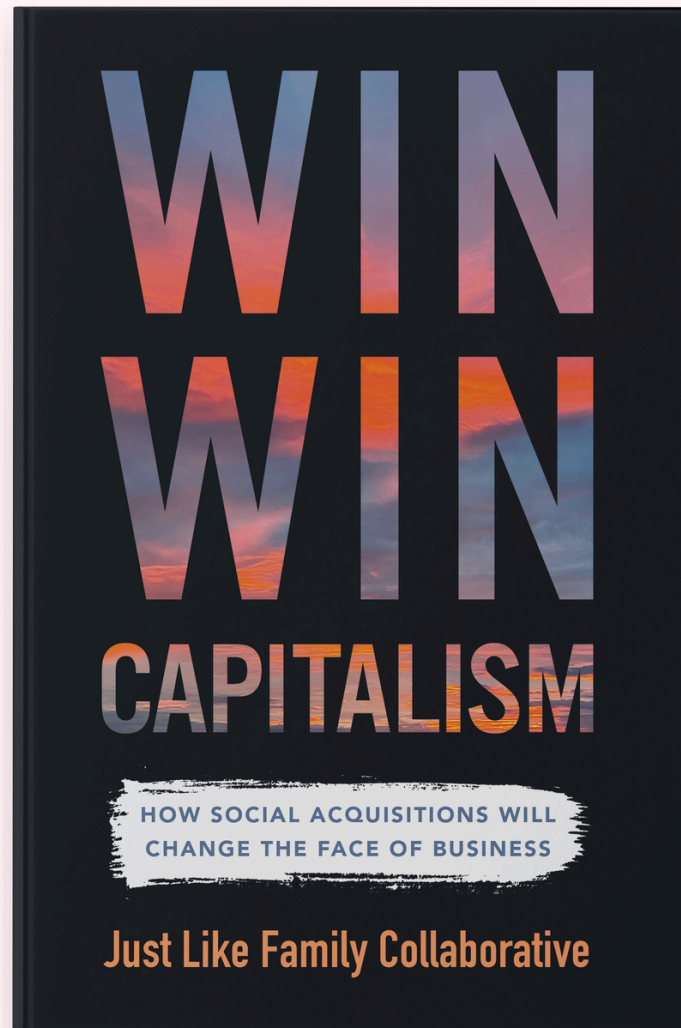


JUST LIKE FAMILY[®]
HOME CARE



Win-Win Capitalism

Book Study for Changemakers
and Nonprofits

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Introduction

Welcome to the Win-Win Capitalism Companion Guide for Changemakers! Whether you're a nonprofit looking for a new direction, a hub searching for a new way to strengthen your community, or a community development organization that wants to provide a new service, we commend you for your desire to learn about how capitalism in its current form doesn't work for everyone. We hope this book study will help you learn about the power of social acquisition, encourage you to embrace possibilities, and challenge the status quo.

We recommend that you meet on a weekly basis for one month to complete this book study.

Each Chapter Review includes:

- **Expanded reflections or expanded quotes from the Just Like Family Coalition.** You might set an expectation that participants read these in advance of the meetings or read them together when you gather.
- **Discussion questions.** Group discussion can be “round table” or “popcorn style”, ensuring that everyone has space and a chance to speak. Larger groups may find it more effective to do breakouts for each section and then report back to the main group.

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- **Reflection questions.** Participants should keep a personal journal in which to answer reflection questions and record inspirations that occur during the group discussions or over the week. Assure individuals that they never have to share reflections unless they would like to.

Recommended Course of Study

Week 1: Prologue, Chapters 1 & 2

Week 2: Chapters 3-6

Week 3: Chapters 7-10

Week 4: Chapter 11-15

We're so glad that you've chosen to go through "Win-Win" using the companion book study. Please [contact us](#) if you have any questions about the book.

Week 1

Welcome to Week One! For this week, please read the Prologue and Chapters 1 & 2.

Prologue: We are the best! A non-ego approach to business

We are taught to be humble about the amazing things we do in the world. However, the ethical dilemma of humility is that no one will know about the good work you do if you don't talk about it. We also risk limiting our potential by under valuing the change and impact we're capable of making.

“

You've got to put in the work. And you have to play with confidence. You've got to believe in yourself.

- Paul Pierce

From the Team: Alana, Operations Manager

“How do you become an agent of change if you ask permission to make the changes needed? Stop asking permission to change the world and stop making people ask your permission to change the world. Your teams need you to be a leader, even if your position might psychologically or socially make you feel like you are the bottom of the hierarchy. There's no harm in trying.”

Prologue Discussion Questions

- What appears as an insurmountable challenge to you now? Why does it feel so insurmountable?
- What movement are you part of?
- What do you care about to change? How are you part of it?
- What is the difference between the work you are doing day-to-day versus the vision for which you hope? Is there a gap? Is that because you feel like you'll never reach the vision for which you hope?
- Which barriers prevent you from doing more? Consider barriers that are real versus those that might merely be perceived barriers. What assumptions might you be making?
- If the full change that you seek isn't possible in your lifetime, what could be the first step to set up future generations to realize this full potential?

Prologue Reflection Questions

- What is meaningful to you? How are you making a difference in the world?
- What does that indicate about your own personal why? How does this motivate you?
- Imagine yourself on your 80th birthday. What do you hope people say about you? What are you doing today to make this happen?

Chapter 1: And So, It Began!

Look around you right now. You are in a book study thinking about the future of your group of changemakers with a few other people. You might be sitting in a basement yourself, you might be on Zoom, or you could be at someone's home considering this text. This is not dissimilar from the starting point of the story which you're now reading.

You might think, "We don't have that much. How could we do something like this?" Yet, by looking at what you have, you can begin to see the abundance available to changemakers generally—and to you specifically. You might see these things around you:

A building in the middle of town or a space where people can meet.

- A team of amazing volunteers that are willing to do work that is not necessarily in the spotlight.
- A network of other community partners and connections.
- A community of people with personal financial resources as well as an organization's resources.
- A community that trusts each other, likes each other, and is loyal to each other.

Thinking this way, you can quickly see that you are rich in resources.

Win-Win Capitalism Guide for Changemakers

You are at same starting point as the 8 leaders in the church basement. In fact, you are actually much further ahead! The 8 people in the church basement who inspired this story had no roadmap to follow. They didn't realize the change that was possible. And they didn't have mentors to support them on their journey.

“

The fastest way to bring more wonderful examples of abundance into your personal experience is to take constant notice of the wonderful things that are already there.

- Esther Hicks

“

Leap, and the net will appear.

- John Burroughs

From the Team: Sarah, Chief Operating Officer

“So, the very, very beginning...how we started in Victoria. We had about eight people on the committee, and we knew we wanted to run a social enterprise that was aligned with the values of the local church. We looked at a number of different options where we could make a difference socially and environmentally: what were some of the issues out there that we could solve?

“We looked at everything from tech to recycling to environmental stuff, and we decided that home care and the aging population was something that was really important. We decided that we wanted to look at a home care business. We had options at that point as to whether we were going to look at starting our own or joining a franchise model.

“When it came to having started a few companies of my own, I realized that it’s a long time before you can actually get to home care. When you do it on your own you must come up with your own logo and website, and there’s a lot of cost and time that goes into it that isn’t home care. You’re working generally for at least a year before you’re in the business that you want to get into. The franchise model allowed us to get to making a difference for people sooner.

“The capital requirements were relatively low. And it came with all the things that we were not experts [in]—the website, the logo, the branding, and the sales brochures. We had a great base to start so we could just get to market quickly and get in front of people where we knew we could make a difference. We chose Just Like Family Home Care because they were Canadian, they were local in British Columbia, and they were really relationship-based. They focused on that relationship that we felt had been missing so much in home care. It goes to numbers, it goes to convenience, it goes to all these other things in the traditional business, and we wanted to do things differently. We wanted to approach this matchmaking idea, where you had a caregiver aligned with the client with

similar interests, or similar languages and similar skills. Not only could they look after each other and have the skills required to look after each other, but they could enjoy their time together. It would move from surviving to thriving.”

From the Team: Alana, Operations Manager

“If you have fear, I think it’s going to be easy to doubt every chapter in this book. Fear has been the biggest roadblock that I have seen for people. The worst part about it is that when you ask people what their fear is, they go, ‘I don’t have any.’ Yet everything they do or don’t do has sprinkles of fear in it. Could be fear of failure, fear of believing in something that’s unconventional but can be a successful path forward, fear of partnering with the wrong people, fear of not being perfect, fear of disappointment, or fear of upsetting the apple cart.

“The key thing [is to] name your fear and be vulnerable. It’s okay to have fear. It’s not okay to hide the fear from your team. It’s not okay to let fear determine your worth or value-add, and it’s not okay to let fear prevent you from being creative with solutions or giving up on yourself before you have even tried. Fear is not an excuse to not upset the apple cart. In fact, when we upset the apple cart, we often evoke the change required to make our business more functional. I want to stress here that it’s not by challenging everyone in your path but channeling the ‘why’ in situations when the norm no longer makes sense.”

Chapter 1: Discussion Questions

- If you had been sitting in that basement, what might you have contributed to the conversation? What questions might you have asked?
- What ideas might you have brought to the table?
- What might have prevented you from taking this leap into a new situation?
- What fears or barriers are blocking you now?

Chapter 1: Reflection Questions

Think of a time that you were afraid of doing something—moving away, changing jobs, going through a separation, or any other significant life change.

- After the change, what happened? How was your life changed? What positive impacts occurred?
- Was the change as good or bad as you thought? How did you feel about yourself, knowing you could overcome your fear?

Chapter 2: An Unlikely Catalyst

Nonprofits and charities have assets and structures that make them a critical component of society. Your strong governance and clear focus on vision and mission set you apart from many businesses. People are drawn to you, eager to support you, and feel uplifted by their connection with you. This heartfelt impact provides a solid foundation for exploring new opportunities.

A SWOT analysis starts by examining internal strengths and weaknesses of an organization (which we just did in the last chapter by thinking about abundance as well as barriers). The next step is to consider external opportunities and threats by examining current politics, economics, social trends, and technological changes. We can use this information to extrapolate future trends and find innovative ways of getting ahead of them.



Innovation is the future delivered.

- Jorge Barba

Using business terminology in a nonprofit or charitable setting may feel “*wrong*”. This means that when we use tools that work in a business setting we distrust that they will work in the nonprofit or charitable space. In “Win Win Capitalism”, we show that greater impact can be made by overcoming this mindset. Using a SWOT analysis for our own organization may allow us to see things that we couldn’t see clearly before.

“

The meaning of life is to find your gift. The purpose of life is to give it away.

Pablo Picasso

“

There is no power for change greater than a community discovering what it cares about.

Margaret J. Wheatley

From the Team: Lori, Partnership Team

“Years before I came to work for EDGE, I learned of the quote that “the definition of insanity is doing the same thing over and over expecting different results.” It has always stuck with me.

“Within the church there are those who are resistant to change. I have been told, ‘This is the way we have always done things, and we will continue on this way until the last of us is dead and the church is closed.’ There seems to be combination of expectation, hope, and faith, that even though we are doing nothing different, MAYBE this time things will change! In many years with EDGE, there are those whose first question was: how do we get people to come to church? Why don’t they come? What can we do to get more people to come?

“The stages of change management include shock, anger, acceptance,

and commitment. Those who languish in shock and anger tend to be unwilling to even consider having a conversation about doing things differently. Rather than contemplating how they might change themselves, they focus on what they could do to enhance or persuade others to join them, particularly when it comes to Sunday worship. The tendency for some was to think about ‘bums in seats’ rather than focusing on the difference they could make out in the wider community beyond the church doors. Church is so much more than Sunday worship.

“Those that accepted this also realized that this was not their parents’ or this grandparents’ church. They knew that society had changed, and that they must, too. They began to think outside the box they had worshipped in.

“What do others need? What gifts do we have, and how can we differentiate ourselves? How can we connect with people in meaningful ways? How do we let people know we accept them on their terms? How can we partner up and work with others to make peoples’ lives better?

“Who do we partner up with and work with? What’s next? All these thoughts (and many more) indicate that there was acceptance—that just as society had changed, the church must AND should change. For those people and groups there was commitment to do things that had never been considered, much less acted upon before.

“Rather than thinking about what OTHERS must do, they reflected upon what THEY must do instead. How can we take care of others? What can we do that will leave a lasting impact on the lives of people outside our church into the wider community? What if we considered this new thing? What if we did something we have never thought of as church before - but will make a huge impact in the lives of others? Who can we work with on this? What must we keep, and what do we need to be willing to let go of? IS THIS CHURCH?

“Just by accepting that there may be a different way to do church is a monumental shift in thinking for some, much less making a commitment to act upon any shift in that thinking. Not everyone has the willingness to try out new ways of thinking and doing, but for those who dare to dream? Possibilities are endless.”

Chapter 2 Discussion Questions

- What is a nonprofit? What is a charity?
- Now take off your “social” hat. Think about the opportunities out there. What is on the horizon that feels obvious to you?
- Now put your “social” hat back on. How could you take what you see on the horizon and begin to transform your organization?

Chapter 2 Reflection Questions

- What gifts and natural talents do you have? How are they appreciated at home, at work, and at your group of changemakers?
- Is there a gap? Is there a misalignment? Is there a way to realign your gifts with this “blue horizon” thinking?



Congratulations! You've finished Week 1!
What have you learned?

Week 2

Welcome to Week 2! For this week, please read Chapters 3, 4, 5 & 6.

Chapter 3: What's in Social Acquisition?

We're often asked why no one's done something like this before in Canada. Once it was done, it was the most obvious thing in the world. But before it was done, everyone thought it was impossible. People thought it must be illegal. And until it was done and proven to work, people were convinced that it hadn't been done before because it shouldn't or couldn't be.

Ironically, the best innovations in the world are the things that—once done—obviously should have been done long ago. Their huge success stems from people being unable to imagine why or how they once lived without them. Some technological examples include:



Pay by credit card on your phone. Why would we force ourselves to carry more things?



Streaming videos so you don't have to have all those DVDs (or VHS tapes) stored all over the house.



Social media & smart phone, which is a whole other debate.

“

So many of our dreams at first seem impossible, then they seem improbable, and then, when we summon the will, they soon become inevitable.

- Christopher Reeve

In systems change, often the barriers to technological innovation are perceived rather than real barriers (for example, the technology and infrastructure doesn't yet exist). For social acquisitions, removing barriers meant looking at the existing tools and pieces and just putting them back together—*differently*. We then educated stakeholders who had doubts about working with us, financing us, or believing in our win-win approach.

One of the most common barriers to systems change is a win-lose or “duality approach” to thinking about the process—creating a “yes/no” mindset instead of an attitude of “how can we make this work?” Success for us meant achieving “more impact, faster.” To reverse-engineer from that goal, a social acquisition became the clear solution.

“

The best partnerships aren't dependent on a more common goal but on a shared path of equality, desire, and no small amount of passion.

Sarah MacLean

From the Team: Jeff, Chief Financial Officer

“Operating a social impact venture like Just Like Family is difficult but extremely rewarding. There are many things to consider beyond the bottom line and the goal is to maximize or optimize stakeholder value, which are not just shareholders, but much broader [people] like employees, patients, the community and beyond. It’s a much more difficult task to operate a social impact firm given these various dynamics; however, having robust operations combined with an intentional strategic plan can create long-lasting, positive externalities, making true and effective change in society. The ethos of Just Like Family permeates beyond just running and operating a business but is also core to how Just Like Family looks and values strategic financial partnerships, a key pillar in value creation.

“There are countless examples of meeting with bankers, financiers and strategic partners who claim to be supportive of a social impact firm but gravitate toward a singular view based on financial models focused on revenue, bottom line, and credit worthiness. In many cases, these companies value the financial return over the holistic combined economic and social return that an organization like Just Like Family would provide.

“These organizations fall short of understanding the value proposition of Just Like Family, and it may be multifactorial—they may be set in their traditional ways of thinking, don’t have the right resources to support a different view or approach, lack clarity around the social impact value, or a whole host of other reasons. What is apparent, however, is that the

byproduct of these discussions results in a further refinement and edification of Just Like Family's priorities and values. It further crystallizes what is important to the organization, as it self-selects out partners that are not aligned and highlights Just Like Family as a unique firm that is leading the way in a new investment class category. Furthermore, through these strategic partnership discussions, Just Like Family in many ways acts as a missionary—not only spreading the 'good word' of Just Like Family and its value proposition, but also paving the way as a leader in changing other organizations' approaches, views, and perspectives on social impact companies."

Chapter 3 Discussion Questions

- What is a broken system?
- What is the system trying to achieve? What is the vision of success? Can we work backwards from what that success should look like to find a different pathway to get there? (Example: Reducing violence in communities wouldn't typically suggest cutting police funding in favour of preventative resources.)
- In a stakeholder approach, who are the stakeholders that we impact as a group of changemakers?
- Who is part of our ecosystem? How does the ecosystem work? What parts are broken and why? What is our role as a group of changemakers in this ecosystem?

Chapter 3 Reflection Questions

- How might “duality thinking” limit relationships and conversations you’re having? Have you entered a conversation or a relationship thinking that it must be a certain way or the highway? How did this way of thinking impact you? How did it impact others?
- How could focusing on the desired outcome (like a healthy relationship or conversation) and reverse-engineering the steps to achieve it change your approach? Would you be more curious? Listen more intently?

Chapter 4: The Usual Suspects are Not Usual at All!

After finalizing the acquisition, people told us it was impossible to achieve through a normal process. Their point was valid—financing from a financial institution typically takes at least 90 days, assuming everything is in place. The fact that we did this with charities, which usually have longer decision-making processes due to governance, made it seem even more improbable.

It's a good thing we didn't know it was impossible until after we did it! The lesson isn't about doing the impossible, but about seizing opportunities and pushing harder when things got tough. We weren't "lucky" to succeed—we made it possible through hard work, which made us appear "lucky."

Throughout this journey, we often felt we were on the right path, staying open to opportunities and making the most of them. Despite facing what seemed like insurmountable challenges, by applying our talents and hard work, we were able to create our own "luck."



It always seems impossible until it's done.

Nelson Mandela

“

I’m a great believer in luck, and I find the harder I work, the more I have of it.

Thomas Jefferson

From the Team: Carla, CEO

“Whether you think something is possible or impossible, either way you are right.”

Chapter 4 Discussion Questions

- What does “being on a good path” look like in your own context?
- What stops you from embracing new opportunities?
- Which could increase your openness to new opportunities?
- In what areas are your opportunities right now?

Chapter 4 Reflection Questions

- Think of a time when you felt like you were really meeting your vision.
How did you know? How did it feel?
- What made it feel right? What signs made you feel that you were on the right path?

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- Think about that time again and your involvement in the outcomes. Did you try harder? How were you more present? Were there other circumstances, efforts, or people that contributed to this path being a good one?
- How would you know in the future that you're on a good path? How would you respond?

Chapter 5: There Is No Such Thing as a Good Deal

The old “buyer beware” mindset reflects a win-lose approach to capitalism. In this chapter, we explore sellers motivated by self-interest, such as exit strategists, opportunists, and legacy builders, all driven by negative emotions. Since writing this book, we’ve supported nine business transfers where emotions and fear often created lose-lose situations for both seller and buyer.

But what if we move beyond this “us-versus-them” dynamic, even in social acquisitions? Could transactions become more relational and transformative, creating win-win outcomes? Building trust and sharing information fosters such conversations. Changemakers could reshape these deals by promoting co-op conversions, employee ownership, or profit-sharing, turning legacy building into a more relational process.

“

When one side benefits more than the other, that’s a win-lose situation. To the winner, it might look like success for a while, but in the long run, it breeds resentment and distrust.

- Stephen Covey

“

Community is the foundation to success.

- Kristen Jones

From the Team: Alana, Operations Manager

“Personally, I think being a part of a company where they advocate for you to wear your heart on your sleeve at every part of your day is the easiest job I've ever had. So why not be a leader that advocates for that?”

“What a beautiful gift! You would get to put people first as a career or company you own and get to be a part of a business where partnerships don't need to have a goal of just profits to show your achievements. Instead, having ingenuity and of thinking outside the box so you can be the agent of change the 10-year-old version of you would be proud of, would reflect more when people rate your company and want to work with you as a partner or employee.”

Chapter 5 Discussion Questions

- Think about all the organizations that you interact with as a group of changemakers. Which of these are relational and which of these are transactional? Why?
- For the ones that are relational, have they also been transformative? How have they changed you? How have they changed the other party?

Chapter 5 Reflection Questions

- Do you own a business or know someone who is looking to sell their business?
- What could make this transaction different?

Chapter 6: Why Pursue a Social Acquisition?

Major innovations often arise from the fringes, where challenges push people to innovate out of necessity. Many changemakers are familiar with the “community hub” model of Social Enterprise 1.0, a concept used for decades, often in places like townhalls or worship spaces. This model isn’t new, but we should ask: are we simply checking the social enterprise box, or can we go further? Why not consider a social acquisition (Social Enterprise 5.0)?

Starting a social enterprise is tough, with many businesses failing early. However, a social acquisition reduces startup uncertainty by taking over an already successful business. With many Baby Boomers retiring, this is a prime time to explore social acquisitions.

“

Why start a new and unknown business when you could just buy a previously established one?

- Carla Leon, CEO

Rev. Rob Dalglish, Founder of EDGE Ministries

“In 2010, I was invited to create a national United Church initiative to reboot church development and growth. The question for most people was, “how do we stop the bleeding” let alone reverse the trend. The church in Canada had been in decline since 1965, and not just the United

Church. The purpose, "abundant life for all", was clearly as relevant as ever. The deeper question was, what new embodiment was the church being called into, in order to truly live out that calling in a new social context?

“The Fresh Expressions movement in the UK was demonstrating the vitality of niche spiritual communities focused on a specific mission, which often took the form of a social enterprise. Think of a Café where paying customers contributed a portion towards those who couldn't pay, and hosted conversations and action and even prayer and meditation for justice, or a bread making school that taught not just cooking but the spirituality of bread making, shared their bread with the hungry and offered post cooking counselling for those who wanted it.

“Exciting? For me, all of this prepared the way for the mind-blowing opening. The master franchise became available. Could collaborative partnerships that have helped pave the way to funding scale across Canada and even into the USA? Is this a version of the ‘New Abbey’, a reincarnation of the social, spiritual centres of life in the British Isles in the Middle Ages? Could it be that the convergence of social movements, spiritual awakening and church transformation take on a form that is not just sustainable, but carries the promise of societal level impact?”

Chapter 6 Discussion Questions

- Why did you pick up this book and agree to have this conversation? When you read this chapter, were you initially thinking about a new revenue stream for your group of changemakers? Are you drawn to Social Enterprise 1.0?
- Now that you are exposed to other examples that go beyond revenue generation, how is this changing what is possible for you?
- It will not be perfect. When you buy it, it is based on the values and systems that might be different than yours. How would you feel about that?



Congratulations! You've finished Week 2!

What have you learned?

Week 3

Welcome to Week 3! For this week, please read Chapters 7-12.

Chapter 7: Where Are Charities Invested Today?

What is the point of a charitable investment?

This question has multiple answers:



Charitable investments preserve income so that the entity can continue to distribute proceeds or fund program-related activities, with some level of return.



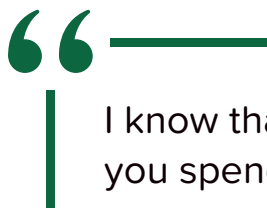
Charitable investments help entities avoid losing all their reserves and endowments, reducing the risk of investing.



Charitable investments disrupt society using changes and innovation. Impact investors do this by putting their money into program-related investments or concepts in which others aren't interested.

Is it possible, with a diversification strategy, to do more than one of these?

Depending on the amount of your investments, it could feasibly be all three!



I know that inner wisdom is more precious than wealth. The more you spend it, the more you gain.

- Oprah Winfrey



Your purpose in life is to use your gifts and talents to help other people. Your journey in life teaches you how to do that.

- Tom Krause

From the Team: Susan, Board Member

“I must speak from being a faith-based organization. I think our priority is to provide the best, as stewards of resources that have been entrusted to us. This is one of the ways that it's emphasized. The Christian tradition is that we are led to take care of people in various settings. Just not taking care of people but supporting them to become all that God has created them to be. And I believe that this is one of the ways that we can do that. Reaching out to people, but not just the people from an organizational standpoint; the foundation of the organization I believe is built on those same principles. When you have an organization that built on those principles, it only helps what the organization does or why the organization exists. To continue to live in those principles. I think that's very important if we look at the world around us and what's happening around us - that level of care and concern is just not present to the masses. As present to those who can afford it, and to those who are elite and wealthy, but not to the masses. And I am of the belief that the same level of our care should be applied across the board to everyone, regardless of where they live, what the economic status is, what they believe. All those things we are called to be caretakers of God's creation and that's inclusive of everybody. And so, I think that's vital and very important to us as we continue to move forward.”

Chapter 7 Discussion Questions

- How do you make investment decisions today? How do your governance and structures prevent or empower this new thinking?
- As accredited investors, what roles and responsibilities do you have? How has your thinking changed about this? What is your moral obligation with your investments?

Chapter 7 Reflection Questions

- Why doesn't direct equity investing by charities happen already?
- Reflect upon the perceived and real barriers you see and how they may affect your moving forward.

Chapter 8: Franchising 101

Nonprofits and charities are the original form of social franchising. Many of the largest organizations we know today—community foundations, hospitals, shelters, food banks—were founded over a century ago during a time of bold, large-scale thinking. Across North America, these organizations have replicated themselves in countless communities.

However, this growth also carried harmful colonial practices, which we are working to change by fostering inclusivity and sustainability. By prioritizing context, listening to people, and recognizing that one model doesn't fit all, we can ensure social franchising is done better as we move forward.

“ —

Big business is always looking for tangible investment opportunities for social responsibility funding investment vehicles that have checks and balances in place so a social franchise could be the best opportunity in this instance.

- Vera Valais

“ —

Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has.

- Margaret Mead

From the Team: Sarah, Chief Operating Officer

“Charities owning the business really inspires me, because I believe that that is one of the major ways we do business differently. And I believe that the charity model is shifting with new generations. I don’t think our younger generations are taught to think it’s part of their everyday life.

“And so, how do we keep the charities running in the future? I love that the charities have a hand-up rather than a hand-out in the business. And so, if we do have a business that is run by not-for-profits, but as investors, the dividends go to those charities and then that immediately goes back into the community and is a full life cycle. What is very exciting to me is that we are not paying for yachts or some mansion on an island. And that this is a different way to contribute to the different areas of our community through the not-for-profit, while they are earning money through the home care.”

Chapter 8 Discussion Questions

- Replicating without discernment or listening can cause significant harm. How can we avoid this?
- What amazing strengths do changemakers bring to social franchising?

Chapter 8 Reflection Questions

- How do we navigate power structures in franchising?
- How are we ensuring that we are relational rather than transactional?

Chapter 9: Edge of the Rabbit Hole

As you read this chapter, ask yourself:

What are the different hats you wear in different scenarios?

How do you adapt your communication style as you work with others?

How can you show up being curious rather than having pre-determined answers?

Being courageous and remaining curious are amazing traits to have in a changing world as we figure out how to be changemakers in the 21st century.

Just Like Family's first 60 days were mostly about active listening—real and deep listening. And as a consultant, when you ask a lot of questions, you recognize that the people to whom you are speaking already have the answers. They are literally telling you the next steps.

What would social entrepreneurship look like if we did this?

“—

We know only that our entire existence is forced into new paths and disrupted, that new circumstances, new joys and new sorrows await us and that the unknown has its uncanny attractions, alluring and at the same time anguishing.

- Heinrich Heine

“ —
|

I have no special talents. I am only passionately curious.

- Albert Einstein

“ —
|

The comfort zone is the great enemy to creativity; moving beyond it necessitates intuition which in turn configures new perspectives and conquers fears.

- Dan Stevens

From the Team: Carla Leon, CEO

“It was such a strange moment to wait and introduce myself after five people spoke before me about how great I was. Having worked in nonprofit and charities for the last decade as a business coach, it wasn’t a natural thing to own the room. I was the person who told the main decision-maker, founder, owner, executive director what to do and then had to persuade them. I usually had the answers to questions on behalf of my clients, but I wouldn’t butt in with them. Now, everyone was turning to me. Really for the first two months, every meeting, every question, every Zoom call was focused on me. Not in a nerve-wracking way. But about authoritative power, rather than the persuasive influence that I was used to.

“The odd thing was that I was never nervous about meeting everyone. I probably should have been as I had no home care, healthcare, or

franchise expertise. But as a business consultant I had been put into situations needing immediate results in less time and knowing less about the situation.”

Chapter 9 Discussion Questions

- How do you ask the neighbourhood questions? How do you ask your partners questions?
- How do you become and remain curious? What does that look like?

Chapter 9 Reflection Questions

- Can you imagine stepping into a situation where you have almost nothing?
- What are your strengths? How do you lean into your own strengths and remain calm?
- How do you build trust?

Chapter 10: The Sum is Greater Than Its Parts

We quickly realized there's only so much we can plan for before taking action. That's why experimenting is key—it keeps us from falling into analysis paralysis, and we often learn more by doing.

For every impact we expected, at least one surprise emerged. We began to see that the seeds we planted could grow into something far greater!



Be a self-starter. Do it now! When you don't know how to do something, start. Beware of the paralysis of analysis. Be a person of action.

- Mamie McCullough

From the Team: Eloise, National Business Coach

“I remember when Carla first reached out to me to discuss the possible acquisition of a home care franchise. Going through the challenge of caring for aging parents, I was only too aware of how important finding good support is. I knew there were various home care organizations out there, some national and many that are regional, some for-profit and some not-for-profit, but there was no consistency in terms of offerings or their values. I was curious to learn more about Just Like Family (JLF) and how exactly it was going to change the home care landscape.

“From the start, JLF worked with charities to participate as shareholders in the company. This indicated that the company was focused on similar values of compassion, caring and empathy. I appreciated that charities wanted to invest in JLF because they also believed in the model of JLF and what [a] difference it is and can make in providing home care services. The alignment between the company and its investing shareholders is so important to ensure current and future decisions remain focused on its shared core values. And what a breakthrough for these organizations, to invest directly in a company they believe in, versus putting their monies in funds and other investments where they don’t know exactly how they are being used.

“Secondly, JLF as a franchisor has a different way of attracting new franchise partners. Right from the beginning of the discovery process, understanding what is important to the potential franchise partner and what their goals are is uncovered to ensure alignment to the company’s values and vision. Wanting to make a difference and providing a holistic approach to home care is the foundation of what JLF is about, and it is important for each of its franchise partners to share in that common goal. And when this is done well, success is achieved, but not just success measured by the bottom line; also success in making a difference in each community where JLF has a presence, including providing sustainable work for caregivers in a company that really cares not only about its clients but also its staff.

“In addition, the JLF way extends beyond its clients and caregivers and goes out to the community, where partnerships and relationships with organizations are developed who also share similar values of compassion, caring and empathy for not only the aging but all who require home care. As the national business coach working with the home office team and the franchise partners individually, I am privileged to help build the bridges between today and tomorrow—starting with pushing through preconceived barriers around what a company can do, the difference it can make, and how success can be measured, to providing training and support to map out a plan focused on increasing each franchise partner’s success. Always respecting the importance of getting out into the communities, attracting and retaining clients [and] caregivers, and developing partnerships with organizations who appreciate working with a company that truly cares about people and making a difference.”

Chapter 10 Discussion Questions

- Think about an experiment or program your group of changemakers implemented that led to unexpected outcomes. What were those outcomes?
- How many ideas have not made it past analysis? Why?
- What if you considered these things learnings rather than failures?

Chapter 10 Reflection Questions

- What holds you back from trying new things at times?
- Are you worried about being considered a failure?



Congratulations! You've finished Week 3!

What have you learned?

Week 4

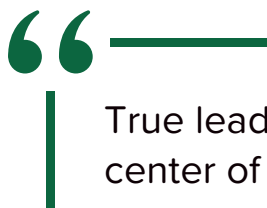
Welcome to Week Four! For this week, please read Chapters 11, 12, 13, 14 & 15.

Chapter 11: The First 90 Days

Servant leadership is key to a values-driven, people-first business. It requires humility, grit, and being hands-on—whether cleaning toilets or leading as CEO. This is true in small businesses, social acquisitions, or launching social enterprises.

One of a changemaker group's greatest assets is its volunteers, not just those who emcee once but those who consistently take on time-consuming tasks like setup, cleanup, and dishes for years. Their dedication shows true humility.

Remember, perfection in leadership doesn't exist. Leadership constantly evolves with new experiences, and striving for perfection only stalls progress. Offering grace to others and ourselves is essential.



True leadership is servanthood. Put the interests of others at the center of your decisions.

Dave Ramsey

“

Volunteering is the ultimate exercise in democracy. Your vote in elections once a year, but when you volunteer, you vote every day about the kind of community you want to live in.

Author Unknown

From the Team: Carla, CEO

“Picking up the phone was critical. No matter who it was, what they were concerned about, or when it was, I always picked up the phone. In fact, in the first six months, the 1-800 number only went to me 24/7. I received customer inquiries, caregiver inquiries, complaints, and everything under the sun. This was about trust-building and accountability. I wasn’t going to ask someone to do something that I wasn’t willing to do myself.”

From the Team: Carla, CEO

“We almost did it perfectly! I remember seeing head nods at the Family Meeting and qualifying questions rather than anyone disagreeing. Then, the day after the Family Meeting, one of the franchise partners called. I remember her saying to me, ‘This is your vision, not my vision. I just need to understand your vision for this.’

“My response: ‘This isn’t my vision. This is our vision. Do you believe in the vision that you just heard?’

“Not surprisingly she said, ‘Well yes, but maybe you should have spoken to people about it.’ Just another gentle reminder that there is no such thing as over-communicating.”

Chapter 11 Discussion Questions

- What does humility look like in servant leadership of a group of changemakers?
- What does grit look like in servant leadership of a group of changemaker?
- What’s the best way to foster and nurture these values to do the work?
Where is this already showing up?
- Are you giving yourselves grace?

Chapter 11 Reflection Questions

- How do you volunteer and share your own gifts?
- Have you undervalued your own contribution because it isn’t in the spotlight? All gifts are important.

Chapter 12: If It Was Easy, Everyone Would Do It

Innovation is exciting, but it can sometimes feel overwhelming if it happens too fast.

In hindsight, acquiring the second business taught us a lot—perhaps more than we anticipated and at a faster pace. Although it was challenging, Just Like Family Home Care is now a stronger business after buying back a franchise location, even if it took time for the team to see it.

The second acquisition brought new challenges, but each one strengthened us. With every mountain we climb, we build resilience, making future challenges easier. Success breeds success, and now, we're ready for what's next.

“

When things do not go your way, remember that every challenge - every adversity - contains it the seeds of opportunity and growth.

Roy T. Bennett

From the Team: Carla, CEO

“Running a telemarketing company in my late twenties taught me many lessons, but one of the most important lessons is that as a business you need to pick up your phone and at least listen to business opportunities.

Although everything in my body panicked at the idea of buying a second business four months after buying the first, it was important to stay open-minded and at least investigate it.”

Chapter 12 Discussion Questions

- What is thinking inside the box? Why would you do something or investigate an idea?
- What is thinking outside of the box? Why wouldn't you do this or investigate this?
- What if there was no box? What does success look like, and how can you work backward to determine what steps you should take today?

Chapter 12 Reflection Questions

- Where are our own limits for change? When is it healthy and when is it “too much”?
- On the flip side, is there a “too little”?

Chapter 13: Culture Eats Strategy

When we first joined the existing corporate culture, it was already strong. Expecting to keep it exactly the same was unrealistic, as new leadership inevitably influences culture. Instead of resisting this, we embraced it. Rather than mourning the changes, we celebrated the best aspects of the culture with the network and highlighted the authentic, sometimes vulnerable, qualities of our franchise partners. It was uncomfortable at first, and they may not have fully understood, but these small rituals were essential to preserving the ‘family’ feel as we grew.

Growth itself changes a culture—more size requires more structure and processes. Interestingly, even shrinking organizations experience cultural shifts.

Understanding why and how culture changes helped us better navigate our own. The key was having a plan for culture and always staying in tune with it.

“ —
|

Determine what behaviours and beliefs you value as a company and have everyone live true to them. These behaviors and beliefs should be so essential to your core, that you don’t even think of it as culture.

Brittany Forsyth

From the Team: Susan, Board Member

“I’m excited. The whole process has been just wonderful. Being able to see what is good and starting at the foundation. I always talk about people having a solid foundation and then you can build, but you always have to make sure it is tied back to the foundation. If you get a piece of the foundation but not the whole, this takes something from the foundation they build on that. But what I see happening in our organization is that the whole principle of the foundation goes with every level that we build, and so there’s nothing lacking on any level or any branch or any outreach that we do. And to me, that’s extremely important.”

Chapter 13 Discussion Questions

- What is your vision? What is your mission? Are these obvious to the world? How?
- What are your values? Are they obvious to the world? How?
- What are the rituals and practices that show the world who you are and what you value?
- How tangible is your culture?

Chapter 13 Reflection Questions

- How do you feel the culture of your group of changemakers impacts you?
- What is something about that culture to which you respond?
- What is your responsibility for growing this or changing this?

Chapter 14: Change Management Life Hacks

Change is often met with resistance.

It never fails to surprise us how bad behaviour—even sabotage—can emerge when change is on the table. It's almost a reflex, often driven by the vocal few who represent just 1-2% of the decision-making team but make the most noise.

What makes it harder is that the sabotage often comes from those closest to us, people we never expected. They likely don't even realize their actions are undermining progress.

This resistance can surface in any community, and it's a natural challenge you need to be ready for.

From the Team: Alana, Operations Manager

“You don't need your MBA to make a difference. You need your heart on your sleeve and your community. You need to talk to people and tell your story. You don't make people's dreams come true by staying inside the box of what is expected. You make people's dreams come true by going outside of the box and not waiting for people to give you permission to do it. You impress people by going outside of the box and challenging the norm; when in your life have you liked ‘yes men’?”

“

Companies that change may survive, but companies that transform thrive. Change brings incremental or small-scale adaptations, while transformation brings great improvements that ripple through the future of an organization.

- Nick Candito

Chapter 14 Discussion Questions

- What change is happening or has happened in your group of changemakers?
- Which change management life hacks resonate with you?
- What are the areas for improvement or experimentation?

Chapter 14 Reflection Questions

- Many change management life hacks are tied to values and leadership skills.
- Where in this area do you feel confident?
- Where do you feel tentative or uncomfortable?
- Where can you lean in?

Chapter 15: The First 12 Months

Taking a leap into the unknown is like beginning of strengthening a muscle—we only get better and more confident as we do it. The same applies to experimentation—practice makes perfect.

This book tells only 1/3 of the story of the ups and downs that we experienced in our social acquisition journey. But it only tells 1/3 of the learnings (also called failures) from which we grew.

What if it was a regular practice to make a leap into the unknown? How would it affect your group of changemakers' impact on the world?



Failure should be our teacher, not our undertaker. It is delay, not defeat. It is a temporary detour, not a dead-end street.

William A. Ward

From the Team: Carla, CEO

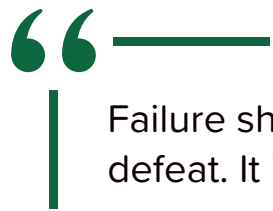
“What was the biggest mistake that we made? I wish that there was just one and I wish I could figure out which was the biggest! I think that the most important thing is that we started getting used to making mistakes and being resilient enough to move forward even when things felt impossible. Whenever something went wrong or we hit a new roadblock, we stopped panicking. The first three months I remember thinking that everything was a reason to panic. But a year later, we now just see the next roadblock and think, ‘That’s it?’”

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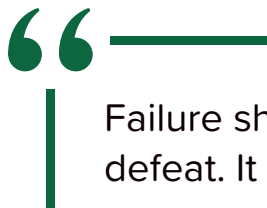
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everything was a reason to panic. But a year later, we now just see the next roadblock and think, ‘That’s it?’”

Chapter 15 Discussion Questions

- What would it look like to celebrate failures?
- What would it look like to normalize experiments?
- What might be possible with this new lens?

Chapter 15 Reflection Questions

- Imagine that you have been part of this journey with us. How would you feel now? How might you be looking at future opportunities? How might you dream differently?
- How could you embody that today?



Congratulations! You’ve finished Week 4!

What have you learned?

Resources and Conclusion

Now that you've read "Win-Win Capitalism" and completed this book study, use these resources to continue your learning journey.

Week One Resources

- [5 Critical Steps in the Change Management Process](#)
- [6 Ways to Create a Culture of Innovation in Your Church](#)
- [Abundance Mindset: Leading from a Place of Possibility](#)
- [Don't Let Fear Hold You Back – Use It to Push You Forward](#)
- [What is a SWOT Analysis?](#)

Week Two Resources

- [A Beginner's Guide to Systems Change](#)
- [Social Acquisitions Primer](#)
- [What is Social Enterprise?](#)
- [Are You a Transactional or a Relational Entrepreneur?](#)

Week Three Resources

- [10 Tips for Effective Communication in the Workplace](#)
- [Breaking Free from Analysis Paralysis: Strategies for Decision-Making](#)
- [How to Overcome a Fear of Failure](#)
- [What is Active Listening and How Can You Improve This Key Skill?](#)

Week Four Resources

- [10 Tips for Effective Change Management That Put Your Team First](#)
- [5 Change Management Hacks to Drive Nonprofit Growth](#)
- [Leading Change? Expect the Saboteur to Show Up](#)
- [10 Reasons Why People Resist Change](#)

Conclusion

We hope that you've enjoyed "Win-Win Capitalism" and this companion study, and that you've learned a lot to take back to your group of changemakers !

Please [visit our website](#) and contact us if you have any questions, or if we can support you or someone in your family. We love what we do and would be happy to help any way that we can!

