

BLOOM FUNDING

ANNUAL



REPORT

bloom

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Message from the CEOs

Stakeholders, partners, and community members,

As we reflect on the last year, we are filled with gratitude and pride for the strides Bloom Funding has made. Our commitment to empowering organizations through tangible strategies has yielded remarkable outcomes, reinforcing our belief in the power of collaboration and innovation. We are proud of the work the Bloom Funding team has accomplished and the community impact achieved. We are in awe of the innovation of our clients and are honoured to play a small role in the success of their work.



2024-2025 Strategic Goals

This year, we set out to:

- ✔ Strengthen Our Team and Culture – Foster employee retention, engagement, and continuous learning through wellness initiatives, flexible work policies, and professional development opportunities.
- ✔ Expand Market Presence and Client Relationships – Build brand recognition, deepen client trust, and create partnerships that extend our reach across Atlantic Canada and beyond.
- ✔ Enhance Operational Efficiency and Growth – Streamline core processes, standardize SOPs, and leverage technology to deliver services more effectively.

Rooted in Community

At Bloom Funding, we empower businesses and nonprofits to access funding, scale innovative initiatives, and elevate their social and environmental impact. With our hands-on guidance, organizations can diversify revenue streams, maximize SR&ED refunds, and align business goals with social and environmental sustainability.



Values

- ✓ Community Building
- ✓ Active Listening and Proactivity
- ✓ Transparency

- ✓ Respect for Priorities
- ✓ Professional Solutions
- ✓ Confidentiality

Land Acknowledgement

Bloom Funding respectfully acknowledges that we work and live on the traditional and unceded territory of the Wolastoqiyik, Mi'kmaq, and Peskotomuhkati peoples. We honour the enduring connection of these communities to this land and recognize that reconciliation is an ongoing journey - a shared responsibility for all of us. We remain committed to deepening our understanding of Indigenous resource stewardship and integrating Indigenous frames of knowledge into our environmental and social sustainability practices, as we move forward.

Performance Highlights and Impact



Launched Impact
Playbook
Newsletter



7 New Strategic
Partnerships



Featured in
Atlantic Business
Magazine



Donated to local
Indigenous
Language School
and CYC



100% staff would
recommend Bloom as a
place to work



100% staff
feel like they
belong at
Bloom



Introduced 5%
RRSP Matching



Certified LGBT+
business by
CGLCC



Excellence in
Business
Canada Award
Recipient



76 Paid Volunteer
Hours in
Community

Measuring our Impact

NuMetric is an innovative tool developed in partnership with The Decency Foundation. Specifically designed for small and medium-sized organizations, NuMetric provides measurable indicators to elevate social and environmental impact. Bloom Funding has conducted an internal NuMetric Assessment over the last 2 fiscal years.



Bloom's NuMetric Assessment

Over the last 12 months Bloom's Numetric assessment has increased by 22.73. Here's some of what we implemented:

- ✓ *Equity, diversity, and inclusion statement*
Reinforces our commitment to an inclusive and representative workplace
- ✓ *Employee feedback survey*
Collects staff insights to guide improvements and enhance experience
- ✓ *Bi-annual townhalls*
Open forums to share updates, celebrate progress, and encourage dialogue
- ✓ *Vendor checklist*
Ensures partners align with our values in ethics, sustainability, and equity
- ✓ *Annual donation program*
Supports community organizations and fosters a culture of giving
- ✓ *E-waste policy*
Ensures electronic materials are recycled

SR&ED Highlights

Bloom Funding reaffirmed its position as a leading expert in Scientific Research & Experimental Development (SR&ED) tax incentive advisory. Our team successfully supported a growing number of innovative Canadian businesses in identifying and submitting high-impact claims, resulting in millions of dollars in returns reinvested into R&D and growth. Our reach has grown across Canada.



With a commitment to accuracy, compliance, and client success, Bloom maintained Net Promoter Score of 92.86 and deepened partnerships across sectors including technology, life sciences, and clean energy. Our continued investment in process optimization ensures clients receive not only maximum value from their claims and the capability to scale their innovation.

"We didn't think we would be eligible for SR&ED Credits, the team at Bloom helped us find over \$60k in credits and the application was done with just a couple hours of my time. I can't recommend them enough."

**Marcel Petitpas, Chief Executive Officer,
Parakeeto**



Fundraising Highlights

Bloom Funding's fundraising services have grown since launching in 2022. Bloom has raised over \$3.5 million for its nonprofit clients through campaigns, appeals, sponsorship, and donor stewardship. We focus on training so nonprofit organizations can keep benefitting from our services long after the partnership is complete.

CYC Capital Campaign

Centre for Youth Care has partnered with Bloom on its capital campaign to build supportive housing for youth ages 19-25 (construction started in summer 2025). This housing resource will address a critical gap in services for youth who "age out" of care at 19 and are at higher risk of entering homelessness.



\$2.7
million
raised for CYC

"Working with Bloom made a real difference for Science East. Thanks to their deep understanding of fundraising for community-focused organizations, we were able to reach out to new partners with confidence and quickly build capacity. Their knowledge and support have been invaluable as we work to ensure our future in delivering hands-on science education in New Brunswick."

Jennifer MacDonnell

Executive Director, Science East



Sustainability Highlights

This year we officially launched our sustainability services, supporting businesses, nonprofits, and our first municipality with their social and environmental impact.

Participant highlights include:

- ✔ Completing the B Corp Impact Assessment
- ✔ Conducting a financial risk assessment of organizational assets
- ✔ Developing and implementing new SOPs to streamline operations
- ✔ Determining impact metrics for accurate investor and stakeholder reporting

Municipal Sustainability work:

Bloom Funding is proud to support the Urban Heat Island Assessment in Saint John, helping local partners turn data into action. By securing resources and guiding measurement, we are ensuring the initiative can both map urban heat impacts and design practical solutions for vulnerable communities. This project reflects our belief that sustainability work must not only identify problems but also empower communities to build lasting, climate-resilient change.

"Bloom's Sustainability Bootcamp is one of the best professional development experiences I have had in a long time. It paired a well-organized program design delivered by talented presenters and coaches with focused coursework that helped me advance a specific sustainability discussion and initiative at my organization. It also brought together a small group of diverse organizational leaders and entrepreneurs, creating a learning environment that was engaging, supportive and productive."

Kim Follett, CEO, Play & Learn



Growing together

As we start on a new year, we have taken time to reflect on how much we have grown and how grateful we are for the people who have been part of that journey. What excites us most is not just what we have accomplished, but what lies ahead.

In 2025–2026, we are looking forward to new ideas, deeper relationships, and the chance to keep building something meaningful, together.



Looking ahead to the next 12 Months

- ✓ Achieve B Corp Certification - formalize our commitment to purpose-driven growth
- ✓ Launch Bloom's Impact Podcast - amplify stories of innovation and impact
- ✓ Invest in Lifelong Learning - Coursera access for every team member
- ✓ Expand Our Impact - raise \$30M+ in funding for clients
- ✓ Grow Our Reach - 2 new Sustainability Bootcamps and broader SR&ED services
- ✓ Strengthen Partnerships - collaborate with at least 5 new organizations

We are excited about the journey ahead and remain committed to building lasting impact together with the clients and partners who make this work possible. Thank you for being part of our story.