



ACCESS
SHARED SERVICES

Annual Report

Prepared By :

Danielle Hastings

Presented By :

Corinne Remple

Graeme Dearden

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www.sharedservices.coop

About Us

In May 2021, the Government of Alberta provided the Alberta Community Co-operative Association (ACCA) funding through the Civil Society Fund. ACCA and its Executive Member Associations: Volunteer Alberta (VA), Econocoop and British Columbia Co-operative Association (BCCA), worked collaboratively to launch ACCESS. Their primary outcome is to build equitable access to qualified, co-aligned professional service providers through strategic collaboration with regional, provincial & national partners.

Allied Community and Co-operative Shared Services (ACCESS) is a shared service nonprofit co-operative specifically formed to provide professional administrative back-office support for social purpose organizations, including co-ops, nonprofits, charities, childcare centres and social enterprises across Canada. It is an innovative, collaborative solution that fills service gaps and increases efficiencies, allowing social purpose organizations to focus on what they do best.

www.shareservices.coop



Our Vision

Collaborative and well-resourced nonprofit, cooperative, and social enterprise organizations strengthened through shared services.



Our Mission



Building a team of specialized service providers to share among nonprofits, co-ops, and social enterprises – reducing organizational pressures and filling operational gaps.

Our Values

Accessibility:

We provide equitable access to specialized services at a reasonable price.

Alignment:

We understand the needs of nonprofits, co-ops, and social enterprises and find service providers to meet those needs.

Collaboration:

We are non-competitive by default. We uphold, encourage, and facilitate collaboration in the sector.

Efficiency:

Guided by a vision of abundance and possibility, we help leverage organizations' combined demand and resources to increase efficiencies.

Integrity:

We act with integrity to build and maintain trusting relationships with our members, stakeholders, and the sector as a whole.

Quality:

We provide qualified, professional, and specialized services.

For-profit companies have long recognized the value of shared services.

Now social purpose organizations are looking for the same benefits.



Our Team

We believe in people and building meaningful bonds and are growing a team of experts and thought leaders - coming aboard means joining the family. We are the wearer of many hats, helping social purpose organizations like yours grow.



Corinne Remple

Director of Shared Services/Board



Graeme Dearden

Board of Directors



Patrice Gauthier

Board of Directors



Danielle Hastings

Operations & Member Services Manager

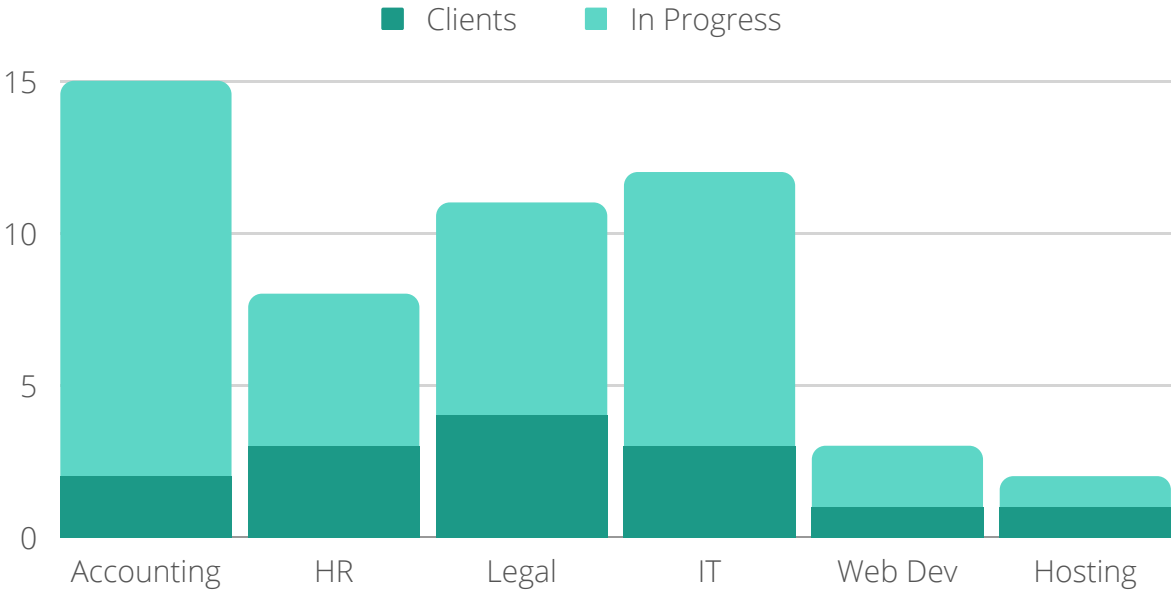


Naushad Velani

Finance Manager

A Year in Review

In 2022, a cross-sector team gathered to develop a nonprofit shared services co-operative model. Our goal was to offer professional administrative back-office support for civil society organizations through Allied Community & Co-operative Shared Services or ACCESS.



Over the past year, the ACCESS Operations Team worked tirelessly behind the scenes with project partners ACCA, BCCA, Econocoop, and Econocoop to launch a new shared services platform. Putting the 6th Co-operative Principle - Cooperation among Co-operatives - into action, ACCESS offers a team of specialized service providers to share among nonprofits, co-ops, and social enterprises – reducing organizational pressures and filling operational gaps.

ACCESS was federally registered as a nonprofit co-operative in February 2022. We also soft-launched our phase one services - Accounting, Legal and Managed IT. By the end of February, we had onboarded our first client for Managed IT services. With Service Providers and Clients to manage, we quickly recognized the need for a CRM to ensure we had a step-by-step guide for the process.

ACCESS was registered as a co-operative with the province of Alberta in May 2022. By June, we had secured our first accounting client. However, we soon realized that the excitement for our project was quickly exceeding our small team's ability to deliver.

To relieve some of the pressure the team was under, we hired an Operations & Member Services Manager to support the growth and development of ACCESS. We then paused to audit our current operations. What was working well? What needed to be revised? With our gained experience, we developed a strategic plan to guide the way, catapulting our team into action!

Pausing to reflect, review, and reset was the right choice. As by October, our website sharedservices.coop was live. We also launched ACCESS on four social channels - [Facebook](#), [Instagram](#), [LinkedIn](#), and [Twitter](#). With a strong online presence and the right team to support continued growth, our phase one services went from the pilot phase to a hard launch.

In December, we had gained momentum and were ready to soft launch our phase two services - Human Resources, Website Hosting, and Website Development. We ended 2022 with a strong group of professional service providers; ten clients were onboarded to receive services, multiple clients were referred for legal services, and many others were in various stages of the onboarding process.

Strength in Community through Collaboration



Summary

Accessibility, alignment, and flexibility are key to developing our new services. We endeavour to build, seek and adapt to feedback from our potential and current clients - members' inquiries and suggestions are essential to the ACCESS team.

2022 was a year of progress. ACCESS moved from an inspired idea to a registered nonprofit co-operative providing back-office administrative and professional services to various social purpose organizations. Clients of ACCESS benefit from service providers with a breadth of experience and qualifications working with organizations like their own. Streamlining the organization's operations and relieving pressure so it can deliver on its core missions.

After a year of development, pilots, and recalibration, team ACCESS is proud to support social purpose organizations across Western Canada. We now provide six services - Accounting, Human Resources, Legal, Managed IT, Website Development, and Website Hosting - plus more services to come in 2023.

We encourage you to follow us on our social channels to stay in the know on all things ACCESS!

What Next?

At team ACCESS, we are excited about what the future holds. As we work to expand our relationships, roll out our services in more provinces, and add services to our platform; the room for growth knows no limits.



Work Together. Smarter.

Interested in connecting with ACCESS to provide support or learn more?

Please email us to determine how we can work together.

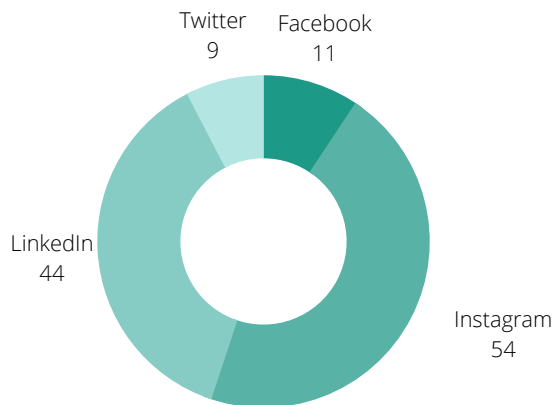
Would you like to obtain services through ACCESS?

Please visit our website and submit a Client Intake & Inquiry Form.

Know a Service Provider wanting who should join our team?

Please visit our website and submit a Service Provider Inquiry Form.

Social Channel Followers



250-800-0703



access@sharedservices.coop



www.sharedservices.coop



facebook.com/accesssharedservices/



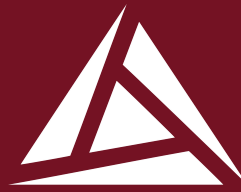
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ACCESS
SHARED SERVICES

2022 Financial Report

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Danielle Hastings

Presented By :

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Summary of Financial Performance

For the months March 2022 to February 2023

In March 2022, the first three services are launched through a pilot offering. Initial services included Bookkeeping, Managed IT & Legal. Our first three clients are signed or referred to legal services.



The transition from concept to service provision identifies several gaps in our internal operations - including onboarding. In July 2022, the team paused active client recruitment to provide the necessary time to refine our processes. Website build begins in September.



The re-launch of services and select marketing began in October 2022 to coincide with Co-op week. The team presents ACCESS at a provincial conference in Alberta and attends a second conference in Vancouver to promote the project and canvas potential clients. A few clients and service providers are signed, allowing the team to test expanded onboarding processes.



In December, website development, website hosting & HR services are added. In January 2023, an extension with the Civil Society Fund was requested and received. Eight client inquiries are received this month. Part-time client services rep hired to help process and onboard new clients.



Corinne Remple
Board, Director of Shared Services

Financial Report

To January 2023

	Budget	FY'22	Balance
Revenue	\$500,000	\$447,245	\$127,044
Civil Society Fund	\$500,000	\$437,500	\$62,500
Revenue for Services	\$0	\$9,745	-
Surplus from FY'22	-	-	\$64,544
Expenses	\$500,000	\$382,701	\$122,187
Administration	\$32,500	-\$23,660	\$8,840
Staff	\$240,950	-\$225,457	\$15,493
Staff Training	\$0	\$0	\$0
Travel	\$5,000	-\$4,774	\$226
Capital Assets	\$4,200	-\$630	\$3,570
Supplies	\$2,500	-\$2,679	-\$179
Promotion	\$12,500	-\$8,756	\$3,744
Rent/Utilities	\$8,500	-\$4,250	\$4,250
Evaluation	\$6,000	-\$500	\$5,500
Business Plan & SS Dev	\$12,250	-\$12,899	-\$649
Legal Advice	\$22,100	-\$11,543	\$10,558
Accounting Advice	\$16,050	-\$2,262	\$13,788
Staff Secondment	\$137,450	-\$80,404	\$57,046
Service Expenses	\$0	-\$4,887	\$0
Total	\$0	\$64,544	\$4,857



ACCESS
SHAREDSERVICES.COOP

16/February/2023

8429 – 24 Street,
Alberta T6P 1L3
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February 21, 2023

Explanation of ACCESS' Lack of Current Tax Filings

ACCESS was officially incorporated on Feb. 4, 2022, meaning that ACCESS still needs to file its first official tax return. Before this incorporation, ACCESS was operating as a project of the Alberta Community and Co-operative Association, Volunteer Alberta, and Econocoop, but it wasn't yet incorporated. ACCESS' initial funding from the Government of Alberta's Civil Society Fund was managed using a managed service agreement through The Alberta Community and Co-operative Association.

If approved for the CSRF, we can submit tax filings as requested once the first year's tax filings are submitted after June 2023.

Signed,

Naushad Velani

Finance Manager - ACCESS

finance@sharedservices.coop

Strength in community through collaboration.

INTRODUCING ACCESS

SHAREDSERVICES.COOP



funded by:



EXECUTIVE SUMMARY

Overview

Guided by the 6th Co-operative Principle, Allied Community & Co-operative Shared Services, known as ACCESS, offers back-office professional support and the power of group-buying through a collective of service providers who understand the unique needs of social purpose organizations across Canada.

ACCESS aims to provide professional services and products for its members at a total cost less than the combined expenses of individual members buying or delivering themselves. Savings are captured through lower administrative costs, quantity purchasing discounts, and assured business levels with vendors and suppliers. Clients can increase their effectiveness and efficiency by purchasing products or acquiring services through ACCESS's collective of aligned providers.



Our Mission

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Our Vision

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Let's Connect

-  250.800.0703
-  sharedservices.coop
-  access@sharedservices.coop

Who should become an Executive Member?

Any member-based social purpose association can apply to become an Executive Member.

As an Executive Member of ACCESS, your members or members of your member-based associations can obtain services.

Organizations without a defined member association are encouraged to contact us.

As our membership grows, so too will our potential client base. Our current members



Trends in our client base include SPOs that are;

- Seeking an external service provider
- Lacking in-house skills to manage the services
- Looking to build capacity with minimal operational or budgetary impact
- Unsatisfied with their current provider

Problem ACCESS Solves

Social purpose organizations (SPOs) across Canada face the challenge of stretching resources to cover operational, financial and managerial needs and attain experienced, aligned service providers on an as-needed or ongoing basis. Many service providers are unaware of the unique problems these social-purpose organizations face and may not have the flexibility to offer services to a small organization that needs minimal work hours.

The ACCESS Solution

ACCESS is a versatile practical model to provide effective and efficient business solutions at a level that an organization cannot provide for itself. ACCESS brings this model to the social good market - co-operatives, nonprofits, childcare centres, charities and social enterprises - across Canada. It is an innovative, collaborative solution that fills service gaps and increases efficiencies, allowing social purpose organizations to focus on what they do best.

ACCESS Shared Services

ACCESS is proud to support social purpose organizations across Western Canada. Six services are currently available:

- Accounting
- Cybersecurity
- Human Resources
- Managed IT
- Website Development
- Website Hosting.

Plus, more services are launching soon, including marketing, benefits, insurance, a pension plan, and group buying.

Tell me More!

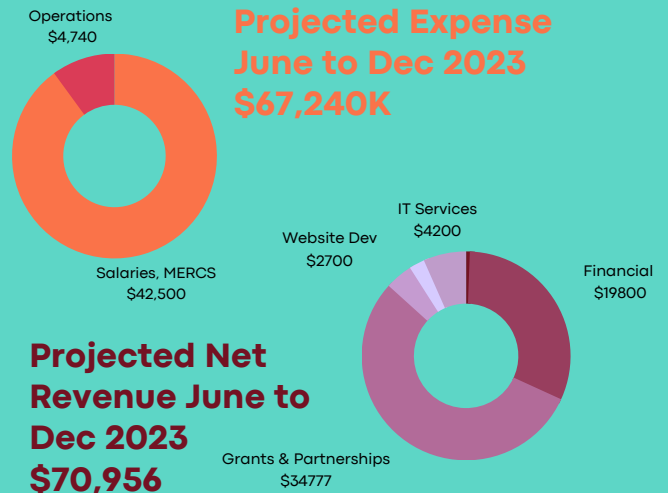
- ☎ 250.800.0703
- 🌐 sharedservices.coop
- ✉ access@sharedservices.coop



Steps Forward

Funding is sought to support operating expenses, including marketing and sales, to take ACCESS to the next level. We are developing an equity pool to support deserving organizations that would benefit from our professional services for a reduced cost. The ACCESS team will introduce five more services in 2023 to supplement our current services.

We continue to expand our Executive Membership and seek avenues to support their work.



Meet the Team



Graeme Dearden
Governance,
Funding & Grants



Corinne Remple
Project Lead
Service Development



Danielle Hastings
Operations &
Member Services



Naushad Velani
Finance

