



**JASON WIENER|P.C., A PUBLIC  
BENEFIT CORPORATION**

# **PUBLIC BENEFIT REPORT**

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# ABOUT THE FIRM

Jason Wiener|p.c. ("JWPC") is proud to be Colorado's first Public Benefit Corporation to become a certified B Corp. With roots in the justice, solidarity, labor, and conservation movements, we started this firm in 2014 as our platform to work with our clients as collaborators and partners in our mission to make an impact.

We are a social enterprise legal and business consulting firm for mission-driven companies. We bring structural legal and financial design to business ownership, fundraising, and operations. We think creatively about how to harness democratic business models to advance social, economic, & environmental change.

Our intention at JWPC is to work within the capitalist system that we inherited to maximize opportunities for wealth creation and income growth not just for the privileged few, but for all, by using "market-based" enterprise models, with a specific emphasis on cooperatives.

We seek to develop deep and lasting relationships with our clients by getting to know their culture and vision, meeting with key staff and informal leaders, and striving to provide customized, efficient, and dynamic advice. We collaborate with clients to solve problems and provide accessible and responsive client service.

FIND OUT MORE



# MESSAGE FROM JASON

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Each year I have the honor to reflect on our organization's work in the prior year, and how that work fit into the broader social, economic, and environmental context. As someone who is more prone to optimism, inspiration, and resilience, I am often drawn to the challenges as tell-tale signs of strength and health.

2021 for the Jason Wiener|p.c. ("JWPC") team began as a period of rebuilding; a Third Act. We had endured difficult turnover at the end of 2020. We made a series of changes in our team and welcomed Jacqueline Radebaugh as a new Associate. We promoted Jessica Denny to the role of Director of Operations. We expanded and refined our Anti-Oppression Client Services Program. We began planning the development, pilot, and launch of an ambitious and cutting edge Community Enterprise Legal Design program. We codified the JWPC norms into a form that is now attached to all Engagement Letters and guides all of our work.

I'm extraordinarily proud of the manner, ethic, and purpose of the JWPC work and all we accomplished in 2021. Here are a few of my favorites: we published 16 blog posts; contributed more than 275 pro bono hours; offered clients more than \$3,400 in racial equity discounts; supported 189 clients; and maintained gender pay parity relative to revenue generated. 2021 by the numbers (more below) tell a story of shared purpose, steadiness, and continued commitment to the core values, norms, and principles upon which JWPC was founded. Out of struggle emerged wisdom and strength. Out of grief emerged light. And, lots of laughter. We worked hard to not take ourselves too seriously and to laugh whenever possible.

Now in 2022, I look back on 2021 as the year we went back to basics, to sure up the foundation and prepare ourselves for emergence, growth, and opportunity. 2022 has already shown us this preparation was valuable. I am proud of the JWPC team, I am inspired by our clients, and I am honored by our contributions.

Warmly,

**Jason Wiener**

# FIRM VALUES

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Our firm values speak to our underlying intent and core principles.



## 01 — Timeliness & Responsiveness

We strive to provide meaningful responses in a timely fashion. You will always rest assured that your matter is receiving the attention it needs and that you will receive a timely response, even if just a personalized confirmation of receipt.



## 02 — Mission Matters

Your matter will never be reduced to a wrought task and you will never receive one-size-fits-all advice. We strive to provide tailored counsel that seamlessly incorporates your organization's mission and values. Your mission will always remain top of mind in our dealings and we will always advise you of potential threats to your mission.



## 03 — Open Communication

We will communicate openly and candidly with you and we expect the same in return. Nothing is gained in our trust-based relationship if you do not feel you can be open or if do not feel you are receiving candid feedback. While always respecting the sensitivity and confidentiality of your matter, we will encourage you to openly communicate with your organization's stakeholder.



## 04 — Entrepreneurship

We strive to work with entrepreneurial people who want to create positive impact for the world. We respect entrepreneurs who are willing to think big, act boldly, and strive to change the world. To that end, we will strive to bring cutting edge solutions to your matter. We will counsel you through the ins and outs, the risks and rewards of new approaches and intrepid strategies. We will navigate risk as a team.

# FIRM VALUES, CONT.

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## 05 — Transparency

We strive to provide transparency with respect to all aspects of our work together. You will know where we are in a given process and what steps lay ahead. We will do everything possible to avoid surprises.



## 06 — Ethical Business Practices

We strive to be a sounding board for your decision making, whether legal, strategic, or otherwise. We will counsel you through the process of ethical decision making with compassion, an open and non-judgmental mind, and objective reason.



## 07 — Respect

We will communicate openly and candidly with you and we expect the same in return. Nothing is gained in our trust-based relationship if you do not feel you can be open or if do not feel you are receiving candid feedback. While always respecting the sensitivity and confidentiality of your matter, we will encourage you to openly communicate with your organization's stakeholder.



## 08 — Democratization

When practical and appropriate, we will advise you as to innovative ways to democratize elements of your organization. In governance, capital, supply, credit, finance, and other business issues, we will help you evaluate creative ways of distributing and sharing management, decision-making, control, wealth, and risk management. To the extent meaningful to you and your stakeholders, we will help you maximize your role in building regenerative economies and communities.

# FIRM NORMS

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Our firm values speak to our underlying intent and core principles. How we carry these values out in our work and in our professional relationships is guided by newly developed norms. These norms provide the context and framework for our interactions and communication with colleagues, clients, partners and other firm stakeholders. These are statements of conduct and communication that we expect of others and that we intend to honor for ourselves.



## 01 — Positivity

We enter all interactions with a positive intention and assume the same positive intent of those we interact with. We act with integrity and intention and invite others to join us in upholding shared values. We strive to offer others the benefit of the doubt about their intentions and motivations. This deliberate stance to seek the best in others is balanced with many years of pragmatic vigilance for the interests of our clients and the movements we serve.



## 02 — Spirit of Inquiry

We ask questions and encourage others to do so. The only way to know, learn, and understand another person's position and point of view is to ask. Simple questions signify that a person is curious, conscientious, and engaged. We ask questions to deepen our understanding, to build empathy, and to engage in effective problem solving. We do not ask questions to debate lived experiences or assert dominance.



## 03 — Equitable Access to the Law

We are committed to expanding affordable and equitable access to legal services. The law provides an invisible infrastructure (and sometimes barrier) which shapes business, relationships, and society. Making progress towards equity and justice requires access to capable, creative, and principled legal advisors. We help make this possible by running a lean operation that prioritizes people over profits, by providing pro bono counsel, and by supporting other organizations that advance this cause.

# NORMS, CONT.

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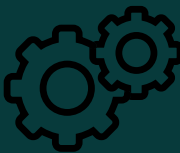
## 04 — Anti-Oppression

We expect to be held accountable and we will do the same when faced with discrimination, prejudice, or bias, explicit or implicit, inadvertent or deliberate. We are committed to dismantling systems of oppression and re-building a more just and equitable socio-economic system. We recognize that this requires that we confront difficult habits, patterns, and blind spots in ourselves and that we ask our clients and stakeholders to do the same.



## 05 — Work Style

We believe in working collaboratively with clients in an open, timely, and effective manner. We ask that our clients agree to uphold these norms and hold us accountable for our commitment to them. To deliver the best possible services to clients we must be able to count on each other to provide timely responses and produce deliverables on agreed upon timelines.

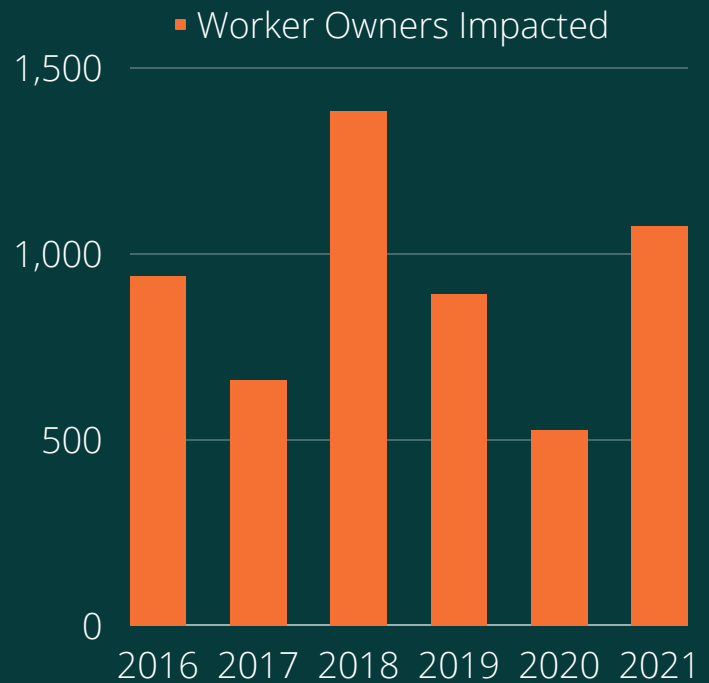
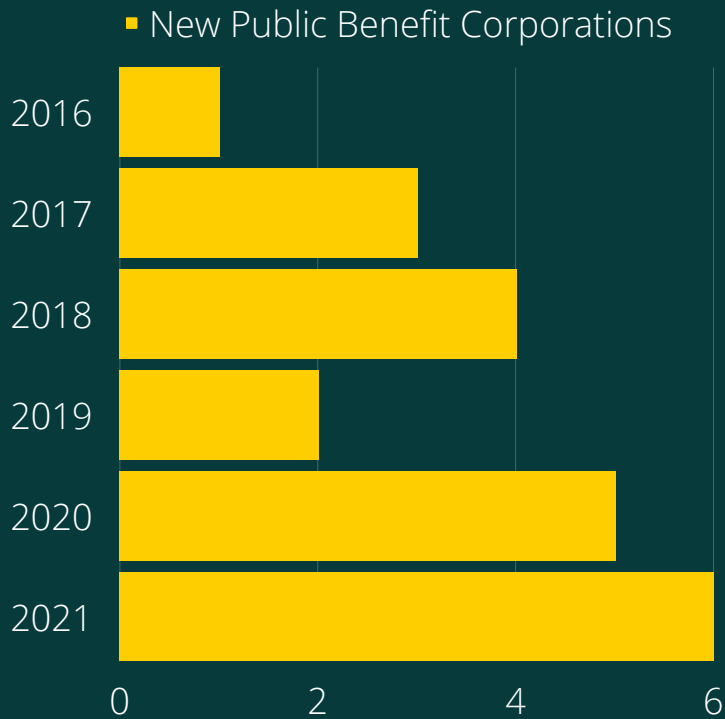


## 06 — “Show Your Work”-Sheena Wadhawan, AORTA

We work, experiment, fail, and succeed publicly. We make our intentions known and we are open about our reasoning and our work process. We bust open the black box as a means to be transparent, to educate, and to empower. We expect our clients and partners to do the same with us. We will not be offended being asked “why?” we did something a certain way, we encourage it in fact.



# CLIENT METRICS

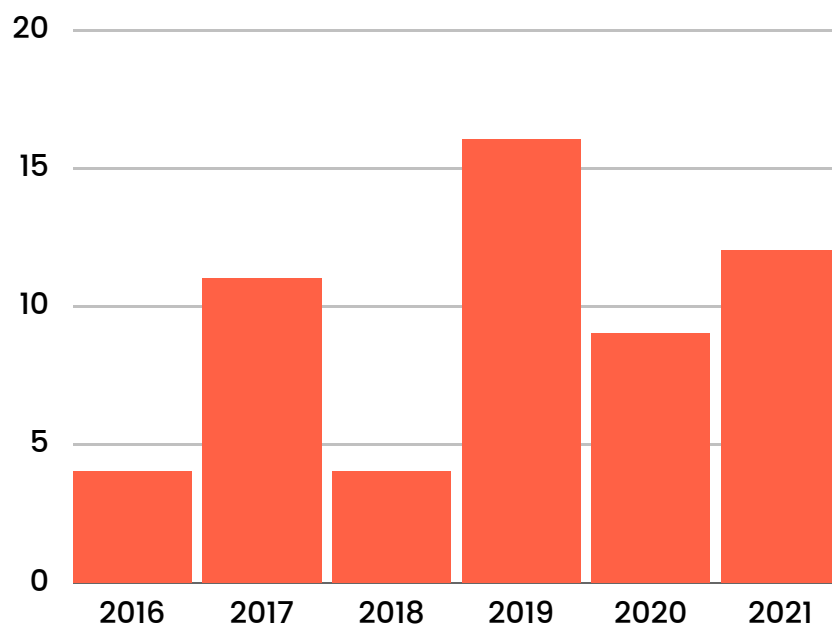


**12 NEW**  
**COOPS**

**~66%** OF ALL CURRENT BUSINESS OWNERS ARE SET TO RETIRE WITHIN THE THE NEXT TEN YEARS

Over time, businesses need to change form for a variety of reasons. The most common transition that we are asked about involves selling a business to employees or other key stakeholders. In 2021, we assisted with 12 socially responsible organizational recapitalization and employee-ownership conversions.

## **JWPC ASSISTED EMPLOYEE OWNERSHIP CONVERSIONS**



In December 2020, Jason Wiener was appointed Chair of the Colorado Employee Ownership Office by Governor Jared Polis.

A note about Jason from the EO Office,

"His work has been essential in the progress our commission has made and the momentum we have grown. Jason, thank you for all of your contributions and we so look forward to continue working with you."



**FIND OUT MORE ABOUT THE COLORADO  
EMPLOYEE OWNERSHIP OFFICE**

# FIRM HIGHLIGHTS

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## ENGAGEMENT

We participated in speaking engagements promoting cooperatives, social enterprise, and socially responsible capital/financing strategies reaching approximately 3,887 listeners.



## CHARITABLE DONATIONS

In 2021, the firm continued to support charitable organizations by donating 1% of our gross revenue to mission-aligned groups and projects.



## FEMALE

Last year, 63% of our total revenue was generated by female identifying attorneys.



## PRO BONO

Last year, our attorneys contributed more than 275 pro bono hours.

# JWPC'S COMMUNITY ENTERPRISE LEGAL DESIGN COURSE

**Learn more &  
Register here!**

Thank you JWPC for piloting your course with Germ Network! We so appreciated the opportunity to think through our goals, milestones, and legal design with your attorneys. We came to JWPC with a desire to create a social media platform that shares the value it produces with the workers and users who produce that value. After surveying the growing community of folks and organizations supporting like-minded businesses, we approached JWPC because it became clear to us that hard-nosed legal knowledge was the key differentiator in the guidance we needed as we sought to define our formation and fundraising plans. Your course content introduced us to the legal constraints and affordances of a wide range of entity types, including cooperative models. You helped us think through a legal design that could combine shared power and ownership with a traditional legal structure that can still access growth capital. The combination of readings, video lectures, and group sessions helped us dig into the legal options available and talk through our reactions together.

Even though Jason and the whole firm are committed to distributed power and shared ownership, you were always pragmatic and client-centered—your goal was always to make sure we understood our options so that we could make decisions that were right for us. Your careful attention, breadth of legal knowledge, and experience with a range of businesses and entity types made you the perfect teachers for this moment, as we pursue formation. We're a new business with big dreams, and you were able to think through exciting future possibilities with us while also helping us stay grounded in appropriate and responsible short-term decisions and formations. And of course, we appreciated your friendliness and availability throughout our engagement. Thank you for your support at this crucial time!

Tessa Brown, Harika Vajjala, Brett Duboff, original co-founders of Germ Network



# OUR AMAZING CLIENTS



**National Black Women's**  
CREATIVE COOPERATIVE

National Black Women's Creative Cooperative is a worker-owned limited liability cooperative and mutual aid network of Black women creatives. Our mission is to liberate Black Women from oppressive and toxic work environments and generate wealth owned and stewarded by and for us toward a goal of political and financial freedom.

The National Black Women's Creative Cooperative is born of an Unlock Creative Coaching and Management LLC initiative, Creative Flowers, that focuses specifically on growing, nurturing, and keeping Black women in leadership within the creative sector including the nonprofit arts and the commercial entertainment industry. We define the creative sector broadly as the arts, commercial film, music, and live entertainment industry, and nonprofit sector and is inclusive but not limited to visual arts, theater, dance, film, music, and culture bearing.

We have the honor and privilege to work with Lydia Edwards and Jason Wiener to actually create the foundation for the coop. Jason and Lydia advised on the type of entity and where to incorporate it. The firm takes care of our business registration.

Lydia got into the weeds with us for about 10 months working with our founding Board of Directors to create our by-laws and owner membership agreements and really educated us through the process.

I loved the compassion, care, and knowledge that they brought. It was easy to work with them logistically and just easy because of their good nature. Jessica has been awesome keeping on top of our paperwork and filings.

As we grow, we plan and hope to continue to work with JWPC.

Warmly,

Ashley Walden Davis, President



**Learn more about the  
coop & join HERE!**

# MEASURING PROGRESS

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Jason Wiener|p.c. is proud to be Colorado's first Public Benefit Corporation to become a certified B Corp. The B Corp certification is administered by B Lab, a nonprofit organization based in Pennsylvania. The B stands for "benefit," which refers to benefiting workers, the community and the environment. Jason Wiener|p.c. became a certified B Corp in 2015, joining over 1,200 certified B Corporations in over 120 industries in 40 different countries.

To qualify as a B Corp, a firm must have an explicit social or environmental mission, and a legally binding fiduciary responsibility to take into account the interests of workers, the community, and the environment as well as its shareholders. Additionally, B Corps must pay an annual fee based on revenues, biannually complete a B Impact Report (a rigorous assessment that measures social and environmental impact), meet B-Lab's comprehensive social and environmental performance standards, and make that B Impact Report public, in order to receive the certification from B Lab.

To become certified, each company must attain a score of 80 out of 200 points on the B Lab Assessment. Jason Wiener|p.c. earned a company score of 84.8 in the firm's 2019 Impact Assessment, placing it in the top 25% of all B Corp certified law firms.

## 2019 BIMPACT ASSESSMENT

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# OBSTACLES ENCOUNTERED

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Obstacles presented in 2021 evolved slightly from those reported in prior Public Benefit Reports.

While still nascent, impact finance, cooperatives, and social enterprise have matured noticeably over the past few years. Much of the formative work the JWPC team has done to develop new finance tools and form new entity structures has become more mainstream.

Non-extractive capital raising continues to be a challenge for clients. While slightly less niche, impact investors rely on traditional financial priorities when evaluating social enterprise concepts, structures, and financing terms. The perceived risk of cooperative entities, non-dilutive and non-extractive finance still presents too great a challenge for many investors to overcome. This has constrained access to capital for many of our clients, though we are seeing more and more novel financings materialize.

We experienced similar recruitment and hiring challenges as did many employers. We saw far fewer job applications for available postings, and, of those applications we did receive, we had a very limited pool of talent with applicable experience. Much of these challenges have already been addressed and have improved so far in 2022.

# TEAM

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Erika Dunyak, Associate Attorney

Sarina Larson, Administrative Specialist

Julian Hill, Of Counsel

Jason Wiener, Principal

Lydia Edwards, Of Counsel

Linda Phillips, Senior of Counsel

Martina Watson, Of Counsel

Yev Muchnik, Of Counsel

Jacqueline Radebaugh, Associate Attorney

Jessica Denny, Director of Operations

# CONTACT

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