

ENTERPRISING CHANGE

REPORT OF THE 2015
SOCIAL ENTERPRISE SURVEY
FOR ONTARIO



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Development Network
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Introduction

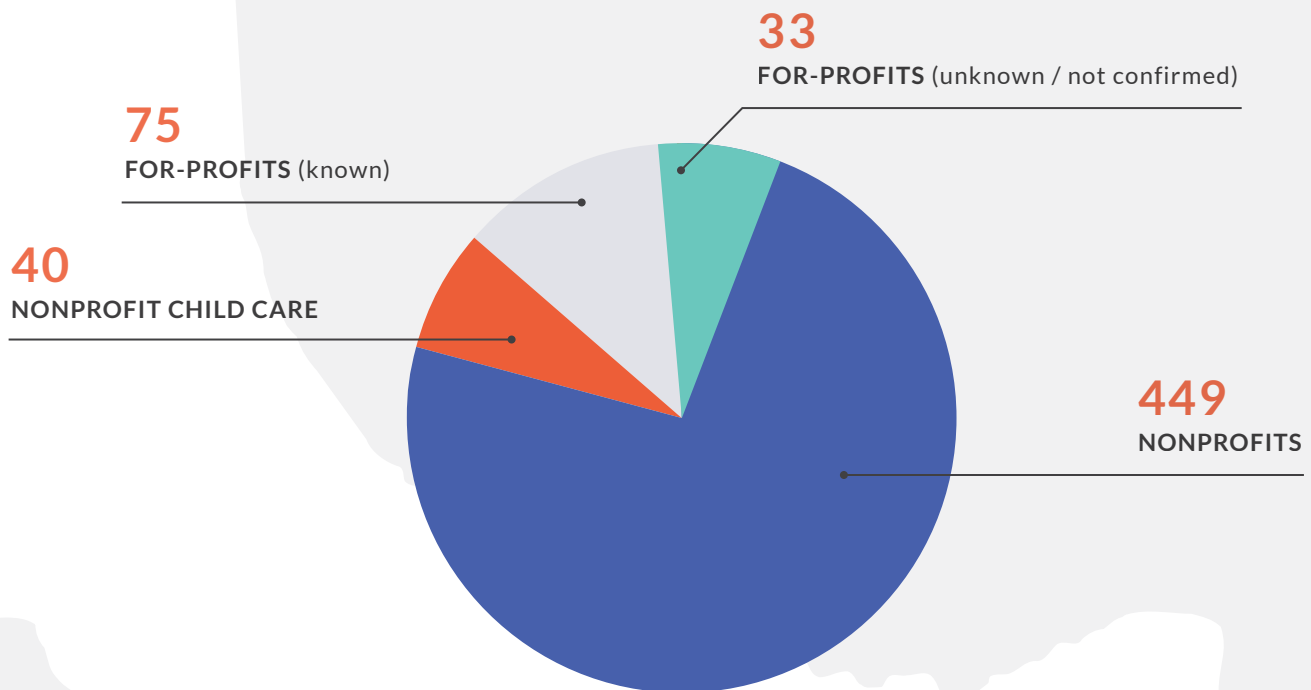
There has been a lot of talk about social enterprise (SE) over the last few years, with many ideas about what it is and what it means for the future of our communities. While there is no one definition of social enterprise, most agree it involves the combination of business-savvy market activity with the mission-focused purpose of the nonprofit/voluntary sector to bring about positive impact. From research and experience, we know that Ontarians have sought to achieve both economic and societal goals for community benefit.

The concept of doing good while earning a profit may not be new, but recent interest from politicians, academics, and community organizations has pushed social enterprise into the limelight. With the increasing number of socially-minded start-ups and the creation of the Office for Social Enterprise by the Government of Ontario, it is vital to have accurate and updated information about the social enterprise sector in this province. An enhanced understanding will enable policymakers, intermediaries and community stakeholders to better support the development of a social

economy that provides opportunities for employment and training as well as offer environmental, cultural and social benefits.

This is the purpose of the 2015 Social Enterprise Survey for Ontario: To provide a snapshot-in-time profile of this province's social enterprise sector, in order to increase awareness and inform actions to support its development.

This report builds on previous research that the Canadian CED Network (CCEDNet) conducted in 2012, titled '[Inspiring Innovation: the Size, Scope and Socioeconomic Impact of Nonprofit Social Enterprise in Ontario](#)'. It also contributes to the national profile being created through similar surveys which have been conducted across the country- so far British Columbia and Alberta have been surveyed three times; Manitoba, Nova Scotia and New Brunswick twice, and Prince Edward Island, Newfoundland/Labrador, Yukon, Nunavut and the Northwest Territories once. A survey is currently under development in Saskatchewan. All of these reports contribute to a better understanding of a national entrepreneurial movement within the nonprofit sector.

RESPONDING SOCIAL ENTERPRISES (N= 597)

The findings from this survey are based on the participation of 597 social enterprise respondents (nonprofit and for-profit combined). Some respondents are parent organizations managing multiple sites/businesses; when considering all sites separately the total count represents 1,271 entities.

This 2015 Ontario survey is unique in that it is the first in Canada to include for-profit social enterprises, as well as nonprofit child care and housing providers. This is an important step in recognizing the broad continuum of enterprises that contribute to Ontario's social economy.

The report begins with a background of Ontario's social economic climate and the momentum of social enterprise in particular. It presents an operational definition of

social enterprise as used in this survey and discusses the method and limitations of the research. Findings for nonprofit respondents are then presented in four overarching themes: Purpose & Structure, Economic Impact, Geographic Analysis and Challenges & Opportunities. Spotlights are presented for francophone, poverty and disability focused nonprofits, and this is followed by an examination of for-profit social enterprises. Finally, nonprofit child care providers are presented separately due to concerns about the comparability of data. The report concludes with a summary of key findings and recommendations for sector-building opportunities among policy makers and community stakeholders.

Key Findings

Note: Key Finding highlights do not differentiate specific respondent categories and therefore should not be cited in isolation. For a more detailed explanation of respondents represented in these highlights, refer to the specific sections listed in brackets. Unless otherwise noted, nonprofit social enterprise results do not include nonprofit child care respondents.

ONTARIO'S SOCIAL ENTERPRISES:

► Address Employment Barriers

Almost half of nonprofit respondents focus on assisting low income populations and one-fifth of them specifically train, employ or provide services to people living with physical, psychiatric or intellectual disabilities. Four-fifths of SEs with a poverty focus and over half of those with a disability focus include employment development in their mission. (See Poverty Focus and Disability Focus)

► Juggle Multiple Purposes

The majority of responding SEs (85%) identify with a social purpose. Nonprofit respondents tend to identify with a variety of purposes: over a third identify with having a cultural or environmental purpose. Almost half of for-profit respondents report having an environmental mission. (See Purpose & Structure and For-profit Social Enterprise Sector)

► Operate Across A Range Of Industries

Ontario's responding SEs are active in diverse sectors ranging from health and social services to trade and finance and food and tourism. Over half of for-profit respondents identify as multi-sector, with a greater focus on professional services (49%) and health and social services (45%) while nonprofit respondents centre more on trade and finance (36%), accommodation, food and tourism (34%), and real estate (33%). (See Purpose & Structure and For-profit Social Enterprise Sector)

► Work With Diverse Communities

Nearly half of nonprofit and one-quarter of for-profit responding SEs work with people with low incomes and most subsectors reported working with four or more distinct groups. About two-fifths of nonprofit respondents work with youth, women and families while almost half of for-profit respondents work with women. (See Groups Served, Employed or Trained by Social Enterprises , Average Number of Targeted Groups by Subsector, and For-profit Social Enterprise Sector)

► **Operate Under A Range Of Legal Structures**

Among nonprofit respondents, 42% identify as co-operatives; and just under half identify as registered charities. About one fifth of for-profit respondents identify with another legal structure such as B Corporation, original IP and limited liability partnership. (See Purpose & Structure and For-profit Social Enterprise Sector)

► **Create Jobs**

In 2014, Ontario's responding SEs employed a total of at least 14,000 people, including at least 7,500 full-time equivalent (FTE) employees, and paid out a total of at least \$252 million in wages and salaries. Responding SEs hired an average of 38 staff (18.5 FTE). Respondents aged 40 years and older hired more employees compared to younger enterprises. (See Economic Impact)

► **Are Well-Established And Increasing**

Almost three-quarters of responding social enterprise are 10 years or older, with over half operating for more than 20 years. Many new enterprises are also being developed. The majority of for-profit respondents are relatively new companies, with 57% operating less than three years. Sixty-six percent (66%) of nonprofit SEs with a poverty focus have been operating for three years or less. (See Purpose & Structure, Poverty Focus and For-profit Social Enterprise Sector)

► **Fight Poverty**

Nearly half (45%) of nonprofit SEs surveyed have a poverty focus. This is more common among younger social enterprises. Poverty-focused respondents are found to be less likely than other SEs to receive grants from all three levels of Canadian government. (See Poverty Focus)

► **Work Locally**

The majority of Ontario's responding SEs operate at the local/neighbourhood, city/town and regional levels. For-profit respondents are much more likely to work at larger scales, such as provincial, national and international levels. (See Geographic Scale and For-profit Social Enterprise Sector)

► **Contribute To Ontario's Economy**

In 2014, Ontario's responding SEs earned at least \$489 million in total revenues. About 78% of this came from the sale of goods and services. (See Economic Impact)

► **Are Distinctive In Francophone Communities**

In general, francophone and anglophone social enterprises are similar. However, there are a higher percentage of francophone respondents in rural communities and they are more likely to identify with a cultural purpose. They are also over five times as likely to consider repayable equity as a strategy for revenue growth (compared to anglophone enterprises). (See Francophone Focus)

► Engage Volunteers

In total, Ontario's responding SEs engage at least 25,000 volunteers; this includes at least 10,200 full-time volunteers. Nonprofit respondents have an average of almost four times as many total volunteers as for-profit respondents, with the older social enterprises (40+ years) engaging more than twice the number of volunteers on average (99) compared to the average for all of the nonprofits. (See Economic Impact)

► Are Building Financial Sustainability

Over three-quarters of nonprofit respondents reported breaking even in 2014, but only a little over half broke even without grants. On the other hand, just over half of for-profit respondents broke even in 2014, dropping to just above two fifths (42%) when grants are not counted. (See Economic Impact)

► Have Human And Financial Resource Challenges

Forty-two percent (42%) of responding nonprofits identify human resources as a moderate or significant challenge. Access to external capital is a major challenge as well, with 53% of nonprofit respondents and 81% of for-profit respondents citing access to grant capital as a moderate or significant barrier to their development. (See Challenges Highlights and For-profit Social Enterprise Sector)

► Differ In Rural And Urban Contexts

Rural respondents are more likely to operate as farmers' markets and arts and culture organizations; 73% of farmers' market respondents are in rural communities. Urban respondents are more likely to focus on employment development and housing. When considering top challenges, only urban respondents list legal and regulatory considerations as a significant to moderate challenge, while only rural respondents mention access to grant capital. (See Rural-Urban Comparison)

► Are Hesitant To Use Loans To Grow

Over two-thirds of nonprofit respondents report receiving grants, while only one-quarter report receiving loans; this highlights a low uptake of loans among nonprofit social enterprises. For-profit respondents are more likely to take this type of risk, with 68% of them securing loans in 2014. Just under half of organizations in operation for 40 years or more had loans in 2014, making them the most likely to finance activities through credit. (See Economic Impact)

► Want Practical Support

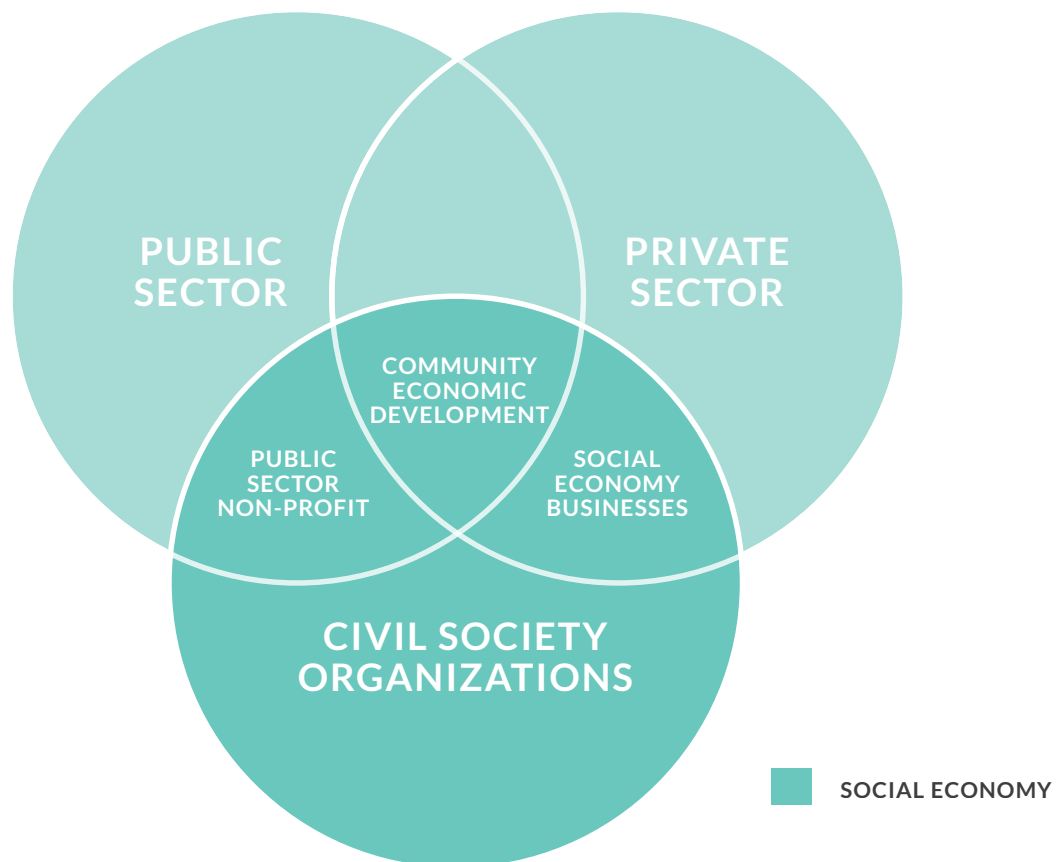
For-profit responding SEs are much more likely to have an interest in resources relating to capital and social purpose investment opportunities. Both for-profit and non-profit respondents identify educational resources and specific training as very helpful. However, nonprofits are more likely to prefer having this information available online, either as a manual or webinar, or in-person through workshops, while for-profits prefer to have this support in-person through coaching. (See Educational Resources Highlights and For-profit Social Enterprise Sector)

► Plan To Grow

Fifty-six percent of all responding social enterprises consider business revenue growth as a very important part of their strategic plans over the next two years. The most common sources of potential revenue growth identified as very likely by all responding social enterprises are profits/surplus and fundraising, followed by government and non-government grants. For-profit responding SEs are actually 10% more likely than nonprofits to identify government grant revenue as very likely. However, for-profits are also much more likely than nonprofit SEs to consider repayable equity (59% vs 17%) and loans/mortgages (56% vs 19%) as potential revenue sources. (See For-profit Social Enterprise Sector and Helpful Resources & Opportunities Highlights)

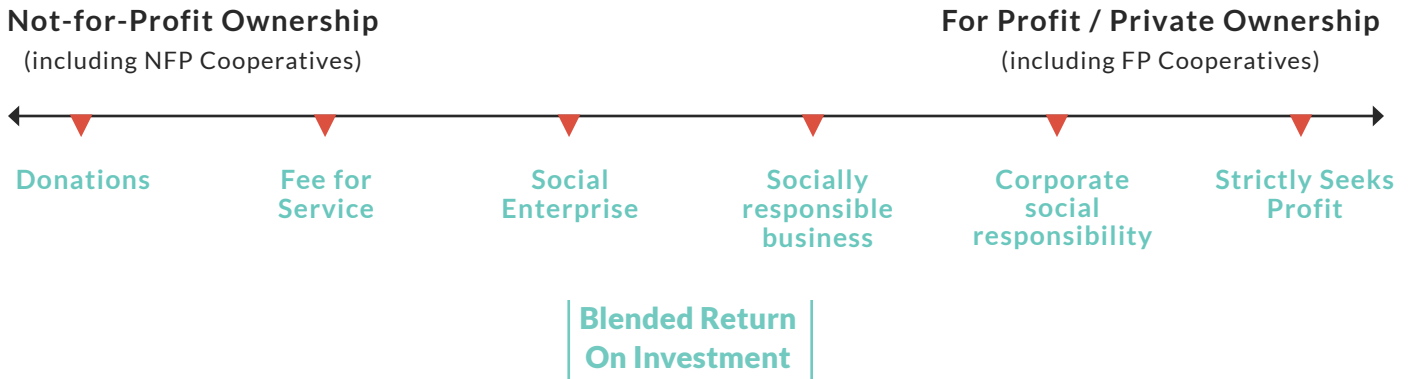
SECTION 1

Grounding of Social Enterprise



Understanding the Social Economy Diagram, Adapted from "An Interactive View of the Social Economy", by Jack Quarter and Laurie Mook, 2010, ANSERJ Canadian Journal of Nonprofit and Social Economy research, vol 1

BUSINESS MODEL CONTINUUM



Business Model Continuum, Adapted from "Introduction to Social Enterprise" workshops by Enterprising Nonprofits (enp), David Lepage, 2011

1.1 What is Social Enterprise?

Definitions of social enterprise continue to be debated. Perspectives can diverge across provinces, countries and sectors, as well as motivations and ideological divides. To add to this complexity, social enterprises tend to defy neat classification, with fluid boundaries and wide variations in form, structure and context. Debates over specific meanings and classifications reflect the diversity of stakeholders in the sector and the fact that this field is still emerging.

However, from a 'big picture' lens, there is broad agreement that social enterprise involves the engagement of an organization in market activities that produce revenue as well as clear social, environmental and/or cultural benefits. **The Government of Ontario states simply that "a social enterprise is an organization that uses business strategies to maximize its social or environmental impact" (Government of Ontario, 2013).** The blending of business revenue generation with the drive to generate measureable, positive impacts in society is sometimes referred to as a 'double bottom line' or a 'blended return on investment'.

Canada's social economy is replete with enterprises that blur the lines between public, for-profit and nonprofit sectors. They comprise a spectrum of legal and operational structures, ranging from for-profit corporations with additional objectives (i.e. social purpose businesses) to nonprofit charitable organizations that manage or own an operation in the market, investing earned revenue back into their programs. They also differ in respect to strategies for generating revenue which can be achieved through the sale of goods and services or fee-for-service program development. A separate hybrid incorporation structure that is neither for-profit nor nonprofit is a third option in some other countries and now in BC. The province is discussing with community stakeholders the possibility of such a hybrid model for Ontario. Co-operatives are one existing structure that crosses the for-profit/nonprofit boundary and have a history of significant contribution to the social economy.

1.2 Momentum, Uncertainty & Opportunity

Many well-established organizations have been practicing 'social enterprise' long before the term was coined, generating revenue through sales of goods and services, fees for service, and service contracts.

However, it is over the last decade or so that this set of concepts and terminology has really gained traction and become more widespread (Bull & Crompton, 2006). This has been a period of trial and error, high energy and new ideas, as well as risk and uncertainty for those involved (Hall & Elson, 2012). Today, despite lacking a distinct legal structure in most provinces, social enterprise is gaining legitimacy as a growing cluster of related practices and is coming to be viewed as a broad sector, a movement or an ecosystem that contributes strongly to community and economic development.

The focus of the sector is slowly evolving away from 'frame-breaking' and innovation towards more specific operational definitions (Dart, 2004). However, "the diversity of players in this ecosystem means there are competing narratives of what social enterprise is and what the priorities are... this creates a challenge in building cohesion and finding common ground" (McIsaac & Moody, 2013). There is competition and discussion taking place to influence how it will become further legitimized and institutionalized (Hall & Elson, 2012).

But what has driven this radical shift? There are numerous explanations.

Major social and political shifts in the late 1970s and early 1980s such as moving control of economic factors from the public to the private sector have encouraged the development of social enterprise activities (Dey & Teasdale, 2013; Bull & Crompton, 2006). Influenced by the strong belief that free market policies will solve most economic and social problems, governments have taken less responsibility for planning, funding and providing services. Instead they've pursued deregulation and privatization policies and relied more heavily on the business sector and philanthropy (Tickell & Peck, 2003). Social enterprise among nonprofits has emerged as a solution to pressures resulting from this shift, including deteriorated funding opportunities and heightened social inequality. Revenue diversification enables the 'third sector' to survive and continue serving communities in a more competitive environment (Day & Teasdale, 2013; Bull & Crompton, 2006).

Another driver of social enterprise is the growing social expectation that market-based approaches can accomplish our goals. Dart (2004) states that "the language of the marketplace has put management at the centre of our organizations, corporate business at the centre of society and defined government and non-profit organizations as non-productive and burdensome". From this perspective nonprofits engage in social enterprise not only out of funding necessity, but also to conform to prevailing norms and values that maintain their organizational legitimacy. It is a response to pressure for more independent, efficient and accountable governance structures in the nonprofit sector, something that is said to be promoted through the use of business practices (Gold & Mendelsohn, 2014; Sepulveda, 2010; Bull & Crompton, 2006; Dart, 2004).

While revenue diversification and increased business-like practices are drivers in social enterprise development, it should be noted that the nonprofit sector in Ontario already generates 60% of its revenue through earned income (fee for service, sales etc.¹). Within the nonprofit sector there is a broad concern that the expansion of social enterprise should not be used as a means to get government “off the hook” for funding many essential social services. Nonprofits are first and foremost community benefit organizations and not all should become social enterprises as it may interfere with their ability to serve their primary mission and purpose for the community. In addition, while recognizing that there is always room for increased efficiency, Ontario nonprofit organizations have been successfully responding to steady growth in demand for services while faced with greater funding challenges.

One additional driver cited is the changing attitudes towards entrepreneurship and consumer demand: it is thought that people (especially younger generations) are becoming increasingly aware of the social impact they can have through production and consumption (Government of Ontario, 2015).

Beliefs about whether these trends are inherently ‘good’ or ‘bad’ often touch a political nerve. These debates raise important questions that are worthy of discussion, but this will not be summarized here.

The Government of Ontario’s Social Enterprise Strategy states that “social enterprises are working alongside government to tackle society’s persistent challenges, ones that are too difficult – and too important – for the public sector to solve alone” (Government of Ontario, 2013). Social enterprise can fill some of the gaps between the usual purview of governments, traditional markets and nonprofits.

For example, the social purpose enterprise model, now more often referred to as “employment and training social enterprises”, developed out of the need to provide paid work to people with various persistent barriers to entering traditional employment. Increasingly social enterprise is being recognized as one of the key tools to support stronger social and economically viable communities.

Although social enterprise emerges amidst change and uncertainty, there is a great deal of hope and excitement about the opportunities generated through this form of social innovation. There are many inspiring examples across Ontario demonstrating how this can be a path to developing an inclusive economy and creatively supporting community needs and resiliency. As social enterprise gains momentum it is imperative to build a profile of the sector and continue to learn from practitioners to improve collaboration, legislation and supports.



>> **More information is available through the suggested reading material in Appendix M .**

1.3 Ontario's Social Enterprise Climate

Government of Canada

The federally funded Social Economy Research Hubs, operating from 2005-2011, created over 400 research products by more than 300 researchers². This body of academically validated knowledge helped to profile social enterprise across the country. Most of the organizations and enterprises under study had received funding through the federal government, along with support from other levels of government and a variety of foundations and other sources. Organizations such as Enterprising Non-profits (enp) and the Toronto Enterprise Fund are just two examples.

Government of Ontario

In the past, the Ontario government has been criticized for lacking a robust and coherent policy framework for social enterprise and for neglecting to provide adequate funding for the sector. However, it is important to note that a variety of Ministries, including Health, Community and Social Services, Citizenship and Immigration have all supported relevant social enterprise work and the Financial Services Commission of Ontario has an ongoing relationship with Ontario co-operatives.

In **2008** the Ontario Poverty Reduction Strategy announced that the Government would explore various supports for social enterprise. With the help of the Ontario Nonprofit Network, in **2010** the Government consulted with nonprofits and created the Partnership Project to strengthen relationships between Ontario's public and nonprofit sectors. One of the recommendations to be implemented through this project was greater investment

in social innovation, which included social enterprise. In **2011** the Government held its first Social Innovation Summit in partnership with MaRS. The Summit produced insights into policy development that contributed to the drafting of [Ontario's Social Innovation Policy Paper](#) in **2012**. The same year marked the formation of the Office for Social Enterprise within the Ministry of Economic Development, Trade and Employment, alongside the appointment of a Special Advisor for Social Enterprise.

While there is still plenty of work to be done to enhance the legal, financial and technical capacities of social enterprises in Ontario, considerable advancements have been made.

Significantly, in **2013** the Government released a policy document titled '[Impact: a Social Enterprise Strategy for Ontario](#)'. The multi-year, \$25 million Strategy represents a milestone for the sector and makes bold commitments to enhancing support, stating that "Ontario aims to be the North American leader in the social enterprise space, attracting the best and brightest social entrepreneurs and impact investors from around the world" (Government of Ontario, 2013). Among the investments funding has been secured for social procurement in the Pan Am Games. They also invested in [SEontario.org/ ESontario.org](#), a community-based platform to share case studies and resources and to help connect the sector.

In **2015**, the Government released a [Social Enterprise Progress Report](#). The publication demonstrates examples of enterprises that have benefited from projects emerging from the Strategy. These include the Ontario Catapult Microloan Fund and the Social Enterprise Demonstration Fund, which enable social entrepreneurs to access financing. The publication reports that the Social Venture ConneXion project, an online platform launched in 2013 to connect investors with social enterprises, has raised \$3.2 million for 23 approved social ventures to date. Finally, the report addresses progress made in the areas of research, consultation and policy development.

The support and collaboration of government and community-based organizations has enabled the development of a set of baseline data and policy recommendations for social enterprise in the province. While there is still plenty of work to be done to enhance the legal, financial and technical capacities of social enterprises in Ontario, considerable advancements have been made.

Community

There are several networks of community-based organizations and programs in Ontario and across Canada whose primary missions relate to fostering social enterprise. In this province, the Ontario Trillium Foundation has been a key funder of this work.



>> Refer to Appendix M for a list of social enterprise resources and recent publications (mainly Ontario focused, with some national inclusions)

‘Inspiring Innovations’, the report of the 2012 Social Enterprise Survey for Ontario report provides a more detailed context piece on Ontario’s social economy, including both government and community supports for social enterprise. Consequently, this report only provides the following links to highlight some of the significant community-based events, developments and related research since that time:

Online

- ▶ The development of the online community of SE through SEontario.org and its francophone equivalent ESontario.org (sharing stories, SE directory, news, events and resources), managed by the Canadian CED Network
- ▶ The Centre for Social Innovation’s SocEnt platform (under development), as a common application form and process for social finance
- ▶ MaRS Centre for Impact Investing (CII) socialfinance.ca

Events

- ▶ Social Enterprise Toronto’s 2014 premier conference, [Trends & Opportunities](#) connecting local SEs to resources, research and community benefit opportunities
- ▶ Pillar Nonprofit Network in London hosting the [2015 Canadian Conference on Social Enterprise](#)
- ▶ Social Finance Forum by MaRS CII : socialfinanceforum.marsdd.com

Research & Policy

- ▶ Social Enterprise Toronto (SET) and the Toronto Enterprise Fund (TEF)’s [Social Procurement Project](#), supported by the Toronto Community Benefits Network, to successfully incorporate SE into community benefit agreements for Pan Am Games and Metrolinx’s Eglinton Crosstown transit development
- ▶ City of Toronto’s [Social Procurement Framework](#)
- ▶ [Anchor Institutions](#) report (Mowat and Atkinson) including SE development as a strategy for poverty reduction
- ▶ Learning from the [Rural Social Enterprise Constellation \(RSEC\)](#) project’s work to support rural SE across the province through ONN and partners
- ▶ Ontario Co-operative Association’s forthcoming research report on Economic Impact Analysis of the Co-operative Sector in Ontario on the economic impact of co-operatives in Ontario. www.ontario.coop/cms/documents/1158/Ontario_Study_Text_Final_Nov_2015.pdf

Networks

- ▶ The many projects of the [*Social Enterprise for Northern Ontario \(SENO\)*](#) network out of PARO
- ▶ [*The Conseil de la coopération de l'Ontario \(CCO\)*](#) decision to specifically include nonprofit social enterprises in its mandate
- ▶ [*The Ontario Social Economy Roundtable \(OSER\)*](#) continues to provide a vehicle to facilitate connection among sector organizations

The above are just a few of the intermediary and support organizations that work to support the development of social enterprises in Ontario. In addition, there are of course, the many organizations and individual entrepreneurs managing and developing social enterprises across the province. It is all of these individuals, organizations and social enterprises together, working along side governments that create the real community climate for social enterprise in Ontario.

However, the above list perhaps serves to highlight some of the trends to watch for – social procurement, the parallel development of online tools for SE development and learning, an increased role for local intermediary organizations providing SE support.

All of these together create the real community climate for social enterprise in Ontario.

SECTION 2

Definition of Social Enterprise

In order to select a sample of survey respondents, it is first necessary to clearly define what characterizes the ‘full population’ of social enterprises to be surveyed; the diversity of and lack of consensus regarding social enterprise makes this challenging. In order to be able compare Ontario data with data from nonprofit social enterprise surveys in other provinces, and to compare current data with that from 2012, the same criteria were used to define these populations:

Nonprofit Social Enterprise

Definition: “A business venture owned or operated by a nonprofit organization that sells goods or provides services in the market for the purpose of creating a blended return on investment, both financial and social/environmental/cultural”.

- ▶ Respondents must be incorporated as nonprofits and their market activities must relate to a clear social, environmental or cultural benefit.
- ▶ Furthermore, the study distinguishes between social enterprising and traditional fundraising work. If a nonprofit’s market activity has no social/environmental/cultural benefit in itself, it is not considered social enterprise.

“A business venture owned or operated by a nonprofit organization that sells goods or provides services in the market for the purpose of creating a blended return on investment, both financial and social / environmental / cultural.”

However, the for-profit survey differed slightly and the defining criteria were obviously distinct. It was therefore necessary for nonprofit and for-profit social enterprises to be treated as separate populations with each sample frame having clearly defined common attributes.

For-Profit Social Enterprise

Definition: “A business venture incorporated as a for-profit business with a defined cultural, social and/or environmental mission”.

While a statistically significant for-profit sample frame is included in this survey, the majority of survey respondents in this study are nonprofit organizations. The decision to focus more heavily on nonprofit organizations was made for several reasons. This survey needed to include yet grow the previous survey. There was already a large nonprofit sample frame identified through the 2012 survey and the contacts for much of the additional housing and childcare subsectors were readily available. The time and financial resources required to both create and survey a more comprehensive and accurate sample frame of for-profit social enterprises was beyond the capacity for either MaRS CII or for CCEDNet to undertake. In addition, outside of qualifications such as the B-corp certification, it is difficult to accurately confirm the status of many for-profit social enterprises, that they are actually engaging in social enterprise.

For-profit social enterprises are included in the Ontario survey for the first time and are compared with nonprofit social enterprises in this report. For a more detailed profile of Ontario for-profit social enterprises, please refer to the [*2014 For-profit Social Enterprise Survey for Ontario Results*](#).

“A business venture incorporated as a for-profit business with a defined cultural, social and / or environmental mission.”



>> For a more detailed profile of Ontario for-profit social enterprises, please refer to the 2015 Report of For-profit Social Enterprise Survey for Ontario.

SECTION 3

Survey Methodology & Limitations

3.1 Purpose

The primary objective of the 2015 Social Enterprise Survey for Ontario is to generate widely intelligible and comparable quantitative indicators of the size, scope and socioeconomic impact of social enterprise activity in the province during 2014. This survey builds on the results of the 2012 Social Enterprise Survey for Ontario. As part of the national initiative to better understand the nonprofit social enterprise sector, senior researchers, Drs. Peter Hall and Peter Elson, have collaborated with host research teams in all provinces and territories (see sess.ca). Researchers in each of these regions have collaborated with sector development organizations, intermediaries and academics in order to complete the study. The findings have been and will continue to be used to support the work, research and development of the nonprofit social enterprise sector across Canada.

For the first time, a comparison of Ontario for-profit social enterprises has been included in



>> **For Cross-Comparative Data on Social Enterprise by Province see Appendix L**

this year's survey. The MaRS Centre for Impact Investing collaborated with CCEDNet-Ontario to conduct this portion of the study, distributing invitations to and analysing responses by identified for-profit social enterprises. The for-profit survey contained modified questions to better reflect the needs and concerns of for-profit social enterprises so these are not included in all of the analysis but they are integrated into a snapshot of the overall sector, compared to the larger nonprofit results and described as a specific subsector as part of this report.

While every effort was made to include as many social enterprises as possible, it is clear that there are many more. Experts estimate 10,000 (Government of Ontario). However, we have captured a diverse portion of the social enterprise activities in the province due to

sampling criteria and response rates. These results should be considered as providing a point-in-time view of the Ontario social enterprise landscape.

3.2 Methodology

Given the purpose of the study, a short and standardized questionnaire was used. Most of the questionnaire is identical to the one used in other provinces, although a small number of Ontario specific questions relating to challenges, relevant educational resources and business growth strategies were added. Respondents received the invitation via email, which included a link to access the survey online. Participants were also given the option to complete the survey over the phone, by mail or by fax.

Creating the Catalogue

Best efforts were made to create a sample frame that included all social enterprises in Ontario in order to collect data from a representative selection of the population. Building on the list of social enterprises created for the 2012 study, new enterprises and updated contact information were added through online searches and phone follow-ups.

Recruitment Support

Several provincial networks listed below promoted registration and participation in the survey through their e-newsletters. Networks encouraged social enterprise organizations to share their contact information with the research team. Recruitment support was received from:

- ▶ Co-operative Housing Federation of Canada
 - ▶ MaRS Centre for Impact Investing
 - ▶ Ontario Coalition for Better Child Care
 - ▶ Community Education Partnership Centre (CEPC), Georgian College
 - ▶ Ontario Co-operative Association
 - ▶ Ontario Non-Profit Housing Association
 - ▶ Ontario Nonprofit Network
 - ▶ Ontario Social Economy Roundtable
 - ▶ Theatre Ontario
 - ▶ Social Enterprise Evolution/Évolution de l'entrepreneuriat social (SEE)
 - ▶ NORDIC Institute, Algoma University
- The subcategories identified were:**
- ▶ Arts and Culture
 - ▶ Child Care (*nonprofits only*)
 - ▶ Co-operatives (*excluding child care and housing*)
 - ▶ Farmers' Markets
 - ▶ Housing (*includes nonprofit housing co-ops and non-profit housing organizations not incorporated as co-operatives*)
 - ▶ Thrift Stores
 - ▶ Employment Enterprises
 - ▶ Miscellaneous
 - ▶ For-profit
- The Housing, Child Care and For-profit sub-sectors are included here for the first time in the Ontario survey.
- ▶ Centre canadien pour le nouveau communautaire
 - ▶ Conseil de la coopération de l'Ontario

NONPROFIT SUBSECTOR DESCRIPTIONS:

- ▶ **Arts and Culture** - Includes art galleries, conservation areas, heritage sites, museums, and theatres
- ▶ **Child Care** - Organizations providing child care services (both single providers and larger providers with multiple sites)
- ▶ **Co-operatives** - Nonprofit co-operatives³ (excluding child care and housing co-ops) which provide a variety of goods and services to their members and the wider community
- ▶ **Farmers' Markets** - Organizations that manage markets where farmers sell their produce and value-added goods to the public
- ▶ **Housing** - Consists primarily of non-profit housing co-operatives and a smaller number of other nonprofit housing organizations
- ▶ **Thrift Stores** - Retail shops that receive donated goods for the purpose of re-sale
- ▶ **Employment** - Social enterprises that train and/or employ people with persistent barriers to stable employment (*referred to as Social Purpose Enterprise in the 2012 report*)
- ▶ **Miscellaneous** - A range of organization types that are each too small to provide meaningful statistics as independent categories. This subcategory represents the diversity of entrepreneurial activity among nonprofits, including services such as facility rental, translation services, cafes, and non-thrift retail.

Also note that francophone social enterprises were distinguished within each of the respective sub-sector categories.

Potential respondents were contacted by the research team and were screened to determine whether they fit the following definition of a social enterprise: "A social enterprise is a business venture owned or operated by a non-profit organization that sells goods or provides services in the market for the purpose of creating a blended return on investment, both financial and social/environmental/cultural." Organizations were mainly disqualified

because they were owned and operated by a for-profit company or government body (including First Nations), they were no longer in existence or they had not been active in 2014. For-profit social enterprises were only excluded from the nonprofit survey sample and were referred to MaRS CII for the for-profit survey.

Process

The fieldwork occurred over a four-month period between March and July, 2015 in a general series of four stages:

- ▶ Adding to and confirming contacts for a master list of social enterprises
- ▶ Validation and verification of social enterprise activity
- ▶ Invitation distributed via email to eligible organizations for participation in study.
- ▶ Three-staged follow-up process to all listed in the sample frame

There were some differences in collecting responses among some sub-sectors. For example, no list was available for nonprofit housing organizations not incorporated as co-ops, consequently they only received encouragement messages through sector e-newsletters. Due to the large number of nonprofit child care providers (over 1,000 identified), it was not feasible to do phone follow-ups so this group received email reminders only.



>> Appendix C: Detailed Survey Methods

Of the overall 3,910 confirmed social enterprise contacts from all sectors including childcare, some parent organizations and head offices responded on behalf of multiple social enterprises. Of the 1,353 valid respondent nonprofit and for-profit social enterprises, 34 parent organizations and head offices provided aggregate information for more than one social enterprise. Therefore, the actual number of unique respondents was 597. The

overall response rate for both for-profit and nonprofit (excluding 40 childcare respondents) based on the total number of 557 responses was 21%.

The researchers conducted several random checks for internal consistency in responses. When necessary, respondents were re-contacted to clarify unclear or contradictory responses, especially regarding the collection of financial data. Particular attention was paid to correcting variables, which may have been misreported or incomplete. Social enterprises that did not provide complete financial data were not included in the analysis of the financial questions.

Throughout the process of contacting and surveying organizations, there were a number which researchers felt met the necessary criteria for social enterprise identification but did not self-identify in the same way. Several contacts stated to researchers in initial conversations about the survey that they were not sure they fit the criteria as a social enterprise due to their nonprofit nature. This highlights a lack of clarity in the sector around being able to participate in the market to further a nonprofit mission. The decision of some organizations not to identify as a social enterprise could be based on a general reluctance to declare market activities, the lack of an explicit regulatory framework, and the diverse types of social enterprise activities.

Most of the nonprofit subsectors in Ontario are well established and their enterprises identify strongly with their subsector; as farmers' markets, child care providers and theatres, for example; rather than as a "social enterprise", which is a relatively new term. Encouraging these organizations to identify as a social enterprise was a key part of the initial field work.



>> For a complete breakdown of numbers of respondents and non-respondents, see Appendix C: Detailed Survey Methods

The final sample set, while not exhaustive, does reflect the diversity within the sector and provides robust data of subsectors not recorded in previous studies of Ontario's social enterprises.

The Questionnaire

The questionnaire was first developed and piloted by students in Dr. Peter Hall's course at Simon Fraser University. The questionnaire was further refined in subsequent surveys to mitigate problems identified in the original version including legal structure clarification, expansion of sector definitions and the addition of sources and uses of grant financing.

Consistent with the 2012 survey, the Ontario questionnaire includes a grouping of questions related to the types of obstacles that social enterprises may be facing including challenges related to governance, finance, operations and marketing. The survey also features a grouping of questions focused on the types of educational resources that would be relevant to social enterprise growth and development. For

the first time this year, additional questions about specific growth strategies were also added. While these questions are unique to the Ontario survey, the basic structure of the core questionnaire was not changed from the surveys used in other provinces.



>> To see the complete questionnaire, see Appendix A

For-profit Survey Methodology

In order to make the sample frame as comprehensive as possible two separate survey platforms were created. The survey questions in both platforms were identical. One was sent to all participants in the known sample frame, and one was an open survey used to reach out to broader networks in Ontario through different communication channels. For the purpose of this report, only the results for the known sample frame are included. The results from both the for-profit known and unknown sample groups can be found in the [2014 For-profit Social Enterprise Survey for Ontario Results](#).

Organizations not meeting the definition of social enterprise for the purposes of the for-profit survey (See Definition of Social Enterprise) were excluded or those that were incorporated as nonprofit enterprises were requested to contact CCEDNet to be included in the nonprofit survey sample. The for-profit survey used non-probability (purposive) sampling and included only self-identified social enterprises that have received or are receiving services from organizations offering venture services geared specifically toward social enterprises or social purpose business. More-

over, the known for-profit sample frame went through a vigorous assessment and interview process to determine if they qualify as a social enterprise or social purpose business.

For the known for-profit sample, a data set of social enterprise was compiled using internal CRM systems and from client databases from different programs areas within the MaRS Discovery District. These databases included clients in healthcare, cleantech, edtech, other social innovation clients as well as B Corp certified clients. The social innovation and B Corp certified clients included social enterprises from a wide range of sectors including health, education, environment, retail, consumer project, youth services, social services, housing, arts and culture and agriculture. The original list in the known sample frame contained 362 different social enterprises of which 93 completed the survey. About 32 enterprises completed the unknown sample survey.

The respondents in the known sample frame were informed through an introductory email prior to receiving the survey. Subsequent reminder emails were sent over a 2-month period. In addition to the 4 email reminders, extensive follow-up was made via telephone in the weeks following the receipt of the survey to encourage participation and provide support.

The open (unknown) survey was shared to different organizations and partners as well as through social media (Twitter, Facebook, LinkedIn). For an extensive list, consult the MaRS report.

The for-profit social enterprise survey questions are identical to the non-profit survey for easier and accurate comparison and analy-

sis. Similar to the nonprofit survey, the 2015 Ontario For-Profit Survey included a set of standardized questions specially designed to gather data on the size, scope and the impact of the sector.

Questions about the parent organization, charitable status, and membership were omitted from the for-profit survey, as they were not relevant to the sector. Instead, four new questions were added to obtain a broader view of finances and capital needs and demand of the sector. The additional questions examined the current and fixed assets, as well as additional capital needs for the organizations. These questions were drawn from the Social Finance Census 2010 to study the changes and growth of the sector in the last five years. To see the complete for-profit questionnaire, refer to the [*2014 For-profit Social Enterprise Survey for Ontario Results*](#).

SECTION 4

Survey Findings

While for-profit social enterprises findings are integrated in some sections of this report, the majority of these results focus on nonprofit social enterprises. More detailed results of for-profit social enterprises can be found in the For-profit Focus section of this report and in the [*2014 For-profit Social Enterprise Survey for Ontario Results*](#).

In the case of nonprofit child care organizations, the response rate was heavily influenced by a few very large child care providers that manage many sites. This is not representative of the child care sector as a whole and very different from the overall nonprofit sector. In order not to skew the entire analysis, this data is analyzed separately from the other

nonprofit social enterprises. Except for the first paragraph of section 4.1, child care providers are not included in the analysis for this section. Throughout the report, unless otherwise specified, the term “nonprofit” does not include child care data. Detailed results for nonprofit child care respondents can be found in the Child Care section of this report.



>> For highlights from each subsector, see the summary sheets available online at www.ccednet-rcdec.ca/en/toolbox/2015_Ontario_SE_Report-Feature_sheets

4.1 Structure & Purpose

Unless otherwise noted, the results in this section are based on the responses of 449 nonprofit social enterprises that do not provide child care services.

BASED ON RESPONSES OF

449

NONPROFIT SOCIAL ENTERPRISES
(excluding child care)

SOCIAL ENTERPRISE SUBSECTORS REPRESENTED

In the nonprofit survey, subsectors are mutually exclusive; respondents can choose only one. The essence of some subsectors is obvious, relating to its product or service (e.g. farmers' markets, child care and thrift stores). Others, like the employment subsector relates to who it employs. In reality, social enterprises don't always fit neatly into only one subsector so sometimes an arbitrary choice had to be made. As mentioned above, the housing subsector in the sample consists mostly of housing co-operatives.

The count of nonprofit respondents by subsector demonstrates that the thrift subsector is relatively much larger than others in the sample. The miscellaneous, arts and culture and housing subsectors are similar in size while the employment, child care and farmers' market subsectors are smallest.

31

FARMERS' MARKET

40

CHILD CARE

43

EMPLOYMENT

58

HOUSING

62

ARTS & CULTURE

65

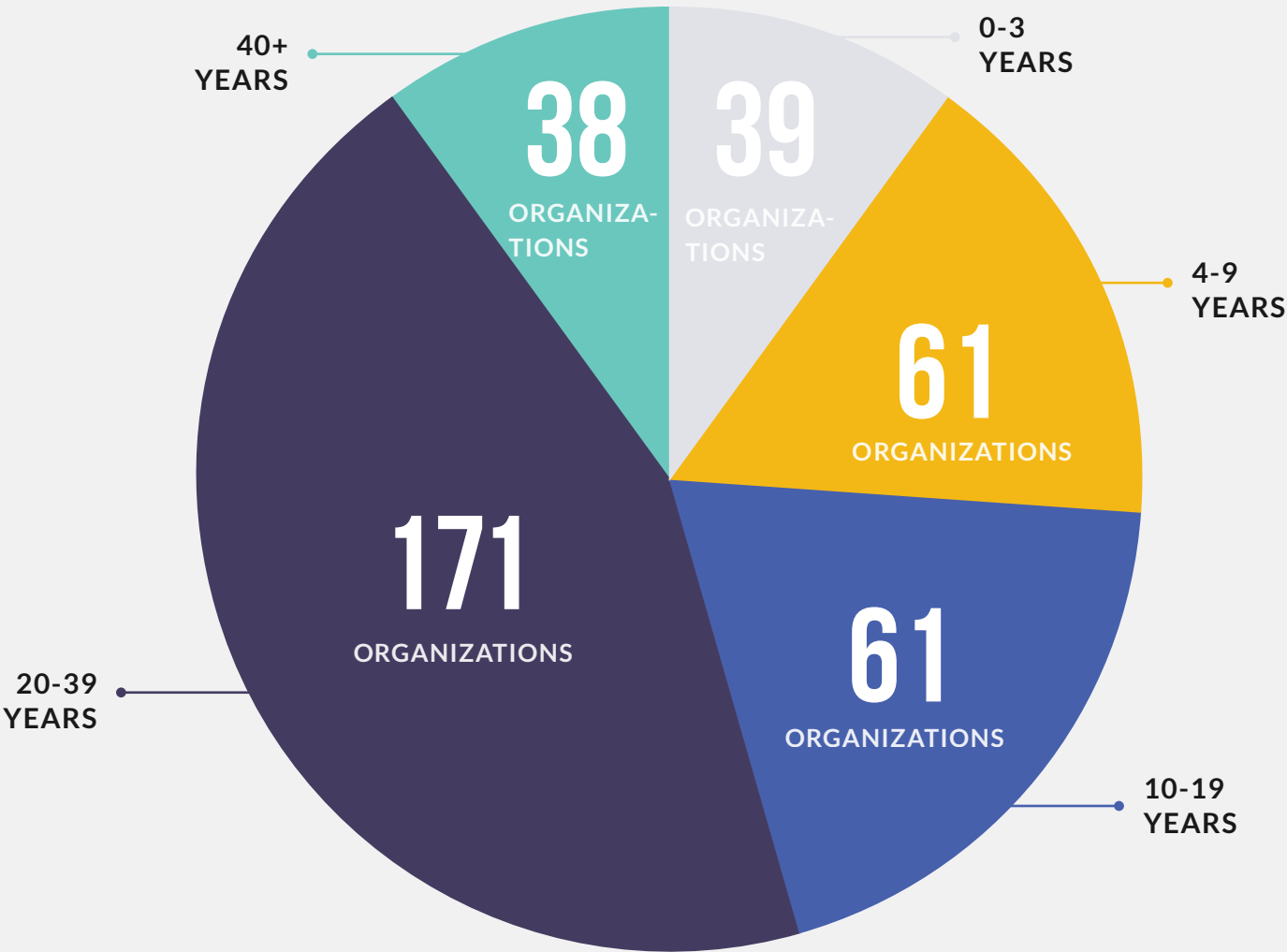
MISCELLANEOUS

190

THRIFT

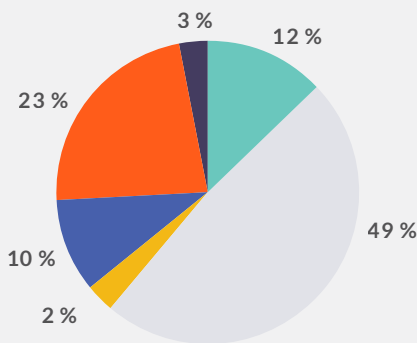
**AGE OF SOCIAL
ENTERPRISES REPRESENTED**

Around three quarters of respondents from the nonprofit survey state that their social enterprise is 10 years or older, with almost half being between the ages of 20-39 years. Twenty-six percent of social enterprises are less than ten years old.

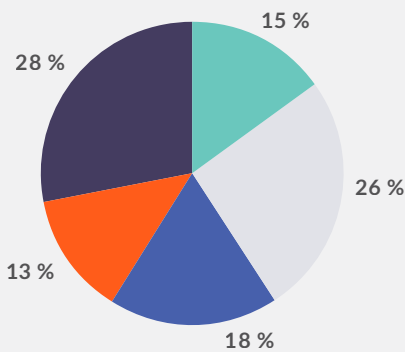


AGE GROUPS BY SUBSECTOR

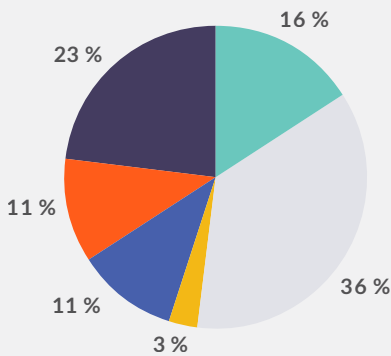
A more detailed breakdown by age groups demonstrates that housing and arts and culture SEs have similarly high median ages. However the arts and culture subsector is more dispersed across the age groups while housing tends to be concentrated in the two oldest groups only. This increased detail also shows that **about half of respondents in the miscellaneous subsector and almost one quarter of employment are currently growing rapidly, being just 3 years old or younger.**



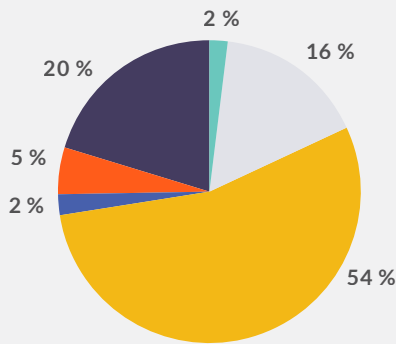
0 - 3 YEARS



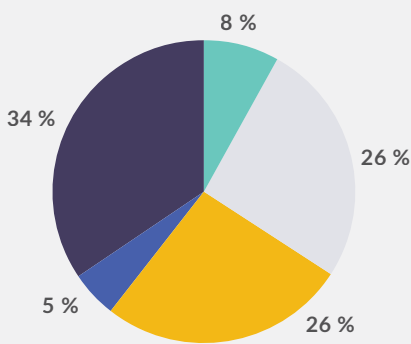
4 - 9 YEARS



10 - 19 YEARS



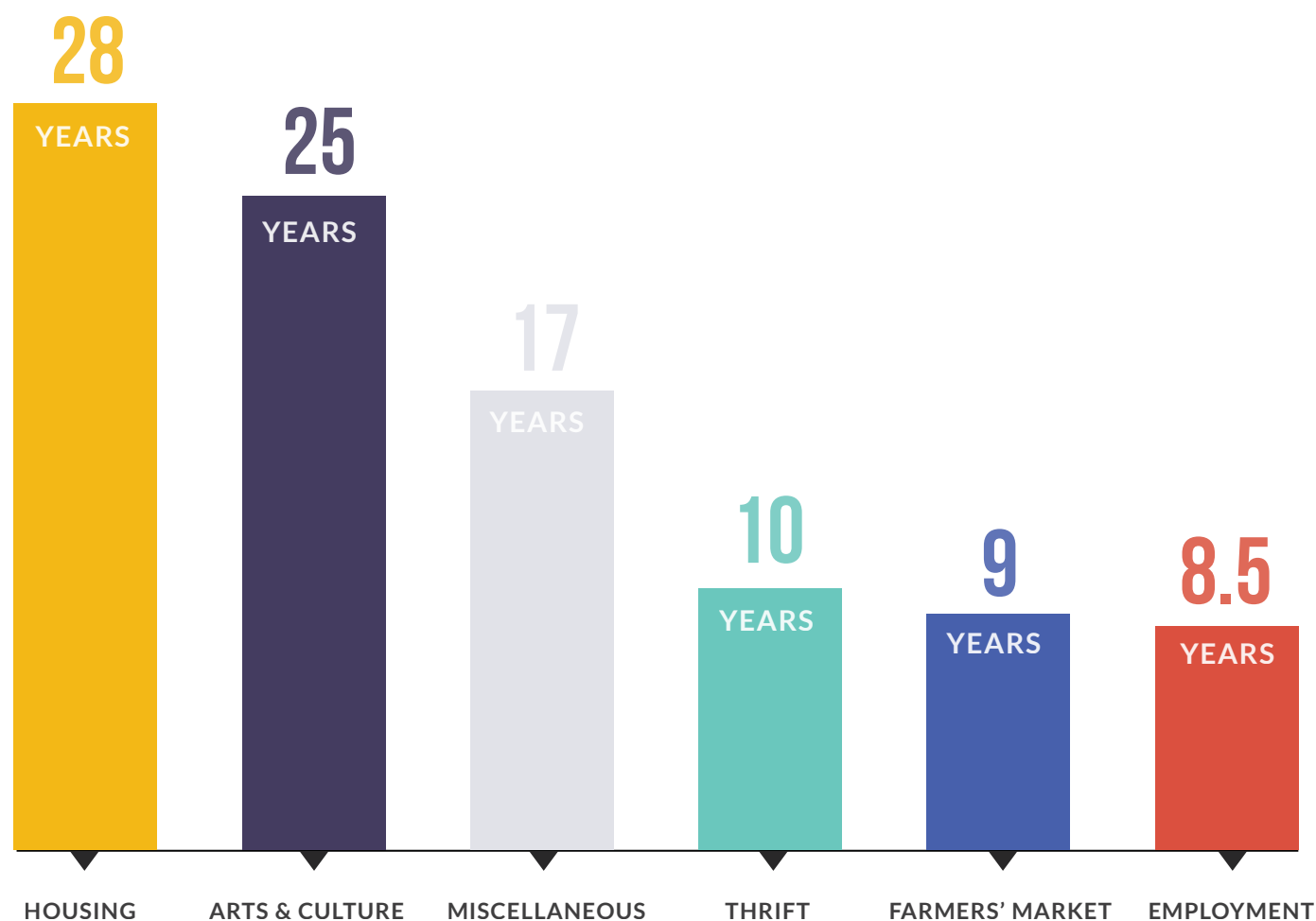
20 - 39 YEARS



40+ YEARS

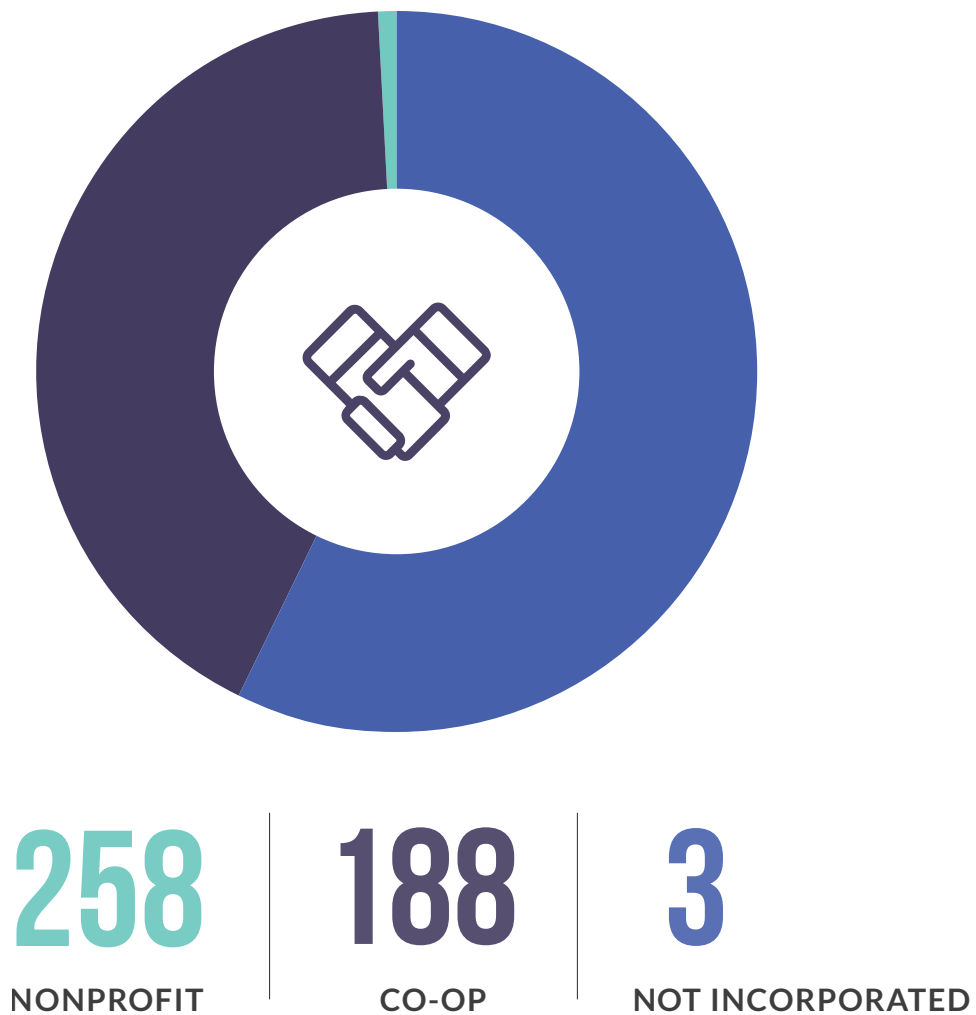
MEDIAN AGE BY SUBSECTOR

The median age of nonprofit respondents is 22 years. However, when broken down by subsector, large differences become apparent. The median ages of the farmers' market, employment and thrift subsectors are all 10 years or less. Furthermore, the median age of the housing subsector (28 years) is more than three times that of the farmers' markets (9 years). The older age of the housing sector is likely a reflection of the decline of public funding for social and affordable housing in Ontario and Canada since the 1990s (Gaetz, 2010).



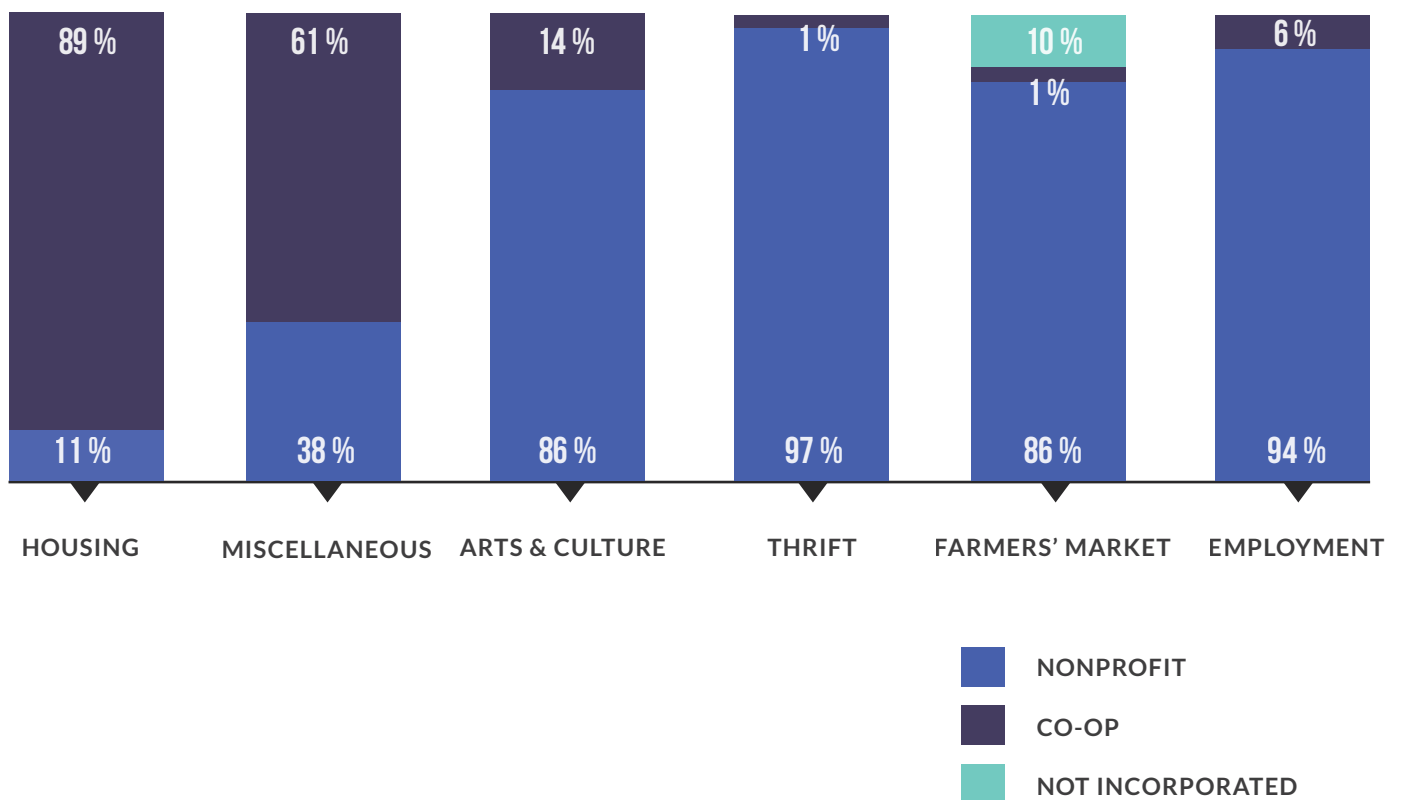
PROPORTION OF CO-OPS (NONPROFIT SURVEY)

Within the nonprofit survey, 42% of respondents identify as nonprofit co-operatives; just 1% identify as unincorporated (3 farmers' markets); and the remaining 57% are nonprofits that are not co-operatives. Just under half of respondents identify as registered charities.

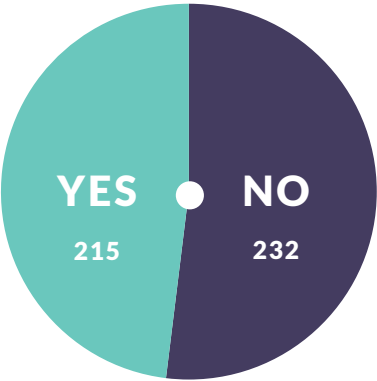


PROPORTION OF CO-OPS BY SUBSECTOR

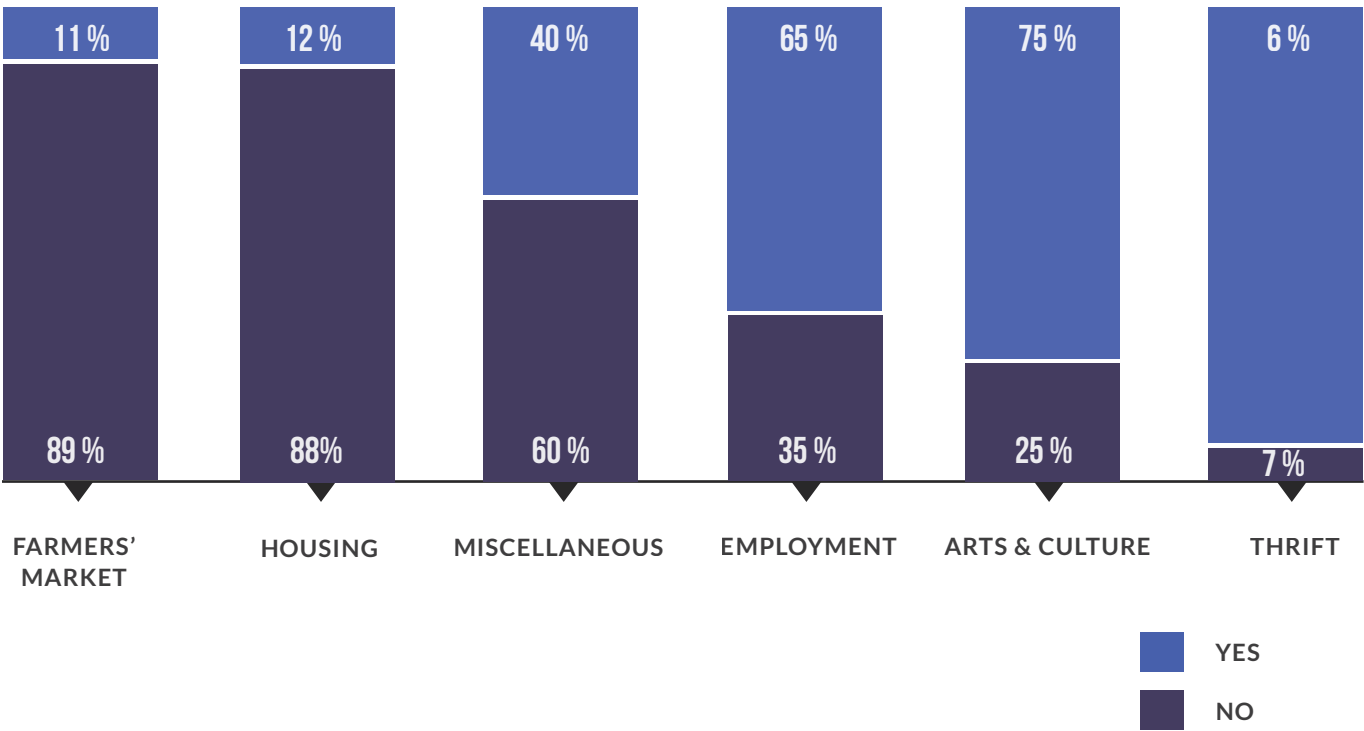
The relationship between subsector and proportion of co-ops seems to be correlated with that between subsector and charitable status. In most cases if a subsector has a low proportion of co-ops, it will have a high proportion of registered charities. The farmers' market subsector is the major exception, with a low proportion of both co-ops and registered charities⁴.



CHARITABLE STATUS OVERALL
(NONPROFIT SURVEY)



CHARITABLE STATUS
BY SUBSECTOR



Purposes Selected by Subsector

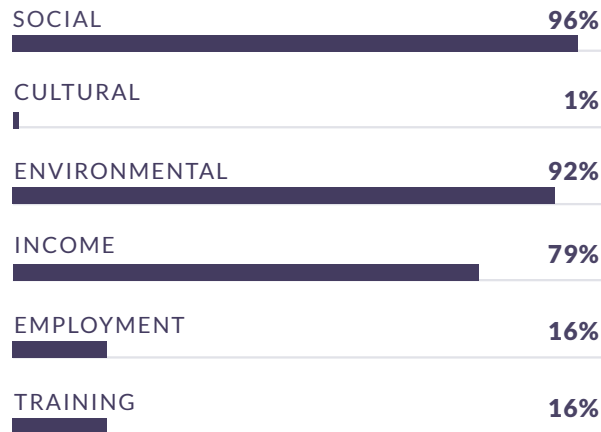
There are considerable differences when comparing purposes selected by respondents in each subsector (see chart below). Some are explained in the context of overall trends discussed previously. For example:

- ▶ Social purpose is common across sectors, only falling below 80% in the arts and culture subsector.
- ▶ Cultural purpose is mostly concentrated in just two subsectors – arts and culture and farmers’ markets - with some in miscellaneous.
- ▶ Environmental and income generation purposes are most concentrated in the thrift subsector, with considerable environmental purpose also showing up in the farmers’ market and miscellaneous subsectors.
- ▶ Employment and training purposes are highest in the employment subsector, with considerable levels in the miscellaneous sector as well.

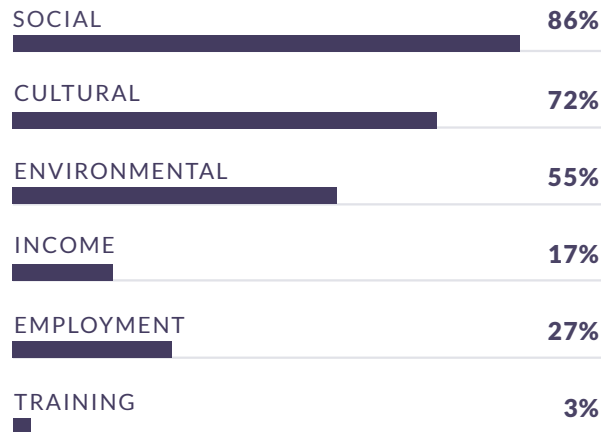
Some subsectors tend to identify strongly with a smaller number of purposes, such as the housing and arts and culture subsectors, while others tend to identify with multiple purposes.



Thrift



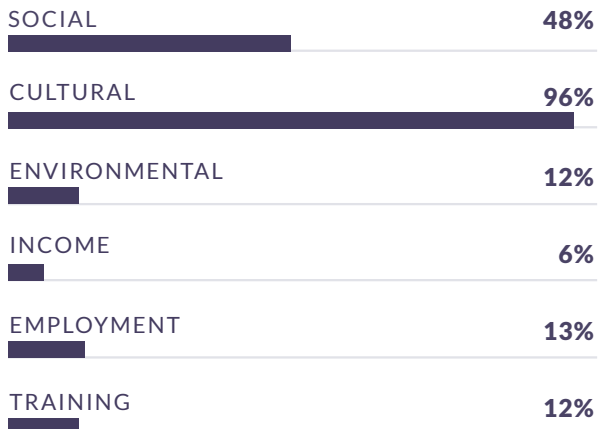
Farmers' Market



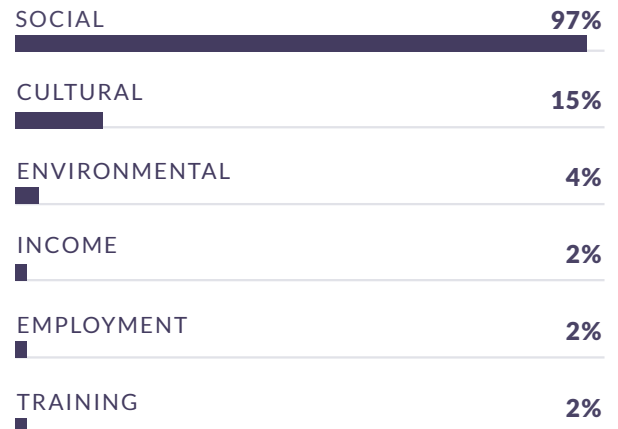
>> For additional nonprofit results related to purpose, see Appendix H.



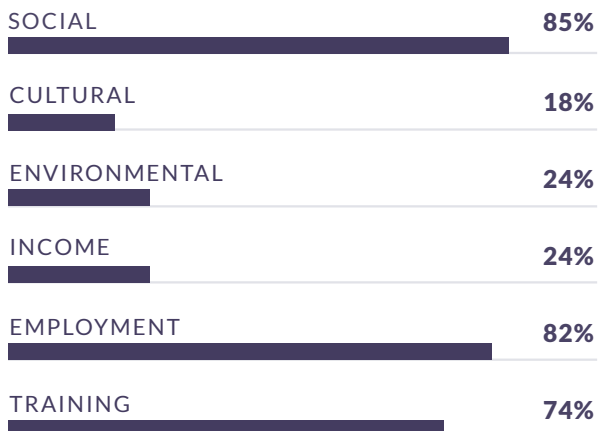
Arts and Culture



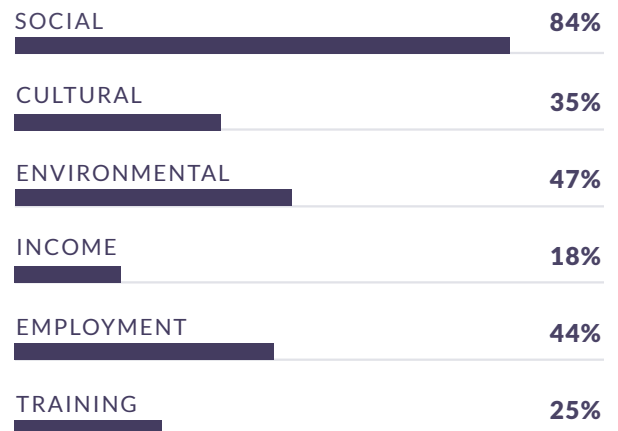
Housing

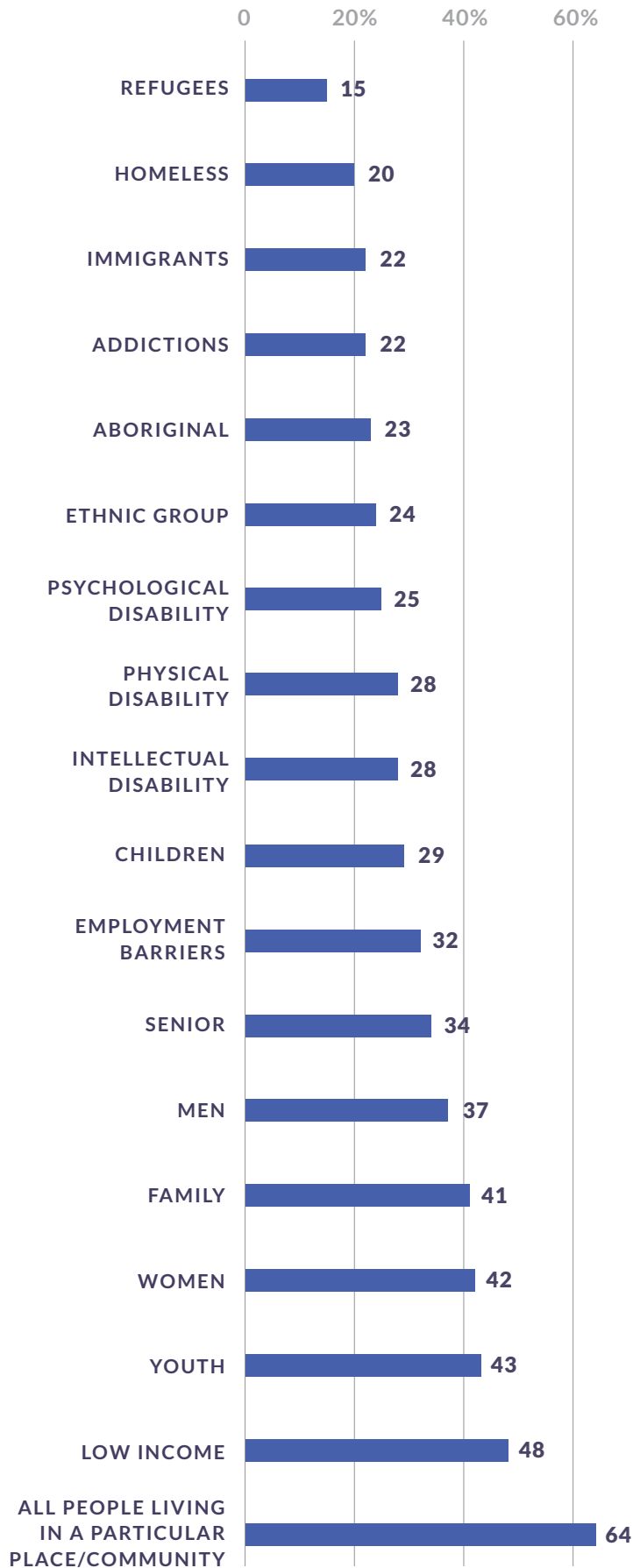


Employment



Miscellaneous





GROUPS SERVED, EMPLOYED OR TRAINED BY SOCIAL ENTERPRISES

Another way to gain a sense of the purposes that social enterprises identify with is to examine their “targeted groups”, the key populations they aim to train, employ or provide services to as part of their mission. Nearly half of nonprofit survey respondents serve people with low incomes. About two-fifths serve youth, women and families. Just one-seventh of respondents specialize in serving refugees.

GROUPS SERVED BY SOCIAL ENTERPRISE SUBSECTORS

When comparing targeted groups by subsector we can see that the arts and culture and farmers' market subsectors are the only two not to include a low-income target in their top three groups served. The farmers' market and arts and culture subsectors are also the only two to include children in their top three targeted groups. Refugees show up in the bottom three across all subsectors and homeless individuals in four of the six subsectors. Homelessness is likely under-represented due to the fact that only

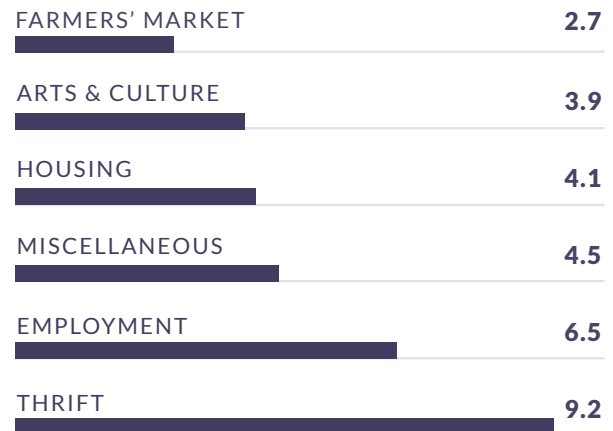
housing co-operatives were surveyed and not the nonprofit housing sector in general. It is also possible that structural inequalities are reflected here; perhaps there is less funding available to support social enterprises that serve more stigmatized groups. Note that target group 'All people living in a particular place/community' has been excluded here since it is in the highest three target groups for all subsectors except for employment.

	HIGHEST 3	LOWEST 3
ARTS & CULTURE	Youth, Family, Children	Psychological Disabilities, Refugees, Homeless
EMPLOYMENT	Low Income, Employment Barriers, Women	Refugees, Family, Children
FARMERS' MARKET	Children, Family, Senior	Addictions, Homeless, Refugees
HOUSING	Low Income, Family, Senior	Refugees, Psychological Disabilities, Addictions
MISCELLANEOUS	Youth, Low Income, Employment Barriers	Ethnic Groups, Homeless, Refugees
THRIFT	Low Income, Women, Men	Immigrants, Homeless, Refugees

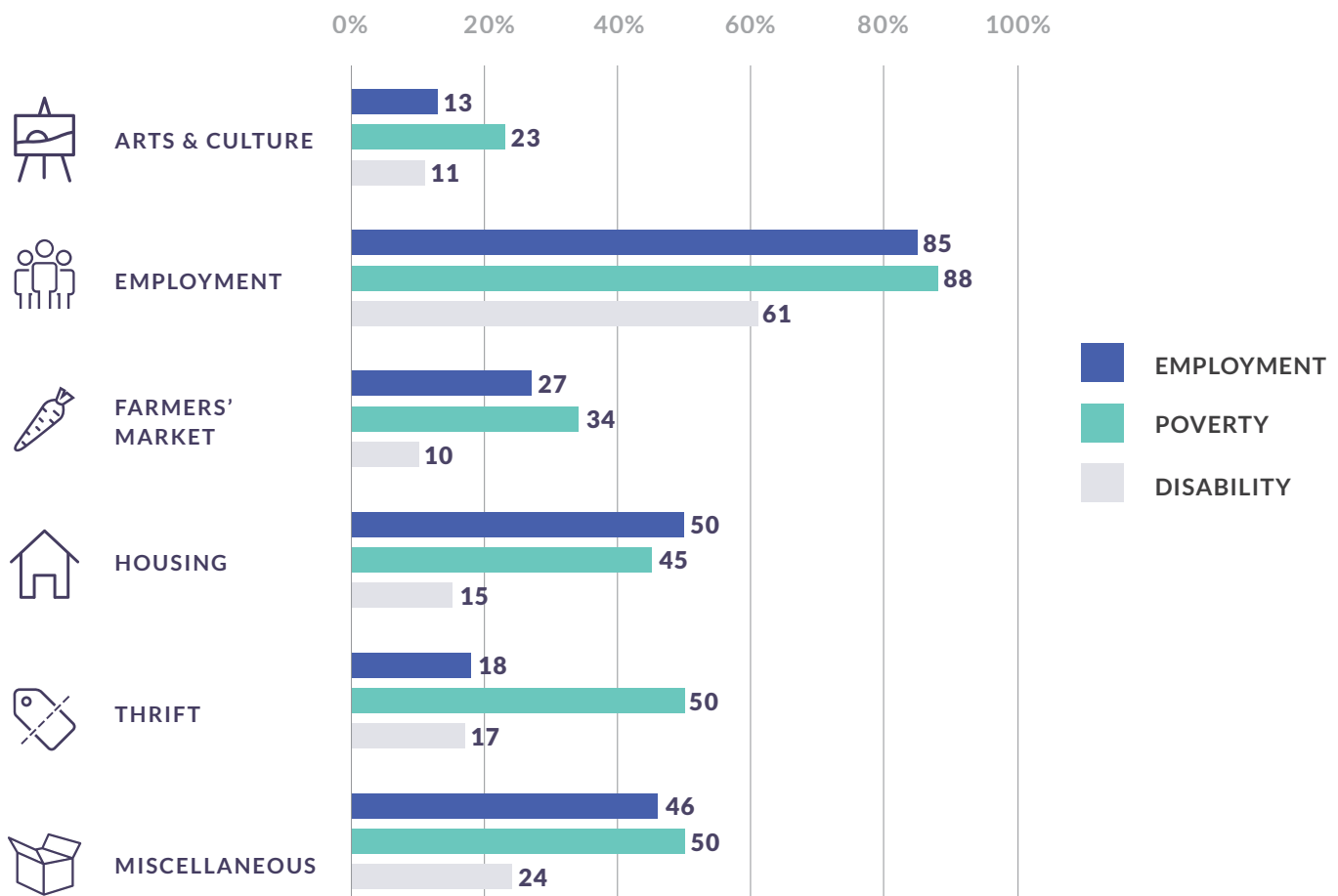
AVERAGE NUMBER OF TARGETED GROUPS BY SUBSECTOR

Sectors also vary according to the number of groups they are likely to target. Respondents in the thrift subsector report an average of about nine targeted populations, while the averages for housing, arts and culture and farmers' market subsectors are less than half of that.

The fact that farmers' markets have the fewest number of targets does not necessarily mean that they serve less people. Most likely it means that they are serving the general population and do not target many specific groups.



SPECIAL FOCUSES BY SUBSECTOR



For the purpose of a more in-depth analysis of Ontario's social enterprise activities, 'employment-focus', 'poverty focus' and 'disability focus' categories were created by combining several variables.



>> For more details on these special foci, see the **Poverty Focus and Disability Focus** sections further on in this report.

Employment (85%), poverty (88%) and disability (61%) focuses are most concentrated in the employment subsector. This is expected in light of the criteria used to define the focuses and due to the role that supporting employment for people with disabilities has played in the development of social enterprise in Ontario. The miscellaneous subsector also has a significant focus on employment (46%) and poverty (51%). The thrift and housing subsectors have similar levels of poverty focus (50% thrift and 45% housing), but a lesser emphasis on employment or disability. The farmers' market and arts and culture subsectors have the least focus on employment, poverty and disability.



>> To see these industry differences by nonprofit subsector in detail, refer to **Appendix H**.

INDUSTRIES OF NONPROFIT SOCIAL ENTERPRISES

HEALTH AND SOCIAL SERVICES	16%
RESOURCES, PRODUCTION, CONSTRUCTION	26%
ARTS, CULTURE, COMMUNICATION	28%
PROFESSIONAL SERVICES	29%
OTHER SERVICES	30%
REAL ESTATE	33%
ACCOMMODATION, FOOD, TOURISM	34%
TRADE, FINANCE	36%

Responding nonprofit SEs work in a wide range of industries and are fairly distributed across them. However, industry categories differ greatly across the nonprofit subsectors. The majority of respondents from the thrift subsector are involved in trade/finance, professional services and 'other' services. Farmers' markets are most likely to be engaged with a range of goods and services including resources/production/construction, trade/finance, accommodation/food/tourism and arts/culture/communication. Arts and culture respondents are engaged with the arts/culture/communication and accommodation/food/tourism industries. The industries engaged in by the employment and miscellaneous subsectors are evenly dispersed, with respondents not concentrated in any one industry in particular. Finally, those from the housing subsector are engaged almost exclusively in the real estate industry, which is the least common among most other subsectors.

Thunder Bay •

4.2 Geography

Respondents were asked to provide various data relating to location, urban/rural status, and geographic scale of operation. This information provides a spatially sensitive perspective of social enterprise activity in Ontario.

NONPROFIT SOCIAL ENTERPRISES BY REGION



>> To see which counties are included in each region, refer to Appendix J.

North
42

• Sault Ste. Marie

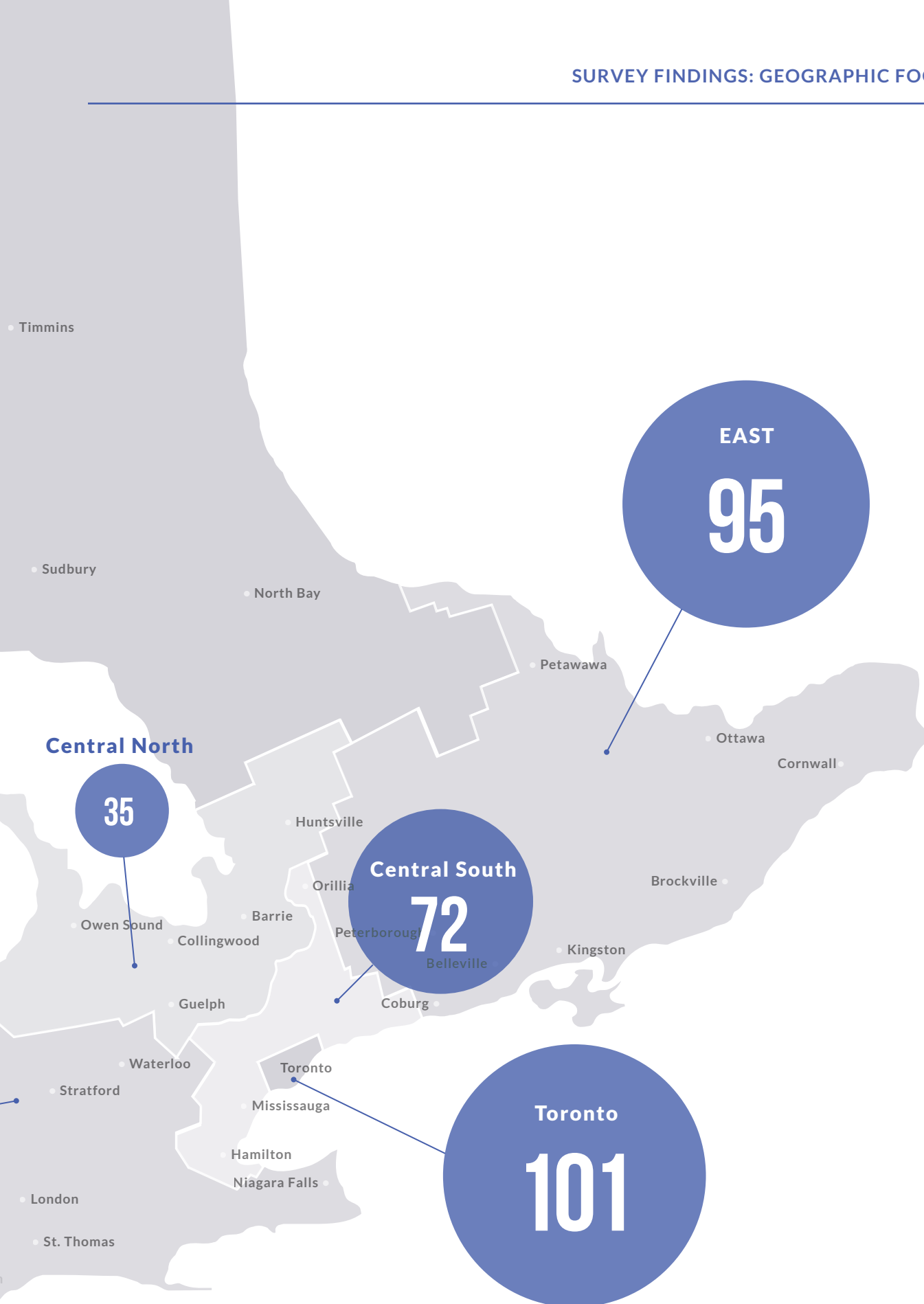
South West

104

Sarnia

Chatham

Windsor



Geographic representation is somewhat skewed by sampling limitations. When building a sample frame, the ideal scenario is to have access to a list of everyone in the population to be surveyed; this was the case in some subsectors but not in others. When a full list is not available it must be built to the best of one's knowledge, and this tends to introduce some bias towards urban areas in general and Toronto in particular. This relates to the connections and knowledge available in these areas and also the likelihood that urban social enterprises are generally more visible.

Furthermore, in subsectors that tend to have parent organizations managing sites across particular regions, the non-response of just a few actors can have a significant impact on the geographic spread of respondents. For example in the thrift subsector, parent organizations for some regions responded while those from others did not. This likely contributes to the larger response rates in the South-Western region.

Unless otherwise specified, all of the results from this Geography section represent the responses of 449 nonprofit social enterprises that do not provide child care services. To learn about the geographic distribution of nonprofit child care respondents, refer to the Child Care section in this report.

4.2.1 Regions

The location of each respondent has been mapped and classified according to six regions of Ontario. These regions consist of collections of adjacent counties and districts.

The North and Central North regions show the lowest response rates, at 9% and 8% respectively. Although the North region is by far the largest in terms of area, it is also the most rural. The Central North region is significantly rural as well.

Regional response rates can be compared to regional populations to see how the number of social enterprises in a region corresponds to the population size of that area. In this light, the response rates of the Central North and North regions are fairly good. Aside from the Central South, all regions of the 2014 nonprofit survey are within a few percentage points of their relative population. The response rate for Central South seems surprisingly low given its population and proximity to Toronto.

The North and Central North regions show the lowest response rates, at 9% and 8% respectively.

Social Enterprise Subsectors by Region

Subsectors in which social enterprises operate differ according to geographical spread. Respondents from some subsectors are more likely to be located in certain regions.

Over three fifths (62%) of respondents from the arts and culture subsector are located in either the Eastern or South-Western regions. Those from the employment subsector are fairly concentrated in Toronto (42%), with no representation in the Central North and North. Farmers' market respondents are about twice as likely to be located in the Central South, Eastern and South-Western regions compared to other subsectors. Over half of housing respondents (55%) are located in the Central South and Toronto regions (i.e. the GTHA), while less than a fifth (17%) are in the Central North and North. Those in the miscellaneous sector are fairly dispersed, with slightly more representation in the Eastern and Toronto regions. Interestingly, compared to all other sectors miscellaneous has the highest Northern representation.

Over three fifths (62%) of respondents from the arts and culture subsector are located in either the Eastern or South-Western regions.



>> For a detailed look at the regional distribution of non-profit SEs by their subsector, see Appendix I.

Region & Age of Social Enterprise

The relationship between region and age of social enterprise is less varied than that of region and sector; however some significant differences are found.

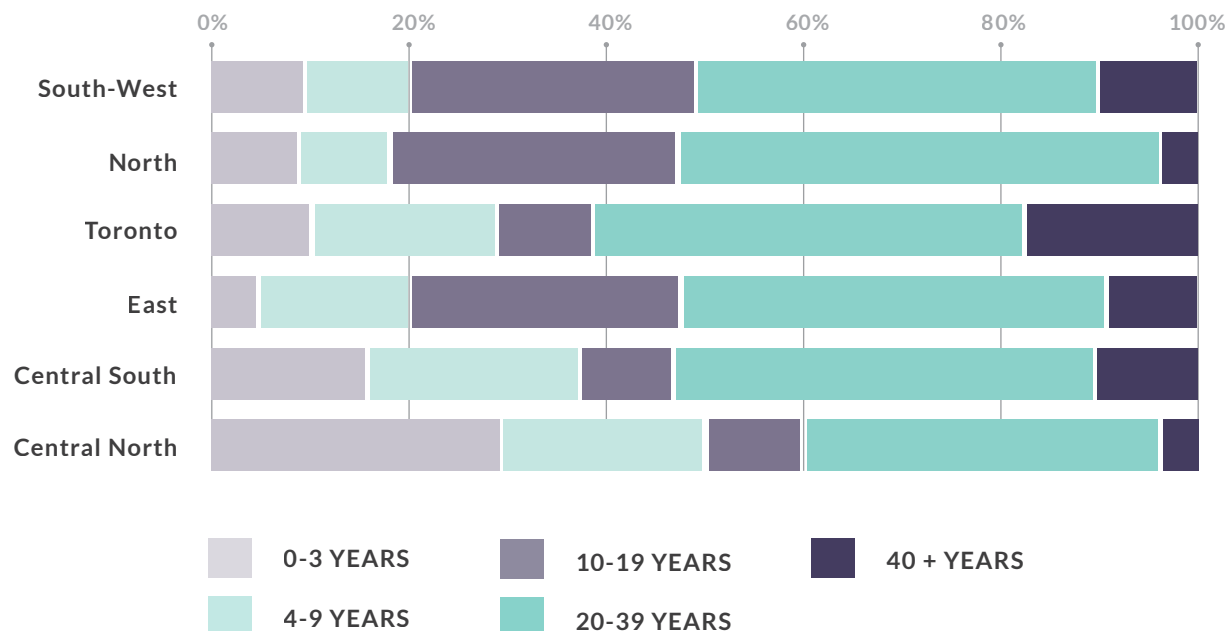
Toronto has the largest proportion of older social enterprises (56% of respondents are 20 years or older), while the Central North region has the largest proportion of younger ones (50% of respondents are under 10 years). The Central South region has the second largest proportion of younger social enterprises (37% of respondents are under 10 years).

Region & Purpose

In analyzing the link between region and purpose, social purpose is the most commonly identified with and is similarly high among all regions; to better compare the remaining purposes it is removed from the following chart.

Cultural purpose is fairly common across regions and does not drop below 30% of social enterprises identifying as having a cultural purpose. However, respondents from the Central North (54%), North (48%) and East (44%) tend to identify with it more so than other regions. Respondents from the Central North are much more likely than those from other regions to identify with having an environmental purpose (63%) and a substantial proportion from the South-West region do as well (41%). Respondents from the Toronto and Northern regions are least likely to identify with income generation purposes (at 15% and 7%) and most likely to identify with employment purposes (at 32% and 31%). Those identifying with a training purpose are also most common in Toronto, although it is generally low across the regions.

REGION AND AGE



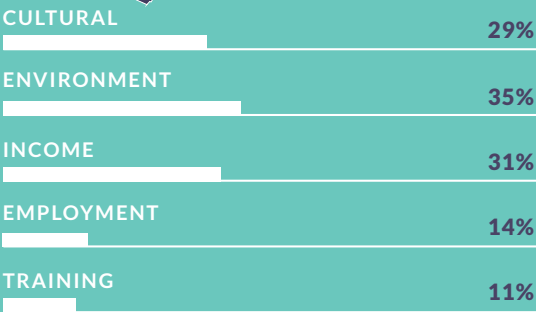
REGION & PURPOSE MAP



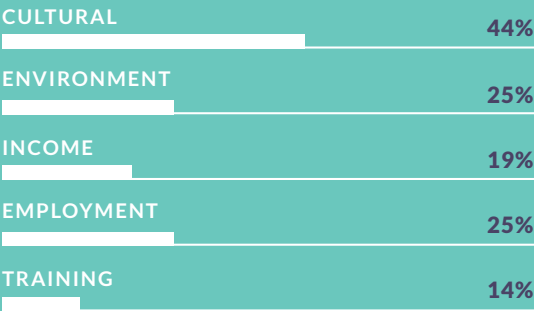
Central North



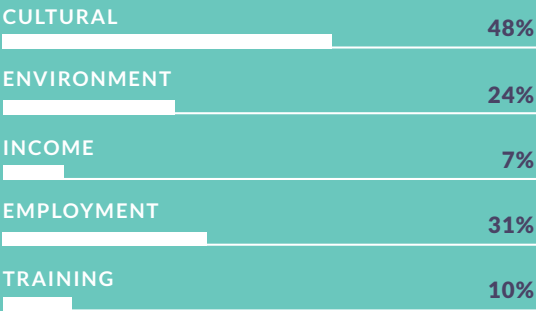
Central South



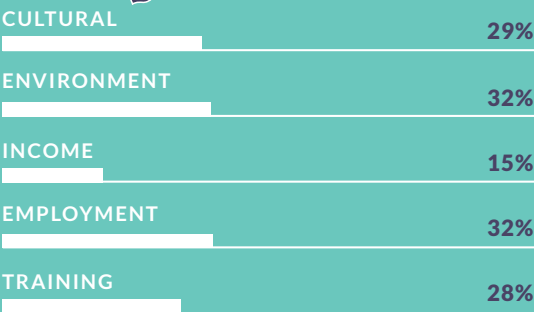
East



North



Toronto



South-West



Region & Groups Served

Families are the most commonly served target population across all regions. This is particularly true in the Central North (69%) and Central South (60%) where families receive the highest proportion of service from respondents compared to all other groups in all other regions. Low income individuals, seniors, women and youth are also commonly served across all regions, whereas refugees and people with addictions are least commonly served. Compared to other regions, the Toronto and Central South regions provide more services to immigrants and ethnic groups.

The North region illustrates an interesting break in overarching trends: whereas aboriginal populations and people with addictions are low on the list for most regions, they are some of the most served groups among responding SEs in the North.

Note that the target group 'All people in a particular place/community' has not been included in this analysis since it is the number one target group identified across all regions.

Respondents from the Central North are much more likely than those from other regions to identify with having an environmental purpose (63%)

REGION & GROUPS SERVED

REGION	HIGHEST 3	LOWEST 3
CENTRAL NORTH	Families, Low Income, Seniors	Physical Disabilities, Immigrants, Addiction
CENTRAL SOUTH	Families, Low Income, Seniors	Aboriginal, Addiction, Refugees
EAST	Youth, Women, Families	Aboriginal, Refugees, Addiction
NORTH	Aboriginal, Families, Low Income	Ethnic Group, Immigrant, Refugees
TORONTO	Youth, Low Income, Employment Barriers	Addiction, Refugees, Children
SOUTHWEST	Low Income, Women, Youth	Immigrants, Ethnic Groups, Refugees

4.2.2 Rural-Urban Comparison

A rural or urban status is assigned to respondents according to the population of the town or city they reported. According to the government of Ontario, those located in a city with a population of 100,000 or greater are defined as urban.

Rural and urban social enterprises face different contexts and challenges. In many ways, rural social enterprises must overcome greater barriers to success. The Social Enterprise Rural Alliance outlines some of these concerns:

“Rural communities across the country face a range of pressures including disappearing primary industries, low incomes, out-migration of youth to urban areas, aging populations, lack of affordable housing, increasing unemployment, disparity between the rich and the poor, environmental degradation, and downloading from provincial and federal governments. With limited resources, the vitality and stability of these communities are being threatened. This combination of social and economic needs in rural communities can be met simultaneously through social enterprise.” (SERA)

The economic disparities between urban and rural areas are recognized as an important issue in Ontario, and one that the social economy is uniquely suited to addressing.

All of the results in the Rural-Urban comparison section represent the responses of 449 nonprofit social enterprises that do not provide child care services, unless otherwise noted. See the Child Care section for rural-urban comparisons for that subsector.



>> Refer to Appendix M for a link to information on the work of the Rural Social Enterprise Constellation in Ontario.

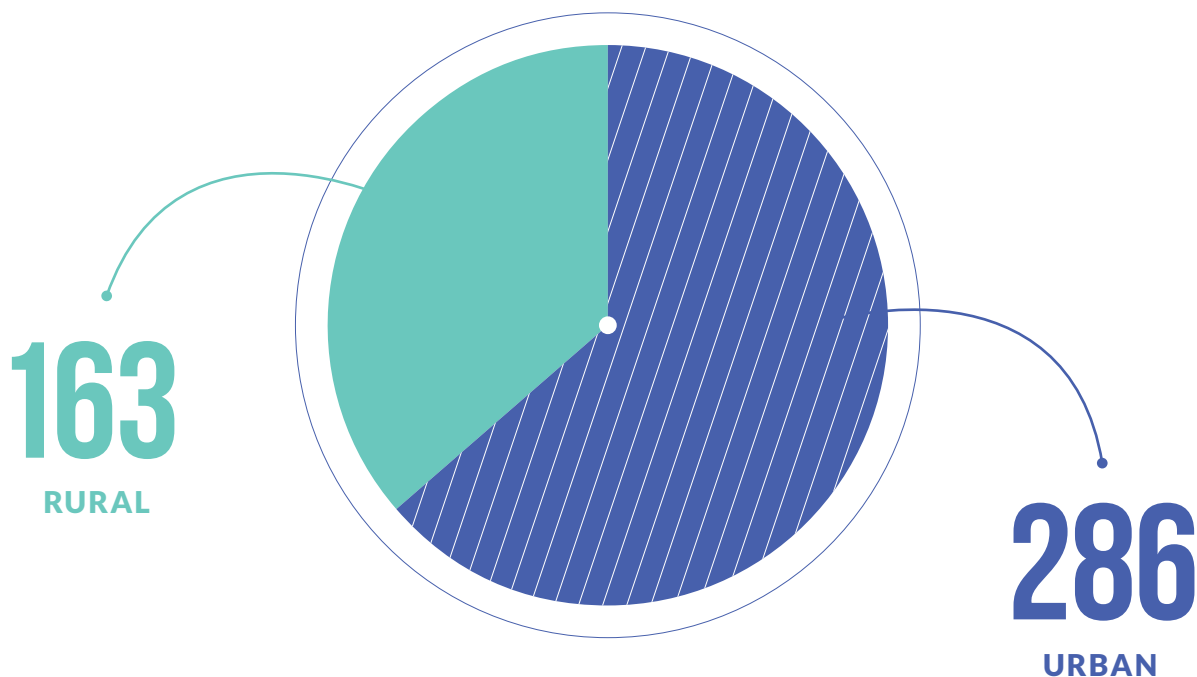
About one third of responding nonprofit social enterprises are rural-based.

NONPROFIT SOCIAL ENTERPRISES BY URBAN/RURAL STATUS

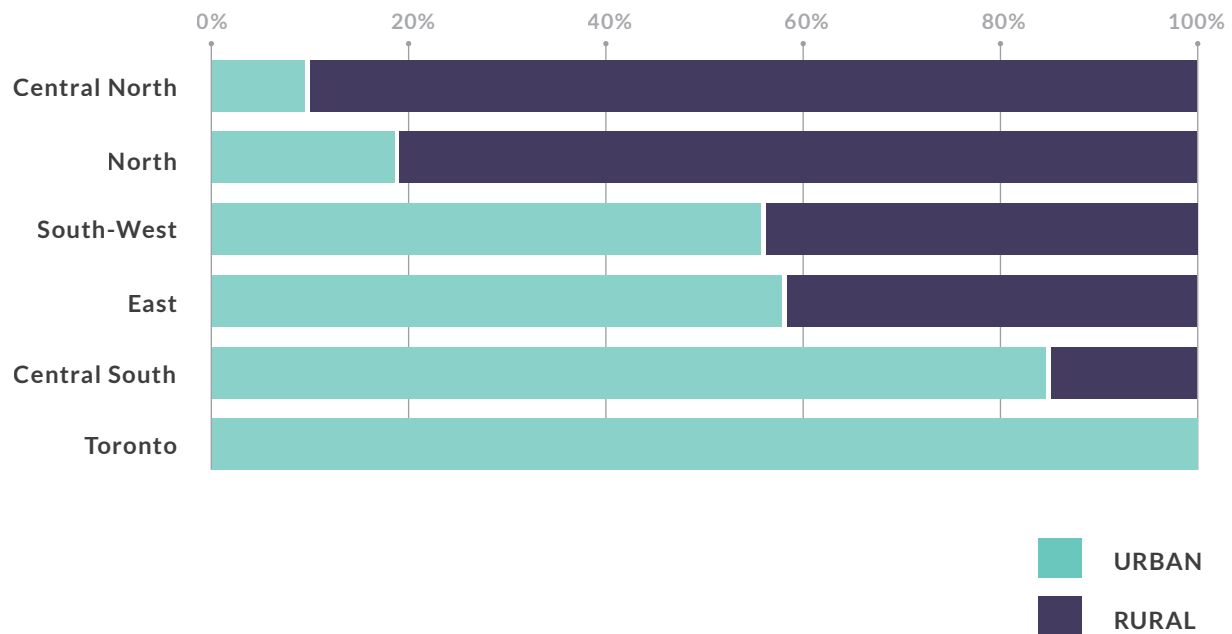
About one third of responding nonprofit social enterprises are rural-based. Assuming again that the prevalence of social enterprise is positively correlated with population size, it can be compared to Ontario's distribution of rural and urban populations. According to Statistics Canada, in 2011 about 60% of

Ontarians lived in an urban center with 100,000 people or more (Statistics Canada, 2011). In this light, the rural response is only slightly under-represented here.

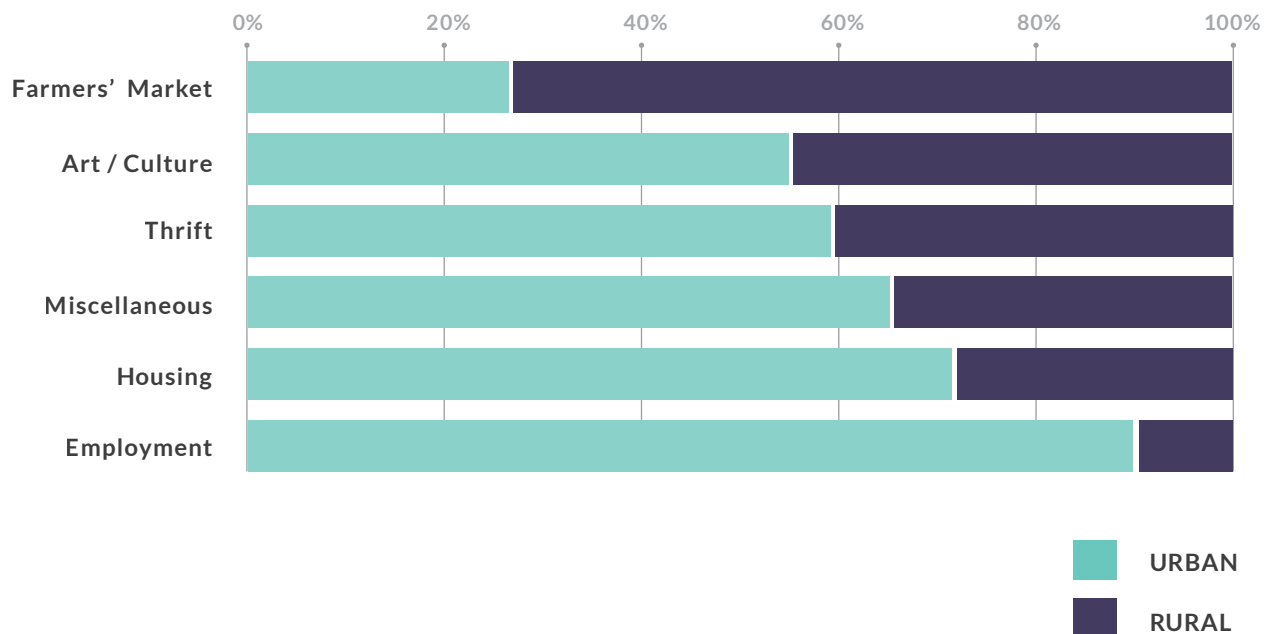
Rural or urban status varies considerably according to regions and subsectors.



RURAL / URBAN STATUS & REGION



RURAL / URBAN STATUS & SUBSECTOR



The majority of survey respondents from the Central North and North regions are rural (91% and 81%), while the majority of those in the Central South and Toronto regions are urban (85% and 100%). Although the South-West and East regions have considerable rural populations as well, their cities are rather large compared to those of the Central North and North regions (see Appendix I). This probably accounts for larger urban response rates.

The largest proportion of rural nonprofit respondents identify as farmers' markets (73%). Arts and culture and thrift subsectors are also considerably rural (44% and 40%). Miscellaneous is about a third rural (35%), which is very close to Ontario's overall rural /

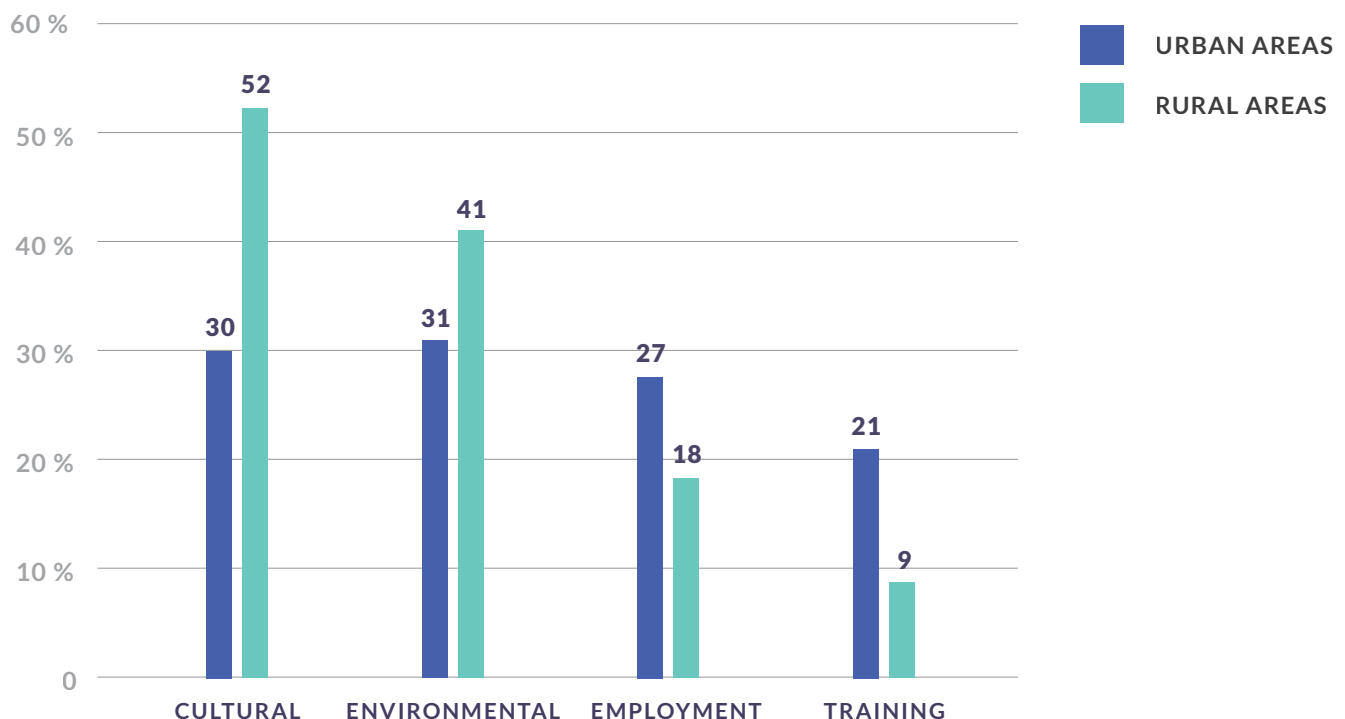
urban population split. Housing and employment subsectors are the least rural (27% and 12%).

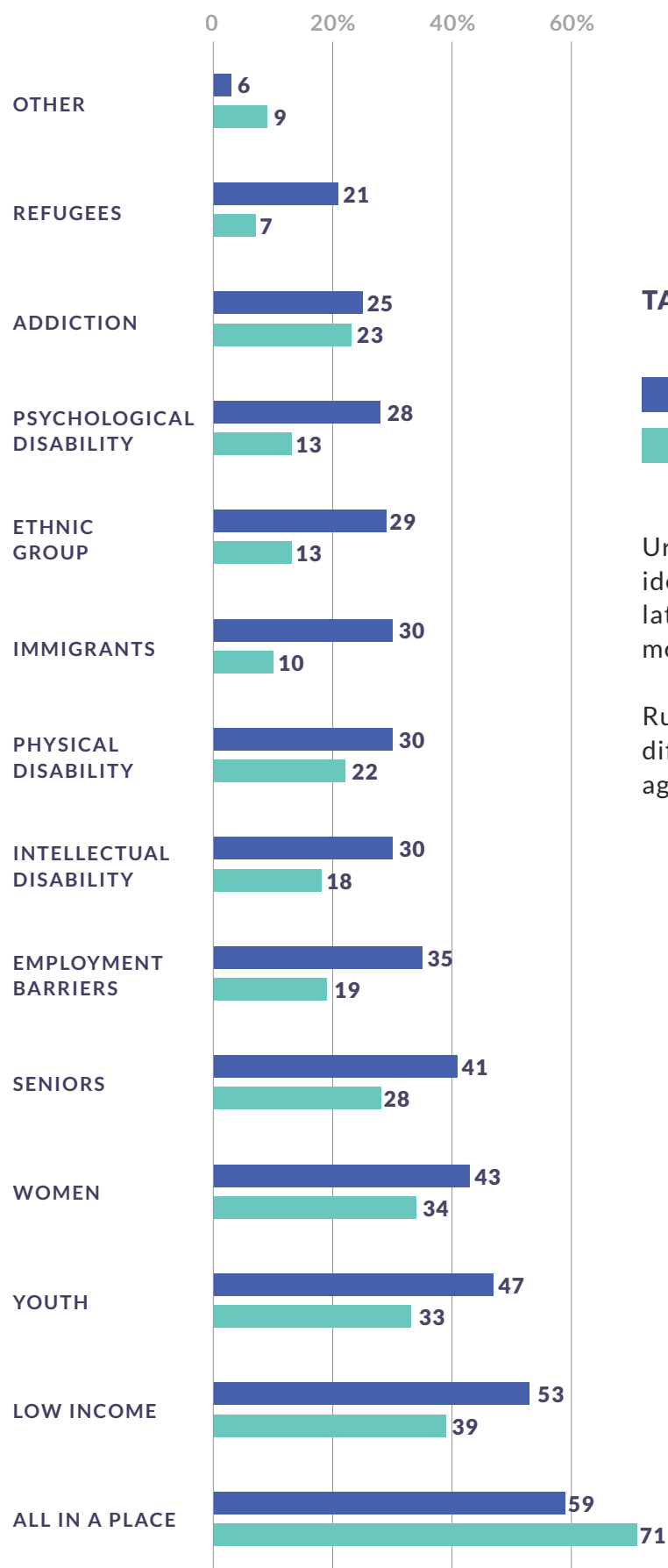
Rural/Urban status & Purpose

Social and income generation purposes are almost equally likely to be selected by both urban and rural social enterprises.

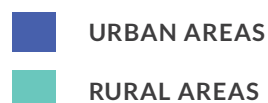
Cultural and environmental purposes are more likely to be selected by rural respondents, while employment and training purposes are more likely to be selected by urban respondents. Urban respondents are fairly evenly distributed in their purpose identification while rural respondents show greater differentiation.

URBAN/RURAL STATUS & PURPOSE





TARGET POPULATION



Urban social enterprises are more likely to identify with a wider variety of target populations whereas rural social enterprises are more likely to target a particular community.

Rural and urban social enterprises do not differ significantly in their legal structure or age of enterprise.

Comparing Economic Impact of Rural and Urban Social Enterprises

The table below represents responses from nonprofit SEs with n being the number of respondents providing information in that category .

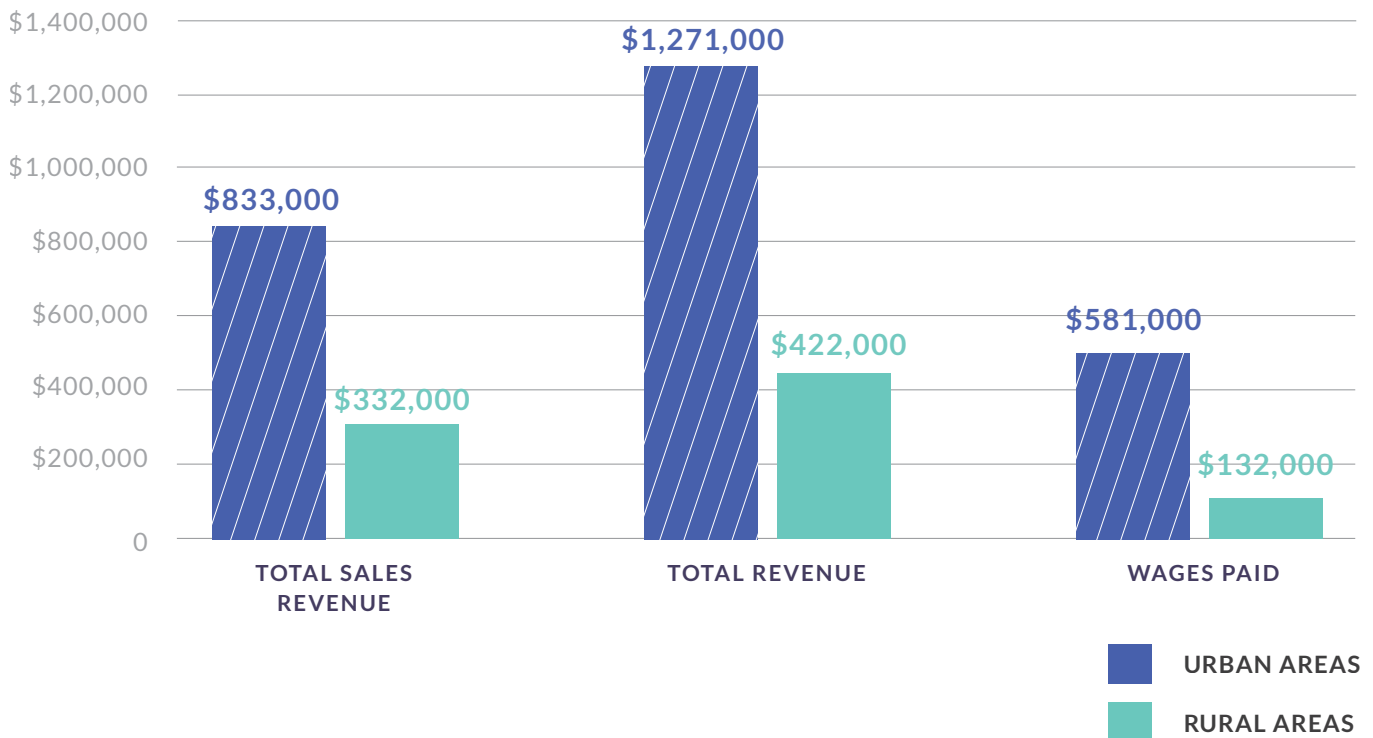
Employees here include full-time, part-time, seasonal and contractors or freelance employees. Like the average numbers for all employees, rural averages for full and part-

time employees are just under half of urban averages. There is less of a gap for seasonal employees, for which rural SEs have an average of 2.4 employees compared to their urban counterparts which have 3. Rural SEs employ far fewer contractors for which their average is a little less than one third of urban average numbers.

ONTARIO'S NONPROFIT SOCIAL ENTERPRISES: PEOPLE TRAINED, EMPLOYED, & SERVED IN 2014

	RURAL AVERAGE	URBAN AVERAGE	n=	RURAL TOTAL (at least)	URBAN TOTAL (at least)	n=
TRAINED	31	139	391	4,000	36,000	391
EMPLOYED	14	31	250	1,400	6,800	398
SERVED (Excluding Customers)	1,800	5,200	392	240,000	1,400,000	392
VOLUNTEERS ENGAGED	42	69	256	4,900	16,000	351

RURAL / URBAN NONPROFIT SEs 2014 FINANCIAL SUMMARY (n=298)



A higher percentage of rural SEs engage volunteers (95% vs 85%), however, on average, urban SEs engage almost twice as many volunteers as rural SEs.

A total of 298 responding nonprofit social enterprises (excluding child care providers) provided complete financial data for this survey. Rural respondents generated a higher percentage of their revenue through the sale of goods and services, but used considerably less of their revenue for wages - a full 30% less than urban respondents.

On average, urban responding SEs receive about ten times more in grant revenue compared with their rural counterparts. Average grants received from parent organizations are about four times higher for urban responding

SEs. However, rural SE parents are proportionately far more generous. On average, rural respondents receive approximately 43% of their total grants from their parent whereas for urban SEs this is just 17%. Despite their average sales revenue being two-and-a-half times less than urban organizations, rural responding SEs give back more to their parent organizations - \$26.9K compared to \$18.6K. As a percentage of total revenue, this is four times higher (8% vs 2%).

When grant revenues are included, rural responding SEs are less likely to break even than urban responding SEs (82% vs 66%). However, based on sales revenue alone, the picture evens out and approximately half of all responding SEs, rural or urban, report breaking even in 2014. Rural and urban

respondents also differ widely in their profitability. On average, urban SE's net profit (all revenue – all expenses) is about one-and-a half times higher than that of rural respondents (\$13K vs \$9K). Rural responding SEs, however, are far less grant-dependent and their profit (or losses) without grants are a thirteenth of that of urban SEs (-\$25K vs -\$315K).

For the most part, urban and rural responding SEs are quite similar in where they access grant funding. However, urban SEs are ten times more likely to receive grants from banks and rural SEs are ten times more likely to access Community Futures grants. Urban respondents are also one-and-a-half times as likely to receive a grant from a parent organization (5% vs 3%) and almost twice as likely to cite other sources of grants not listed in this

On average, rural respondents receive approximately 43% of their total grants from their parent whereas for urban SEs this is just 17%.

survey (8% vs 4%). The percentage of rural and urban responding SEs that receive no grants of any kind is similar although rural organizations are slightly more likely to report receiving no grants in 2014 (37% vs 33%). The purposes of the grants was also similar except that urban responding SEs are one-and-a half times more likely to use grants for research and development (28% vs 19%).

When grant revenues are included, rural responding SEs are less likely to break even than urban responding SEs.

The number of responding SEs that access loans is too small to be statistically significant, but the results that are available appear to indicate that urban SEs are twice as likely as rural SEs to access loans from the federal and provincial governments and credit unions. They are just as likely as rural respondents to access loans from municipal governments and are seven times more likely to receive loans from corporations. Rural SEs, on the other hand, are more than three times as likely to receive loans from a parent organization or Community Futures Development Corporation and more than twice as likely to receive loans from individuals. The overall percentage of rural and urban SEs accessing loans in 2014 is similar (25%) and those that accessed loans report using them for similar purposes.



>> For a more detailed financial comparison of rural and urban SEs, see Appendix K.

Rural and urban challenges compared

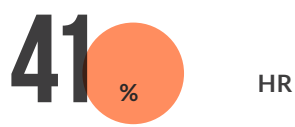
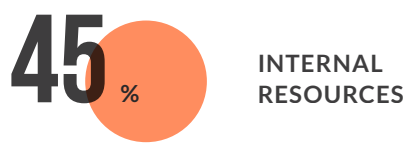
Rural and urban social enterprises differed in rating their most pressing challenges. Both rural and urban SEs included access to grant capital, internal expertise to drive the SE and internal resources in their top 5 challenges. Rural SEs also included board involvement and advertising and publicity whereas urban SEs included business planning and HR.

Social enterprises operating in rural and remote communities also face the challenge of geographic isolation which affects customers' ability to come to them, especially in winter or in bad weather. Transportation and shipping costs are also high for remote and rural enterprises.

GREATEST CHALLENGES FOR RURAL SOCIAL ENTERPRISES



GREATEST CHALLENGES FOR URBAN SOCIAL ENTERPRISES



Rural and urban resources needed compared

Rural and urban organizations do not differ significantly on which resources they find to be most helpful. Both list online and offline educational resources, workshops and specific tools to enhance staff capacity as most helpful for their development.

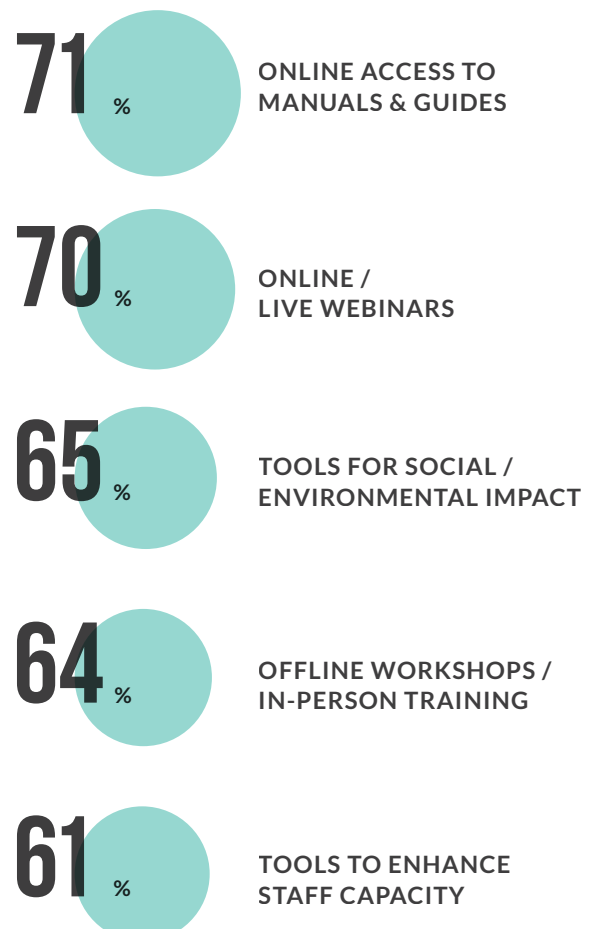
Only urban respondents identify resources on social and/or environmental impact measurement tools in their top five most helpful resources. On the other hand, rural respondents consider financial planning support and training to be a more important resource.

In looking at plans for business growth, urban responding SEs are 10% more likely than rural respondents to see revenue growth as a part of their strategic plan over the next two years as moderately or very important. They are also 7%-8% more likely to rate public and corporate contracts as important parts of that strategy. Rural respondents are 6% more likely to rate business from individual customers as important in their growth strategies.

MOST HELPFUL RESOURCES FOR RURAL SEs



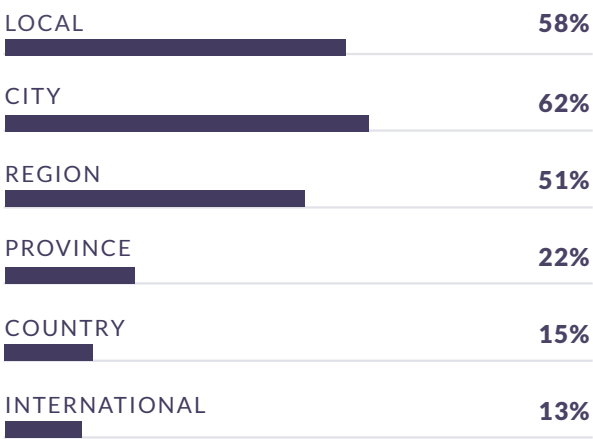
MOST HELPFUL RESOURCES FOR URBAN SEs



4.2.3 Geographic Scale

Respondents were asked to identify the geographic scale of their social enterprise; options included local, city-wide, regional, provincial, national and international. Unless otherwise noted, these results only represent the responses of 449 nonprofit organizations that do not provide child care services. For information on the scale of operations for nonprofit child care organizations, see the Child Care section. To learn about for-profit scale of operations, see the For-profit SE section.

NONPROFIT RESPONDENTS BY GEOGRAPHIC SCALE OF OPERATION



The city-wide scale of operation is most common (62%) , followed closely by a local/neighborhood scale (58%) and a regional scale (51%).

The city-wide scale of operation is most common (62%) , followed closely by a local/neighborhood scale (58%) and a regional scale (51%). Less than a quarter of respondents operate at the provincial scale and less than a fifth operate at national or international scales.

At the local and city-wide scales, there is no significant relationship with rural/urban status. However, we can see that rural respondents are slightly more likely than their urban counterparts to operate at the regional scale. Conversely, urban respondents are much more likely to operate at any of the larger scales.

In comparing scales of operation among the regions, it is apparent that those with the fewest respondents that operate at the provincial, national and international work correspond with those that are most rural – the North and Central North. On the other hand, the most urban regions, Toronto and Central South, have the most respondents operating at broader scales.

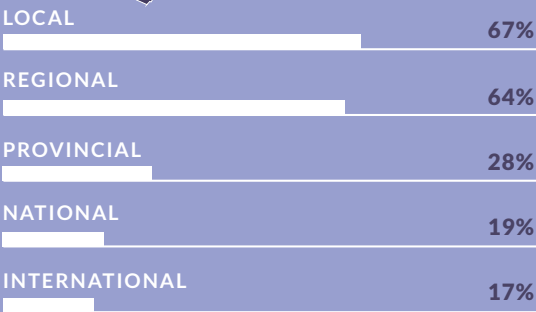
SCALE OF OPERATION & REGIONS



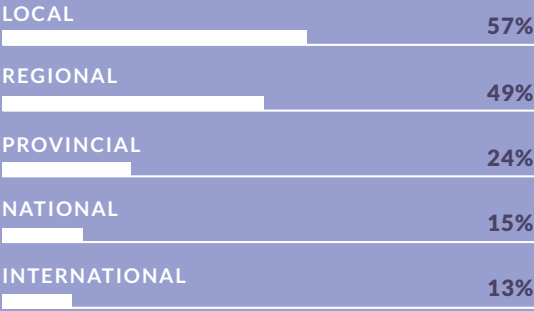
Central North



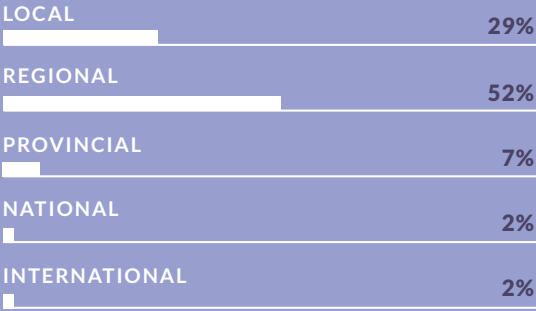
Central South



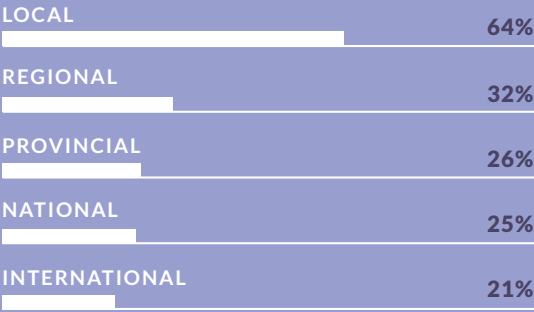
East



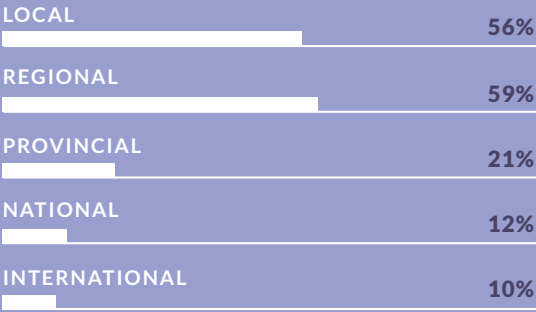
North



Toronto



South-West

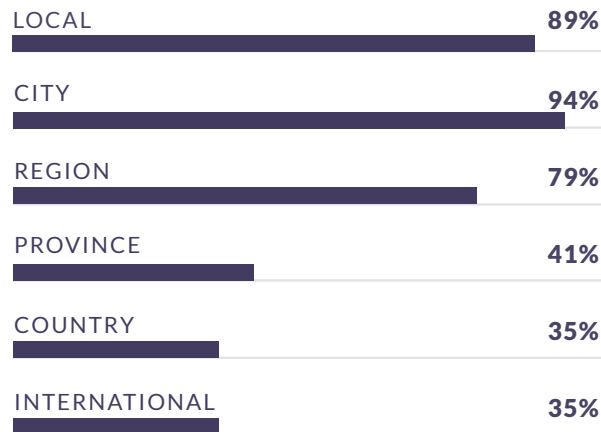


SCALE OF OPERATION & SUBSECTOR

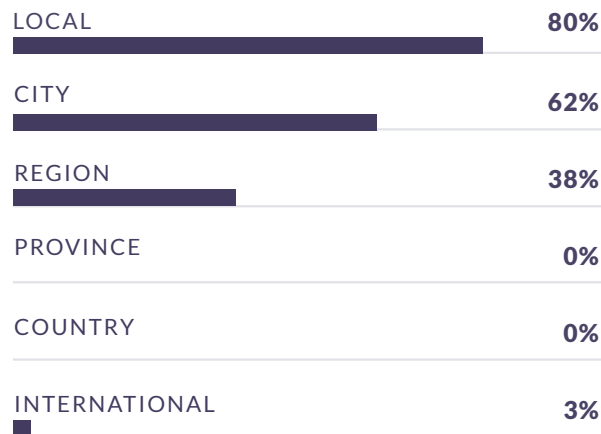
Respondents from the thrift and arts and culture subsectors are much more likely than others to operate at the upper level scales (provincial, national, international) and also have the highest proportions of regional focus. Those from the housing, employment and farmers market subsectors are least likely to operate at broader scales, and in the case of housing and farmers’ markets, most respondents are concentrated at the local and city-wide levels.



Thrift

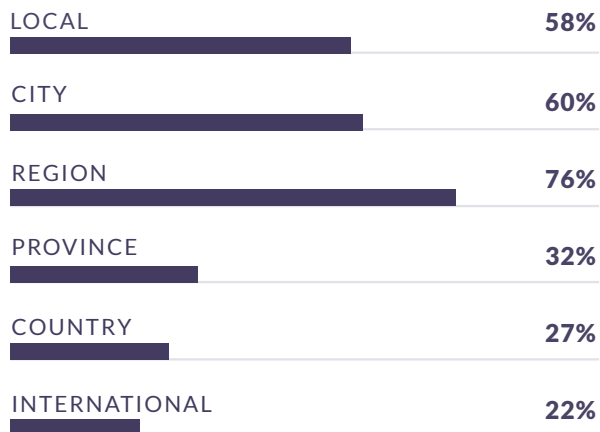


Farmers' Market

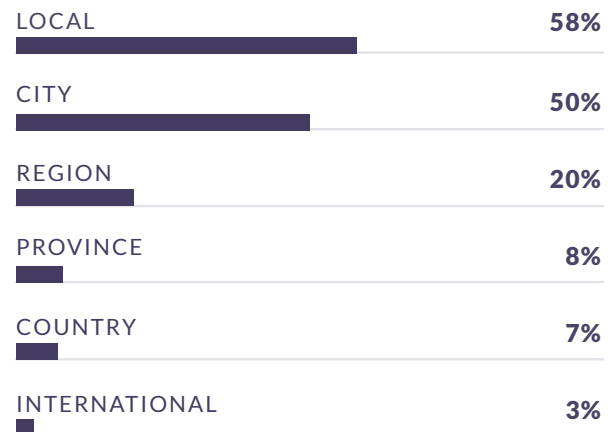




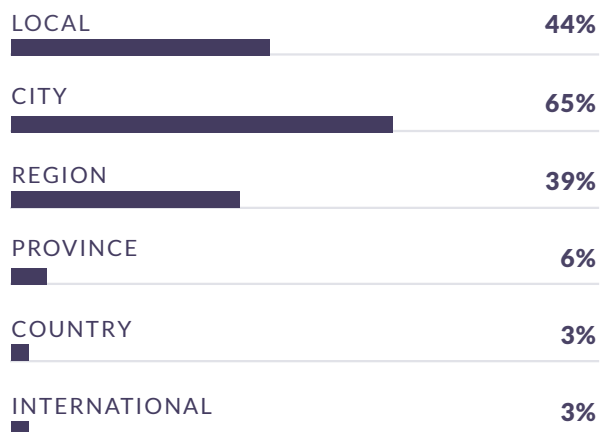
Arts and Culture



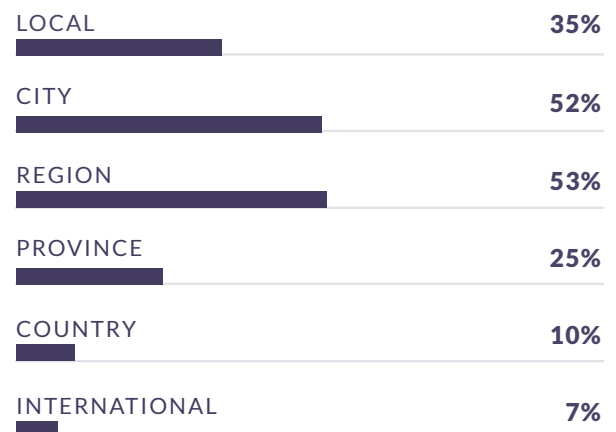
Housing



Employment



Miscellaneous



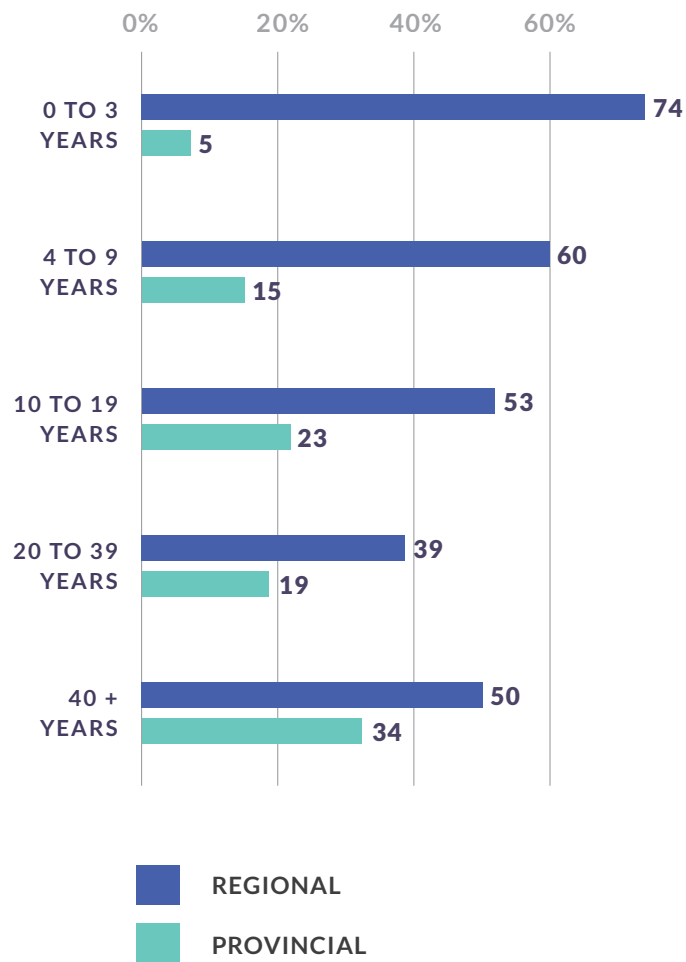
SCALE OF OPERATION & AGE

Age of a social enterprise has a strong effect on whether these enterprises operate on regional or provincial levels. Respondents whose social enterprises operate at a regional scale tend to be younger, while those working at a provincial scale tend to be older.

GEOGRAPHIC SCALE & PURPOSE

When considering purpose, only SEs identifying with the environmental and income generation purposes are found to have a statistically significant relationship with geographic scale of operation. Respondents choosing either of environmental and income generation purposes are almost twice as likely to operate at the local, city and regional levels as opposed to provincial, national or international levels.

SCALE OF OPERATION BY AGE



>> See Appendix I for graph

4.3 Economic Impact

Numbers over 1,000 in this section are rounded off; for 1,000 to 9,999 to the nearest 10, for 10,000 -99,000 to the nearest 100, for 100,000 to 999,000 to the nearest 1,000 etc. . Percentages over 10% are rounded to the nearest whole number.

4.3.1 Employment & Volunteerism

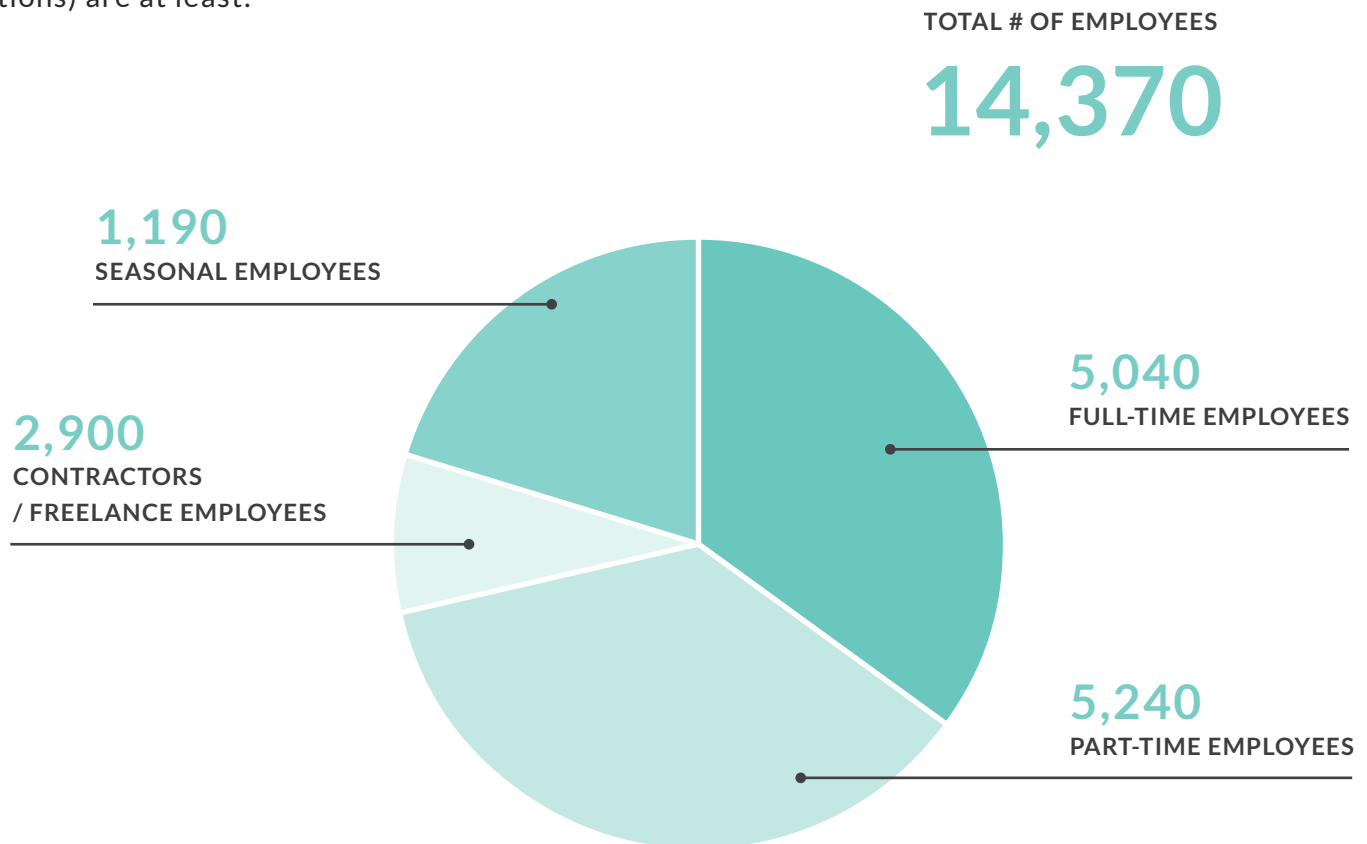
The table below represents responses from nonprofit, nonprofit child care and for-profit (known) SEs.

ONTARIO'S SOCIAL ENTERPRISES: PEOPLE TRAINED, EMPLOYED, & SERVED IN 2014

	Average	Total of All Respondents (at least)	# of Respondents
TRAINED	115	56,700	n = 491
ESTIMATED FTEs (Full-Time Equivalent Employees)	18	6,200	n = 337
SERVED (Excluding Customers)	8,400	4,120,000	n = 492
VOLUNTEERS ENGAGED	60	25,000	n = 416

Employees

The total numbers of employees (by type) for the entire sample (492 respondents consisting of nonprofit, child care and for-profit organizations) are at least:



The total number of full-time volunteers for the whole social enterprise sector respondents in 2014 was at least 10,200 while almost twice as many part-time volunteers were engaged (at least 14,800). Full-time volunteers are those that worked over 10 hours a month and part-time are volunteers that worked less than 10 hours a month.

On average, organizations aged 40 years and older employ more full-time, part-time and seasonal workers compared to younger enterprises. They also engage almost twice the number of volunteers on average (108) compared to the average for the rest of the nonprofit social enterprise sector. Nonprofit social enterprises that have been operating for 10-19 years employ the highest average number of contract employees (20).

4.3.2 Financials

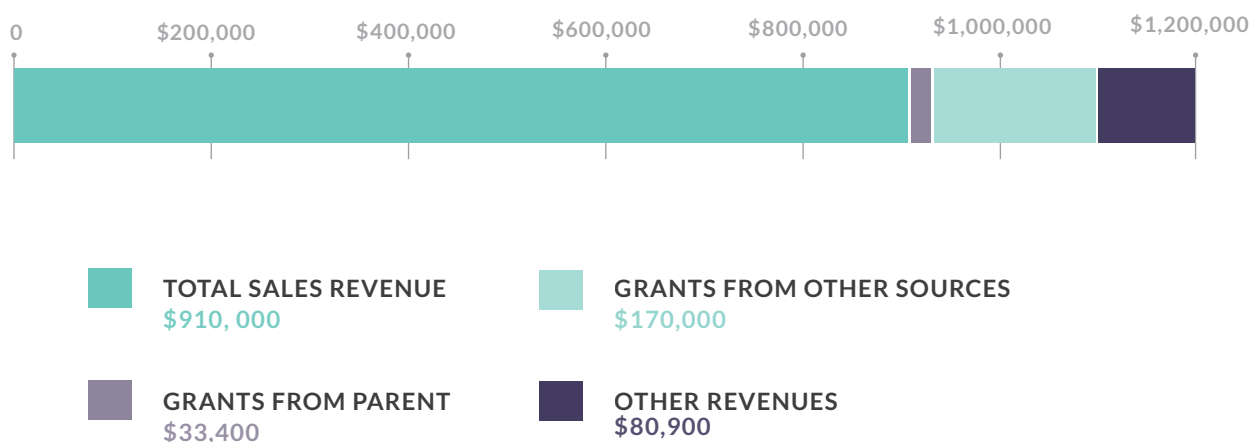
There were 312 nonprofit (including child care) and 47 for-profit respondents that provided complete financial data for the year 2014. When discussing the Ontario social enterprise sector as a whole, responses from nonprofit, child care providers and for-profit (known) SEs are reported. Unless otherwise noted, nonprofit result do not include child care responses. To learn about for-profit and child care financials in more detail, see their separate sections further on in this report.

Across the province, at least \$252 million was paid out in wages and salaries for social enterprise employees in 2014 by all responding SEs. Wages and salaries are the single largest expense for social enterprises.

- ▶ Ontario's responding social enterprises earned at least \$489 million in total revenues in 2014. About 78% (\$380 million) of this revenue comes from the sale of goods and services while nearly 17% (66,100,000) is from grants.

AVERAGE REVENUES (2014): ONTARIO SE SECTOR

(For-Profit & Nonprofit -Including Child Care, n=369)



The respondents providing financial data (n=369) reported a cumulative net profit of \$459 million during 2014. However, if grants are excluded from the analysis and only sales revenues are considered, this drops to a loss of \$187,000. All three sectors report losses without grants although nonprofits, excluding childcare, have the highest losses.

Over three quarters of nonprofit respondents' social enterprises broke even in 2014 but only a little over half broke even without grants. On the other hand, just over half of for-profit respondents (n = 47) report breaking even in 2014, dropping just above two fifths (42%) when grants aren't included.

Grants & Loans

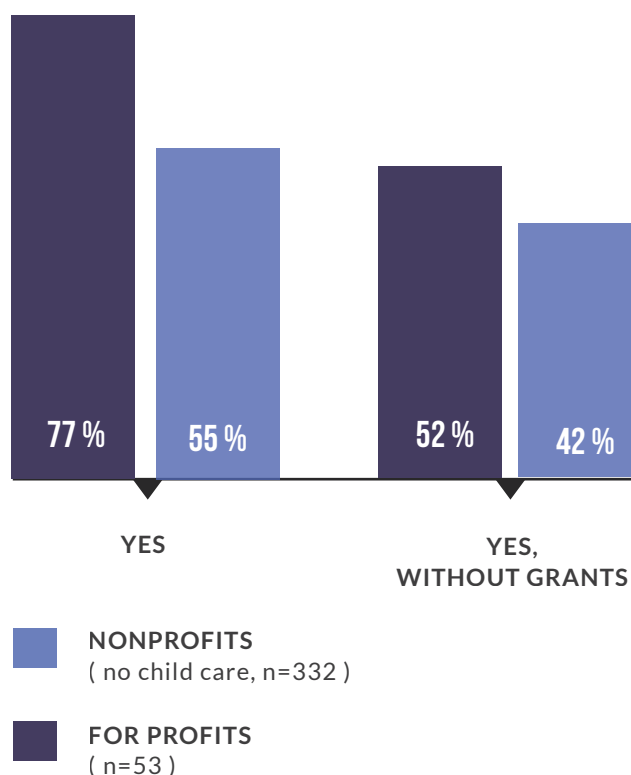
The survey asked respondents to indicate the sources of their loans and grants for 2014 as well their purposes for these types of financial resources.

Sources

Two-thirds of nonprofit social enterprise respondents report receiving grants while only one quarter report receiving loans, highlighting the low uptake of loans among nonprofit social enterprises. However there seems to be a slight increase in loan uptake among nonprofit SEs, when comparing with the 2012 survey results where 16% of nonprofit respondents reported receiving loans⁵.

How does the age of a social enterprise affect the type of funding they receive? The most common source of grants for nonprofit social enterprise respondents that have been in operation for 0-3 years are foundations and private individuals. Social enterprises that have been in operation for 4-9 years are most likely to receive grants from private individuals – over half of these enterprises

SEs THAT BROKE EVEN IN 2014



received grants from this source in 2014.

Almost half of nonprofit respondents that have been in operation for 40 years or more receive grants from the federal government.

Overall, nonprofit social enterprises are less likely to receive loans compared to grants. Nonprofit SE respondents that have been in operation for 40 years or more are the most likely to take out loans compared with other nonprofit SEs - just under half of nonprofit SEs over 40 years old have loans. The most common source of loans for these social enterprises are credit unions, followed by banks and foundations. Startup nonprofit SEs (0 -3 years) and those 10-19 years are next most likely (both 30%) with the least likely being the 4-9 years (13%) and 20-39 years (17%). Nonprofit SEs that have been

in operation for 0-3 years are most likely to take out loans with private individuals compared with all other age groups.

Purposes

Three quarters of nonprofit SE respondents who received grants in 2014 use those grants for operational expenses. Technical assistance is the second most common purpose for grants (39%) followed by capital projects (33%). Loans are most commonly used for capital projects, with just under half of nonprofit respondents with loans citing this purpose for their loans. Just over a third of these respondents use them for operational expenses.

The most common purpose of grants across nonprofit social enterprise age groups is for operational activities. Almost 60% of nonprofit respondents that have been in operation for 4-9 years also use grants for technical assistance. Younger (0-3 years) social enterprises are more likely to use grants for research and development. Nonprofit respondents that have been in operation for over 40 years are more likely to use grants for governance compared to other social enterprises.

Three quarters of nonprofit SE respondents who received grants in 2014 used those grants for operational expenses.

TOP SOURCES OF GRANTS FOR NONPROFIT SEs (no child care) n=369

TOP SOURCES OF LOANS FOR NONPROFIT SEs (no child care) n=369

Private Individuals – 32%	Banks – 9%
Provincial Government – 30%	Credit Unions / Caisses Populaires – 6%
Municipal Government – 27%	Corporations – 3%
Federal Government – 25%	Municipal & Federal Governments; Foundations; Private Individuals – 2% (tied)
Foundations – 24%	Provincial Government; Parent Organization – 1%

Nonprofit SE respondents that take out loans do so for operations or capital. Few cited technical assistance, IT or governance. “Other” was the third most commonly selected purpose. 69% of those that have loans and are over 40 years are most likely to use loans for operational expenses and capital projects. This is somewhat similar to those 0-3 years (operations 64% and capital 50%). Nonprofit SEs that have been in operation for 4-9 years are almost equally likely to use loans for any of these three purposes. Those 10-19 years old, while most likely to use loans for capital, are more likely to site other than operations.

To learn about the economic impact of specific social enterprise subsectors in more detail, refer to the For-profit, Nonprofit Child Care and Francophone sections in this report and the subsector summary sheets available online at www.ccednet-rcdec.ca/en/toolbox/2015_Ontario_SE_Report-Feature_sheets



>> Details of Average Revenues & Expenses by Subsector are in Appendix D

Details of Employment & Financial Averages by Age of Social Enterprise are in Appendix E

For more detailed breakdown of the employment and financial averages across nonprofit, child care and for-profit respondents, see Appendix F

	OPERATIONS	CAPITAL	OTHER
All	35%	40%	18%
0-3 Years	64%	50%	9%
4-9 Years	11%	13%	11%
10-19 Years	19%	48%	32%
20-39 Years	25%	23%	19%
40+ Years	69%	69%	6%

4.4 Challenges and Opportunities

4.4.1 Challenges

In order to obtain a better understanding of the issues facing Ontario's social enterprises, respondents were asked to rate 17 potential challenges related to the governance, financial, operational and marketing elements of a social enterprise. These challenges are rated on a scale as: not a challenge, a small challenge, a moderate challenge, a significant challenge or not applicable. Unless otherwise specified, the challenges reported here include only those that respondents considered moderate or significant. The challenge of 'Brand recognition and awareness' is included for the first time in this survey. Unless otherwise noted, nonprofit results do not include nonprofit child care due to sampling differences.

A frequent comment in this survey is that funders do not typically recognize social enterprise as a model to meet community needs.

In their comments, several respondents mention trying to do as much as possible with limited resources, budget and time. Government downloading has led to a higher demand for services by vulnerable populations with social enterprises having difficulty finding money and time for marketing, increasing their consumer base and recruiting high-quality staff. This challenge is exacerbated for volunteer-run organizations or those operating

a social enterprise in addition to their other programs or services to achieve their mission.

Access to financing

Due to the loss of core government funding for many organizations, access to capital is an ongoing challenge. It can be even harder for social enterprises to tap into existing funding sources because they often do not fit into traditional funding moulds.

Employment grants usually do not cover the salary for a dedicated person to manage the social enterprise – a role often lacking in nonprofits operating social enterprises.

A frequent comment in this survey is that funders do not typically recognize social enterprise as a model to meet community needs – it is perceived as more of a traditional for-profit business providing limited community value. This view of social enterprise relates to the challenge of brand recognition and awareness.

The funding that is available poses additional issues for social enterprises. There is an underlying tension between the need for ongoing funding to keep services operating and pressure from funders for the enterprise to be sustainable. This may be unrealistic in cases where a social enterprise is operating under the umbrella of a nonprofit with many other programs and services to maintain.

The need for wrap around services increases the costs when working with people who are hard to employ and affects the profits of enterprises providing these social benefits. The promise of funding usually also involves conditions and hoops to jump through: one respondent said they frequently need to use several external resources (e.g. workshops, courses, consultants, etc.) to make progress on their social enterprise when accepting development funding.

Grant requirements are seen as changing constantly and seeming too specific, making it difficult for organizations to be eligible for funds for particular projects (e.g. to meet an expense need like equipment). Some respondents from arts and culture and renewable energy sectors see themselves as having less funding available compared to other sectors, finding that they are ineligible for some types of grants - accessibility was cited as an example. Employment grants usually do not cover the salary for a dedicated person to manage the social enterprise – a role often lacking in nonprofits operating social enterprises.

Internal Resources

Along with funding cuts, provincial downloading puts a high strain on organizations which lack the human and financial resources to keep up with the increased demand for their services. In an era of constantly changing technology, several respondents were concerned with the availability of up-to-date infrastructure and information technology for their social enterprise operations.

Human Resources

Sixty-seven percent (67%) of nonprofit child cares surveyed identify human resources as a moderate or significant challenge⁶. Many social enterprises express difficulty in finding enough high-quality workers (staff and volunteers) and in accessing funding for salaries for administrative work. An issue for groups with mostly older organizational members is a lack of resources for their succession planning.

67% of nonprofits surveyed identify human resources as a moderate or significant challenge.



>> For a more detailed comparison of for-profits, nonprofits and child care organizations, see Appendix G

TOP FIVE CHALLENGES FACING ONTARIO SOCIAL ENTERPRISES

(in descending order)

FOR-PROFIT SEs (known)	NONPROFIT SEs	NONPROFIT CHILD CARE
Cash Flow – 87%	Access to Grant Capital – 53%	Human Resources – 67%
Access to Grant Capital – 81%	Internal Expertise to Drive the Social Enterprise – 47%	Information Technology – 61%
Access to Loan Capital – 77%	Board of Directors Involvement – 46%	Business Planning – 52%
Sales – 69%	Internal Resources – 45%	Legal and Regulatory Considerations – 52%
Access to Customers – 68%	Advertising / Publicity; Business Planning (tied) – 43%	Access to Grant Capital – 50%

Brand recognition & awareness

Forty percent (40%) of nonprofit (excluding child care) and 65% of for-profit social enterprises identified brand recognition and awareness of social enterprise as a major challenge. The lack of a common understanding around social enterprise influences some of the other challenges such as access to funding, cash flow problems and recruiting skilled staff and volunteers. There is often the perception that social enterprise means an inferior product or service but many organizations have few, if any, marketing dollars to allocate to improving the image of their social enter-

prise. There is a call for information-sharing among those involved with social enterprise because there is also a lack of clarity about what this term means and where they fit with the public, private and community sectors.

While social enterprise has recently come into the provincial spotlight, collaboration can be a difficulty for social entrepreneurs. Respondents expressed the challenges of mapping out a path when working across sectors; some sectors often being resistant to change. The need for strategic planning within regions to avoid duplication was also identified.

How does age affect the challenges of social enterprise? Younger enterprises (established less than 3 years) are much more likely to identify legal and regulatory considerations and Internal expertise to drive their social enterprise (both 67%) as significant challenges. On the other hand, enterprises over 40 years old are more likely to identify with marketing challenges such as advertising/publicity (71%) and brand recognition and awareness (78%).

“Need to improve public awareness of the demonstrated value of the benefits provided through social enterprise activities; the importance of community-based investment and supporting local initiatives”

Challenges also vary by social enterprise subsector. While all seven identified subsectors consider access to grant capital as a significant challenge, this is even more so for the employment (72%) and arts and culture (73%) subsectors. Farmers’ markets are most concerned with advertising/publicity (55%) and access to customers (54%). For thrift stores, Internal expertise to drive the social enterprise is a significant challenge (89%). Housing co-ops are less likely to find this a challenge and focus more on Legal and regulatory considerations (39%).

For a more detailed look at the greatest challenges for each subsector, see the sector feature sheets here: www.ccednet-rcdec.ca/en/toolbox/2015_Ontario_SE_Report-Feature_sheets

The region where a social enterprise is located has a strong influence on the greatest challenges for these enterprises. Access to grant capital is the number one challenge identified by social enterprises in the Central North (79%), East (56%) and the Toronto (59%) regions. Board of Directors involvement is the top challenge for enterprises in the North (59%) and is also a significant concern for social enterprises in the Central North (77%), Central South (47%) and East (46%) regions. South-West is the only region to identify Brand recognition as one of their top five greatest challenges (49%).



>> For more information on regional differences, see Geographic Analysis: Regional Focus.



>> For a break-down of the top challenges for each region, see Appendix G.

4.4.2 Helpful Educational Resource Highlights

As the social enterprise movement has gained popularity in Ontario, there have been various provincial and regional initiatives to support the development and growth of these organizations. It is important to hear from social enterprises themselves which resources they would find most helpful to achieve their organizational mission. Respondents were presented with a list of 15 educational resources related to the governance, financial, operational and marketing elements of a social enterprise. The resources are rated on a scale as: not helpful, somewhat helpful, helpful, very helpful or not applicable. Unless otherwise noted, the resources reported here are those that respondents identified as helpful or very helpful.

Offline workshop/in-person training, online/live webinars, coaching, and online access to manuals and guides are included for the first time in the current survey. Unless otherwise noted, nonprofit results do not include nonprofit child care due to sampling differences.

For-profit social enterprises are much more likely to have an interest in resources on capital and social purpose investment opportunities

As with challenges, there are also very strong differences in the most helpful resources identified by for-profit and nonprofit social enterprise respondents. For-profit social enterprises are much more likely to have an interest in resources on capital and social purpose investment opportunities compared to nonprofit social enterprises. Both for-profit and nonprofit social enterprises identify educational resources and specific training as very helpful. However, nonprofits are more likely to prefer having this information available online either as a manual or webinar while for-profits prefer to have this support in-person through coaching.

Nonprofits are more likely to prefer having educational resources available online either as a manual or webinar while for-profits prefer to have this support in-person through coaching.



>> For a more detailed comparison of for-profits, nonprofits and child care organizations, see Appendix F

TOP FIVE HELPFUL RESOURCES FOR ONTARIO SOCIAL ENTERPRISES

(in descending order)

FOR-PROFIT SEs	NONPROFIT SEs (NO CHILD CARE)	NONPROFIT CHILD CARE
Capital and social purpose investment opportunities – 71%	Online access to manuals and guides – 69%	Online access to manuals and guides – 76%
Communications / public relations – 64%	Online / live webinars – 67%	Offline workshops/in-person training – 76%
Coaching – 59%	Offline workshops / in-person training – 65%	Legal and regulatory advice specific to SE – 71%
Tools to measure social and/or environmental impact – 58%	Tools to enhance staff capacity – 61%	Online/live webinars – 69%
Offline workshops / in-person training – 56%	Tools to measure social and/or environmental impact – 61%	Communications/public relations – 64%

Online or in-person resources & support

Responding nonprofit social enterprises in our sample identified online access to manuals and how-to guides as the most helpful resource for their development.

Online access to manuals and guides is considered the most helpful resource for social enterprise respondents in the Central South and Central North regions. This resource is the second most helpful resource identified by social enterprises in the South-West, North, Toronto, and East regions.

In-person workshops / offline training is considered one of the top five most helpful resources across all social enterprises.

In-person training /offline workshops

In-person training / offline workshops is consistently rated in the top five most helpful resources across all social enterprises, for-profit, nonprofit and nonprofit child care. This is consistent across more of the nonprofit subsectors than any other option with thrift and miscellaneous are the only exceptions.

Again, related to the issues of brand recognition, social enterprises indicate a need to increase customer awareness of the value of their work and the issues it addresses. Respondents also commented on the need for education among foundations and capital investors so that they see social enterprise as a legitimate model - not as a lucrative business providing meager community benefits.

Organizational growth/Capacity building

Tools for enhancing staff capacity are the fourth most helpful resource identified by Ontario nonprofit social enterprise respondents; particularly thrift stores (93%), arts and culture organizations (70%), and employment enterprises (72%). Specifically, they are looking for training for their directors and/or board in the areas of: governance, finance/fundraising and systems thinking.

Tools to measure social and/or environmental impact

Tools to measure social and/or environmental impact was in the top five helpful resources for both for-profit and nonprofit enterprises, although not childcare. The highest ratings were by thrift, employment and miscellaneous subsectors.



>> For a more detailed look at the most helpful resources for each subsector, access the sector feature sheets here: www.ccednet-rcdec.ca/en/toolbox/2015_Ontario_SE_Report-Feature_sheets

Tools to measure social and/or environmental impact in the top five most helpful resources for nonprofit and for-profit social enterprises

Younger enterprises were much more likely to identify resources on investment opportunities and financial planning as most helpful. Resources on social and/or environmental measurement tools are of most interest for enterprises aged 3 years or less (78%). These tools are still considered important for enterprises aged 10-19 years (58%) and 40 years and older (77%).

While coaching was mentioned frequently in the survey comments, enterprises aged 4-9 years are the only nonprofit age group to place it in their top five most helpful resources for development (76%).



>> For more information on regional differences see Geographic Analysis: Regional Focus.

Though not quite as strong a factor as for the challenges faced by social enterprises, the region where a social enterprise is located is a key influence on which resources are considered most helpful for an enterprise's development. Social enterprises in the North are the only respondents to identify resources on capital and social purpose investment opportunities in their top five most helpful resources. However, financial planning support and training is considered in this list for social enterprises in Toronto and Central North regions.

New SEs want resources on financial planning and tools to measure impact

Other frequently mentioned resources not listed above include:

- ▶ More resources for funding opportunities
- ▶ Information sharing among the sector/ subsectors, networking, sharing best practices/lessons learned
- ▶ Remove barriers for partnerships between for-profit and nonprofit social enterprises
- ▶ Have a staff ombudsman for social housing providers (housing-specific)
- ▶ Help applying for municipal grants: not clear how these apply to nonprofits, especially in certain sectors like early development
- ▶ Help with sales
- ▶ Help with business development strategy
- ▶ Mentoring opportunities



>> For a break-down of the most helpful resources for each region, see Appendix G.

4.4.3 Strategies for Growth

In terms of opportunities for growth, over 65% of nonprofit SE respondents agree or strongly agree that they plan to increase their revenues through sales over the next two years. Other sources of revenue which nonprofit SEs identify as very likely for their revenue growth strategies are fundraising (37%), profits/surplus (34%), government grants (28%) and non-government grants (22%) strategies. Half of nonprofit respondents rated increasing their business revenue over the next two years as a very important as part of their enterprise's strategic plan.

65% of nonprofit SE respondents agree or strongly agree that they plan to increase their revenues through sales over the next two years.

Increasing individual customers is nonprofit SE's number one strategy for growth

Respondents across all nonprofit social enterprise subsectors identified business from individual customers as the most important source of growth; 63% of nonprofit SEs consider it to be very important. Other revenue growth strategies considered very important among nonprofit SEs are growing business from other businesses as part of a formal supply chain (14%) and securing public contracts (13%).



>> For a comparison of for-profit SE's growth plans, see the For-profit section further below

>> To learn more about the growth strategies for specific nonprofit subsectors, see the subsector summary sheets available online at www.ccednet-rcdec.ca/en/toolbox/2015_Ontario_SE_Report-Feature_sheets

4.5 Trends: 2012 and 2015 Compared

In order to facilitate an accurate comparison with the 2012 data, this section compares 2015 data from the nonprofit sector, excluding childcare and housing which were not part of the original 2012 survey.



>> For a detailed analysis of the 2012 data see *Inspiring Innovation: the Size, Scope and Socioeconomic Impact of Nonprofit Social Enterprise in Ontario*’ CCEDNet conducted in 2012.

How Have Ontario Social Enterprises Changed? - the Highlights

In looking at data about the target groups that SEs employ, train or serve, there were few substantial differences in the percentages between the two surveys. However there are a substantially higher proportion of respondents in 2015 that included families (41% vs 28%) and people with addictions (24% vs 13%). There is also an 8% increase in those who selected people with physical disabilities and seniors and a 7% decrease in those who selected ethnic minorities.

There are increases in the average numbers of people responding SEs employ (11 FTE vs 9 FTE), particularly in the average number of people they employed from their target

TOP FIVE CHALLENGES FACING NONPROFIT SOCIAL ENTERPRISES (in descending order)

2015 SURVEY	2012 SURVEY
Access to External Capital To Invest In SE ⁷ – 88%	Access to External Capital to Invest in SE – 80%
Internal Resources – 56%	Information Technology – 58%
Legal & Regulatory Considerations – 56%	Contract Procurement – 55%
Advertising / Publicity – 55%	Internal Expertise to Drive the SE – 54%
Internal Expertise to Drive the SE – 54%	Logistics for Production / Distribution – 52%

TOP FIVE RESOURCES IDENTIFIED BY NONPROFIT SOCIAL ENTERPRISES (in descending order)

2015 SURVEY	2012 SURVEY
Tools to Measure Social and / or Environmental Impact – 69%	Organizational & Capacity Building Strategies – 79%
Online Access to Manuals & How-To Guides – 69%	Tools for Enhancing Staff Capacity – 78%
Communications / Public Relations – 68%	Tools to Measure Social and / or Environmental Impact – 76%
Organizational & Capacity Building Strategies – 68%	Communications / Public Relations – 76%
Tools for Enhancing Staff Capacity – 66%	Networking Information – 75%

groups (27 vs 16). There is also an increase in the number of full and part-time volunteers engaged. There is, however a substantial decrease in the average number of people respondents reported training (140 vs 210) and an even great decrease in the average numbers served (5,500 vs 9,100).

Average annual revenue of responding SEs is higher in 2015 for both total revenue (\$1,006K vs \$856K) and for revenue from sales of goods and services (\$614K vs \$549K). In 2015 there is smaller percentage of respondents reporting that revenue exceeded expenses (75% vs 85%). For responding SEs

that transferred revenue to their parent, there is a dramatic increase in the average amount for 2015 (\$26K vs \$4K).



>> For a more detailed comparison of this year's survey with 2012 results, see Appendix B

Overall, nonprofit social enterprise respondents are less likely to perceive these resources as helpful in their development compared to 2012.

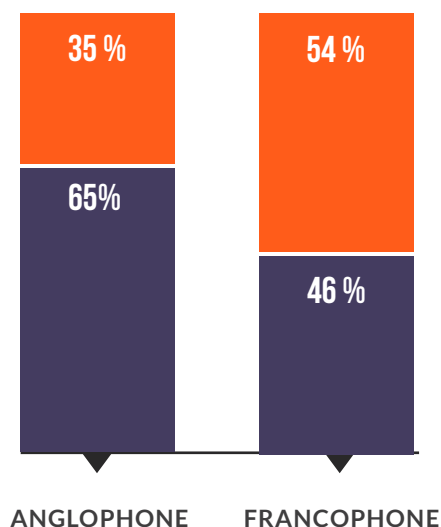
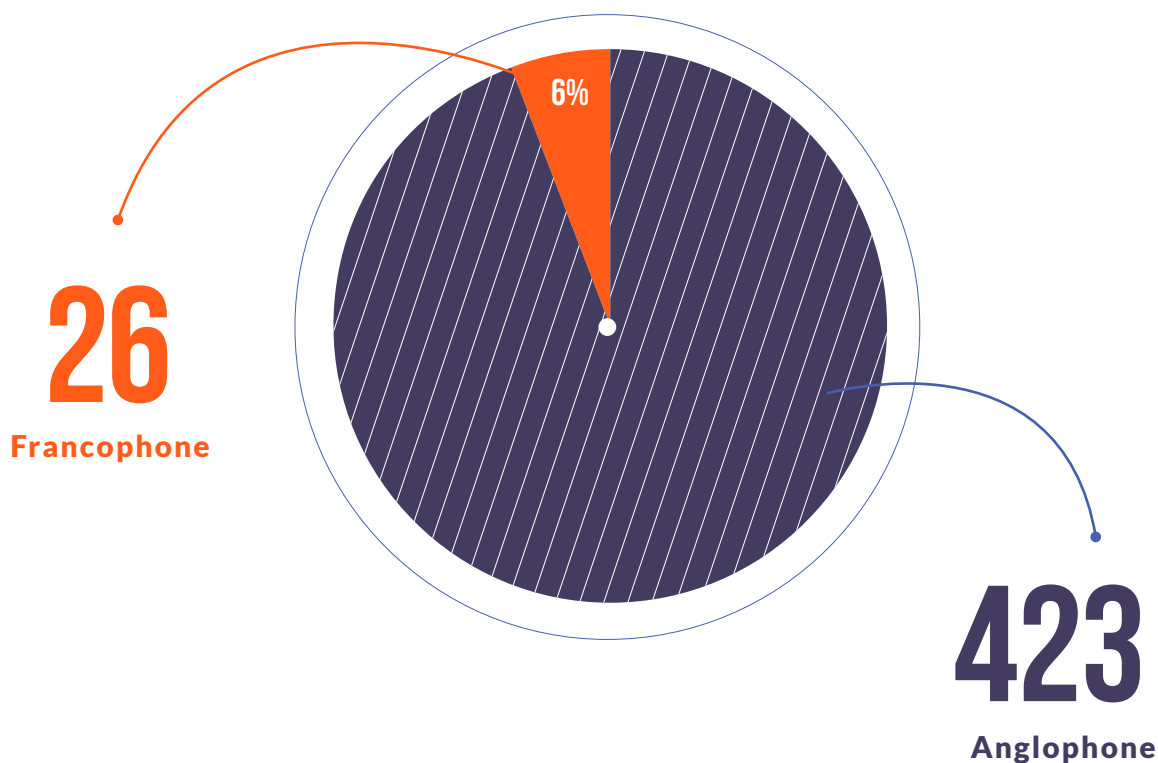


SECTION 5

Francophone Focus

Of the 449 respondents participating in the nonprofit survey, about 6% of these social enterprises are francophone organizations. The province has a francophone population that is 4.8% of the overall population⁸ so this sample size reflects this provincial reality with reasonable accuracy. Given the relatively small number of francophone respondents (n =26), the percentages for parts of the following analysis would not be considered statistically significant and should be considered indicators rather definitive. On the other hand it is also worth noting that the actual count of francophone SEs represented is 35 since some respondents provided data reflecting multiple enterprises.

PROPORTION OF FRANCOPHONE SEs (NONPROFIT SURVEY)



In general, there are more responding francophone social enterprises in rural communities than urban communities. Fifty-four percent (54%) of rural social enterprises are francophone which is somewhat higher than rural anglophone social enterprises (35%). This means that 46% of francophone social enterprises operate in urban communities, compared to 65% of anglophone social enterprises.

Thunder Bay

Sault Ste. Marie

REGION AND LANGUAGE

While francophone and anglophone social enterprises were fairly similar in how long they have been in operation, they differ widely in where they are distributed in Ontario. Francophone social enterprises are much more likely to be found in the East (48% vs 20% anglophone) and the North (36% vs 8% anglophone) regions of the province. None of the francophone organizations in our sample report being in South-West Ontario compared to 25% of anglophone social enterprises. The Central South region also has a low representation of francophone social enterprises (4% vs 18% anglophone).

Central North

4.0% FRANCOPHONE
8.0% ANGLOPHONE

South-West

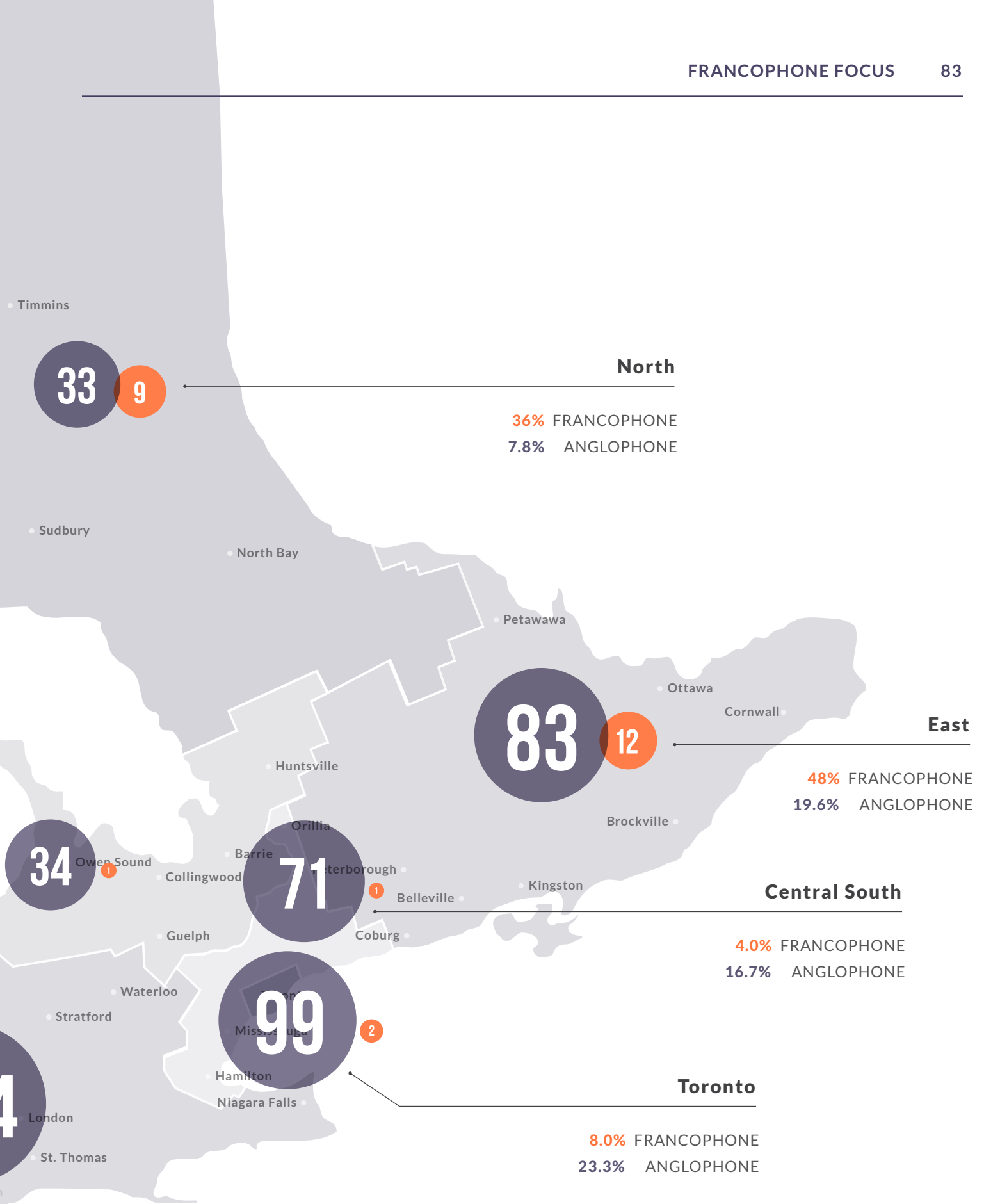
0% FRANCOPHONE
24.5% ANGLOPHONE

104

Sarnia

Chatham

Windsor



Responding francophone social enterprises are one third as likely to provide services to neighbourhood or local community compared to their anglophone counterparts (19% vs 61%). On the other hand, 62% of francophone social enterprises report working with women compared to 38% of anglophone social enterprises. Francophone social enterprises are also somewhat more likely to work with youth (by 17%), ethnic minority groups (by 16%), low income individuals (by 15%), people with employment barriers children and family (by 14%).

62% of francophone social enterprises report working with women compared to 38% of anglophone social enterprises

When looking at the diverse subsectors that make up Ontario's social enterprise landscape, francophone organizations are almost three times more likely to be working within the arts and culture sector compared to anglophone social enterprises. Half of francophone respondents work with arts culture and communications. When considering their mission, francophone social enterprises are also more likely to identify as having a cultural mission compared to their anglophone counterparts (54% vs 37%). Anglophone and francophone social enterprises are equally as likely to work within the employment subsector. However they are about one quarter as likely to be in the thrift subsector compared to anglophone social enterprises. None of the francophone respondents are a farmers' market. Francophone enterprises are about half as likely to have an environmental mission as their anglophone counterparts.

The sample size of francophone social enterprises that provided complete financial and employment information is quite small, consequently these results should be taken with caution. In 2014, francophone and anglophone social enterprises employed a similar average number of full-time and part-time employees, including freelancers and contract workers. However, anglophone social enterprises employed almost twice as many full-time equivalent (FTE) employees on average as francophone social enterprises. This corresponds to the averages for total wages for francophone social enterprises which was also approximately half of the average amount paid by anglophone social enterprises (about \$200K vs \$425K).

Francophone social enterprises respondents engaged approximately one third as many volunteers on average as their anglophone counterparts.

In 2014, francophone responding social enterprises earned an average revenue from sales that was one third of the average for anglo-

Half of francophone respondents work with arts culture and communications

phones (\$226K vs \$669K). Average revenue from all sources (including sales, grants, loans, etc.), was about half that of anglophone social enterprises (\$400K vs \$989K). In looking at percentage of average revenue from grants, francophone social enterprises receive about 75% of their total revenues from grants while anglophone social enterprises receive only 33%. Much of this difference relates to grants from parent organizations. Although 14%

fewer francophone respondents have a parent organization, those that do benefit greatly. On average, francophone social enterprises receive three times as much in grants from their parent organizations compared to their anglophone counterparts (\$109K vs \$37K).

In 2014, 87% of francophone social enterprises report breaking even compared to 76% of anglophone social enterprises. This number drops to 43% when grants are excluded, compared with just over half of anglophone organizations (57 %) breaking even without grants.

Compared to anglophone social enterprises, responding francophone social enterprises are about twice as likely to receive grants from the federal and provincial governments, 20% more likely to receive grants from a credit union/ caisse populaire and 10% more likely to receive grants from banks. Francophone social enterprises are also four times more likely to receive loans from a parent organization or a Community Futures Development Corporation. While anglophone and francophone organizations don't differ in how they use grant funding, francophone social enterprises are four times less likely to use loans for capital projects and 22% more likely to use loans for governance purposes.

Francophone social enterprises receive three times as much in grants from their parent organizations compared to their anglophone counterparts

When considering strategies for revenue growth, responding francophone and anglophone social enterprises are similar in their likelihood of planning to increase revenues through sales, through securing non-gov-

ernment grants/contributions, and through traditional fundraising. However, francophone social enterprises are almost twice as likely to report securing business from public contracts as very important for their revenue growth plan. Almost twice as many francophone organizations identify securing government grants/contributions as a very important strategy in their growth plan. Francophone social enterprises are also over five times as likely to consider repayable equity as strategies for revenue growth compared to anglophone enterprises (15% vs 3%). Business from individuals is slightly more important in the revenue growth plans of anglophone social enterprises.

Francophone social enterprises are almost twice as likely to report securing business from public contracts as very important for their revenue growth plan

In general, there are no significant differences between francophone and anglophone social enterprises in their ratings for major challenges or in which resources they see as most helpful for their development. Francophone and anglophone social enterprises differed slightly for the following challenges:

- ▶ **Human resources**
(55% francophone, 41% anglophone);
- ▶ **Internal resources**
(33% francophone, 46% anglophone);
- ▶ **Advertising / publicity**
(53% francophone, 43% anglophone).

GREATEST CHALLENGES FACING FRANCOPHONE SEs	MOST HELPFUL RESOURCES FOR FRANCOPHONE SEs
Access to Grant Capital – 60%	Tools to Enhance Staff Capacity – 76%
Cash Flow – 60%	Online / Live Webinars – 74%
Business Planning – 55%	Social Media Training – 71%
Human Resources – 55%	Organizational Growth & Capacity Building – 70%
Internal Expertise to Drive the SE; Advertising / Publicity (tied) – 53%	Financial Planning Support & Training – 70%

SECTION 6

Poverty Focus

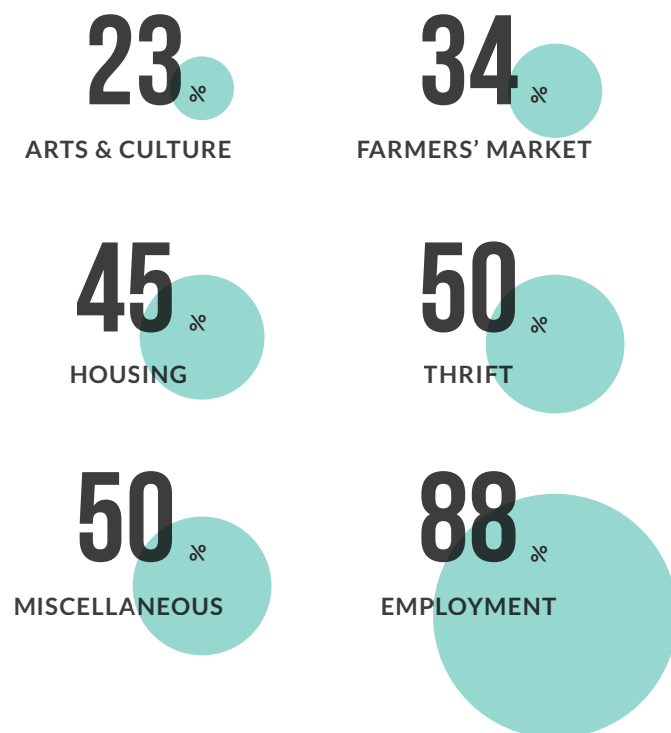
The link between social enterprise and poverty reduction has been well recognized in Ontario and reference to social enterprise has been included in the province's poverty reduction strategies. This survey data helps to make that link explicit. A set of criteria has been applied to estimate the proportion of respondents which support poverty reduction work through working with people with low incomes. In the social enterprise survey work across the

Nearly half (45%), or 203, of responding nonprofit social enterprises meet the poverty-focused conditions.

country, poverty-focused social enterprises are defined as those that identify with an employment purpose and/or target people with low incomes, homeless people or people with employment barriers. For increased accuracy, respondents that selected more than twelve target populations have been filtered out, assuming that they may have misunderstood the intent of the question to select only those groups that specifically relate to the organizational mission. It is understood that these criteria for poverty-focus are somewhat limiting and may under-represent the full range of poverty reduction work occurring through social enterprises.

Nearly half (45%), or 203, of responding nonprofit social enterprises meet the poverty-focused conditions.

POVERTY FOCUS SEs BY SUBSECTOR



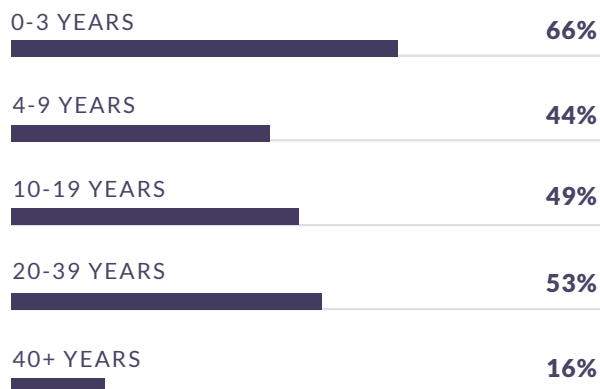
The high level of poverty focus in the employment subsector is expected due to the emphasis on people with persistent barriers to employment in the focus criteria. Half of respondents in the thrift and miscellaneous subsectors are considered poverty focused, along with nearly half of those in the housing sector. The farmers' market and arts and culture respondents are less likely than others to be poverty focused.

Poverty focus is most common among the youngest social enterprises and least common among the oldest. More than three-fifths of those younger than four years meet the poverty criteria. The proportion of poverty-focused respondents among the middle age

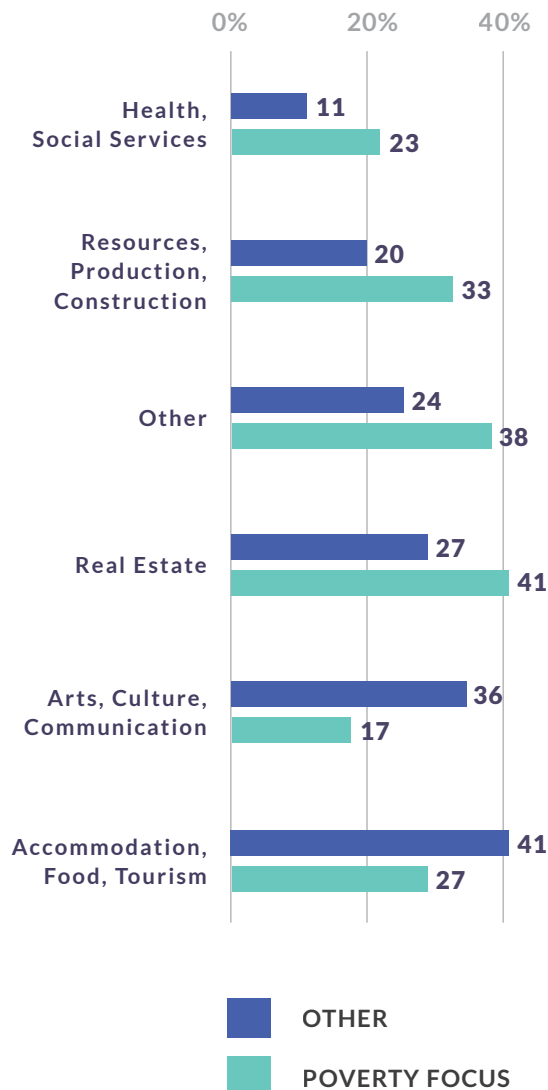
groups is not much smaller than those of the youngest; it is the oldest group that stands out, with less than a fifth of those respondents considered poverty-focused. This makes sense when considering that poverty and inequality became more visible as a result of economic restructuring in the 1980s (Conference Board of Canada).

Interestingly, only the social enterprises with a cultural, employment or training purposes have statistically significant relationships with poverty focus. Just over a quarter of respondents identifying with cultural purpose are poverty-focused, while about four-fifths of respondents that identify with employment and training purposes are poverty-focused. Poverty-focused social enterprises are much more likely to work with disability related groups and slightly more likely to work with women. They are 19% less likely to work with all people in a given area and are slightly less likely to target children, ethnic groups, people with addictions and refugees.

POVERTY FOCUS SEs BY AGE



POVERTY FOCUS SEs BY INDUSTRIAL SECTOR



Poverty-focused respondents were similar to overall nonprofit survey respondents in respect to legal structure, charitable status, region or urban/rural status.

Financials

Compared to their non-poverty-focused counterparts, respondents with a poverty focus are less likely to receive grants from all three levels of Canadian government. They are

Poverty focused SEs are less likely to receive grants from all three levels of government.

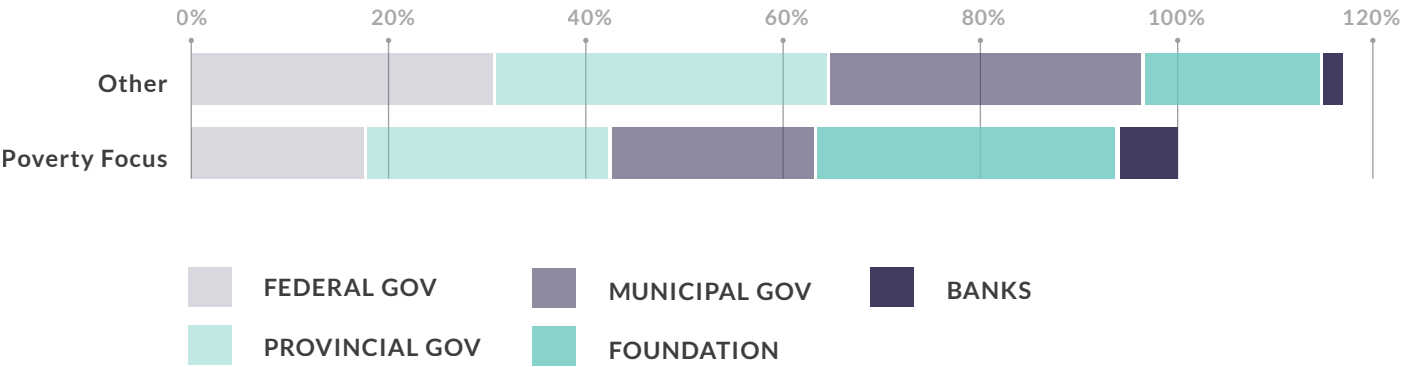
more likely to receive grants from foundations and banks. It is however possible that they are generating revenue through contracts with government.

In regards to the purposes that grants are used for, poverty-focused respondents are more likely to invest grants in capital and technical assistance, while non-poverty-focused respondents are more likely to use grants for governance purposes.

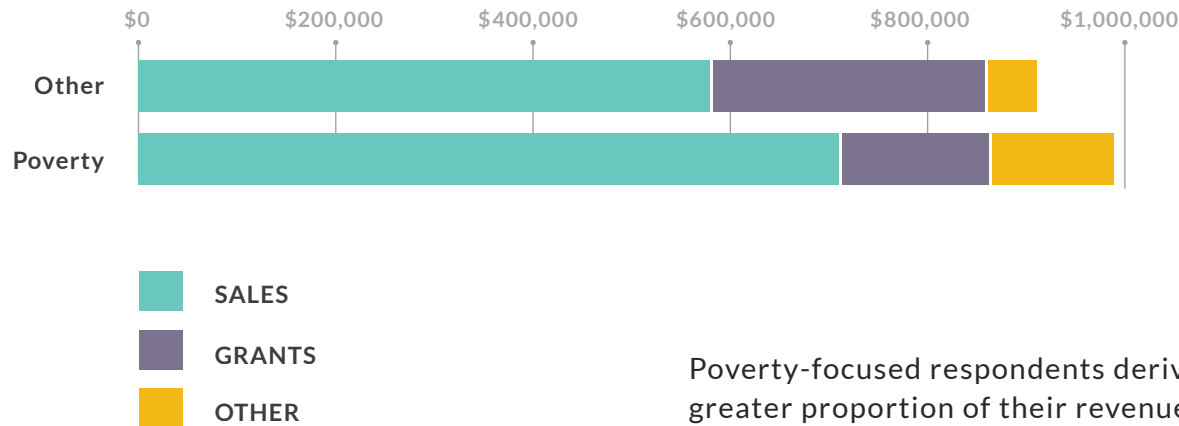
Overall, the number of nonprofit social enterprise respondents acquiring loans is not high. However, the data shows that poverty-focused respondents are more likely to receive loans from municipalities (3.5% vs. 0.4%) and private individuals compared to other nonprofit social enterprises (4.0% vs. 0.9%).

Poverty-focused respondents are twice as likely to offer products and services in the health and social service industry and are also more likely to offer products and services in resources/production/construction, real estate and 'other' industries. Non-poverty-focused respondents are twice as likely to offer products and services in the arts/culture/communication industries and also more likely to work in the accommodation/food/tourism industries.

POVERTY FOCUS SEs BY SOURCE OF GRANTS



POVERTY FOCUS SEs WITH TOTAL REVENUE BY TYPE



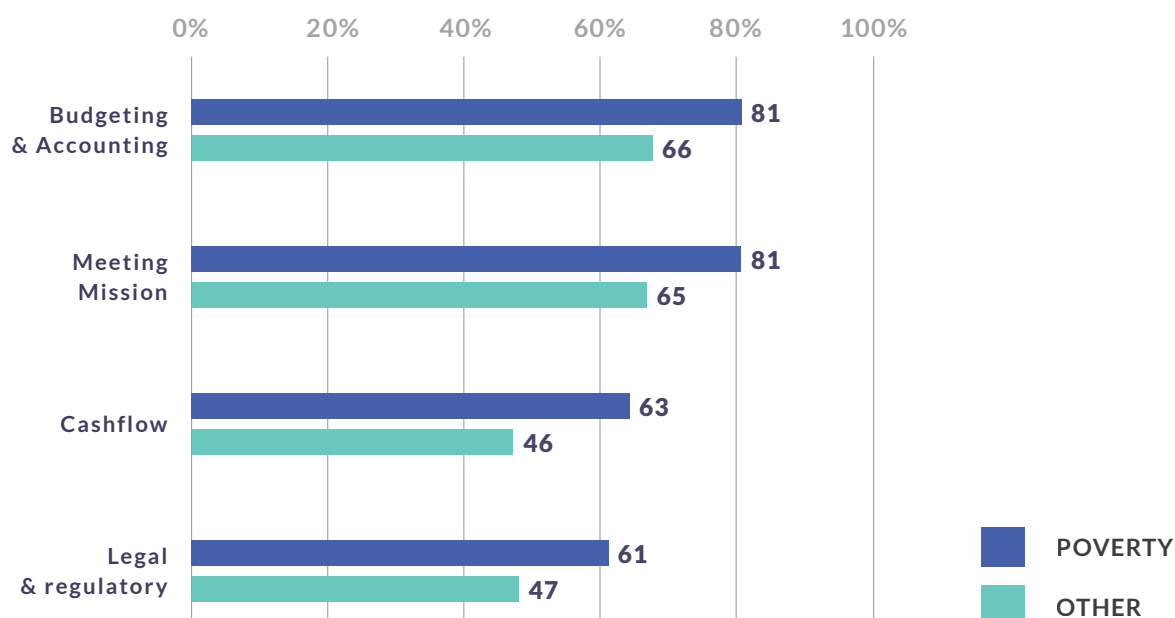
Poverty-focused respondents derive a greater proportion of their revenue from sales (13% more on average). Respondents that do not have a poverty focus receive 14% more revenue from grants compared to poverty-focused ones. Although the total revenue is somewhat higher for poverty focused respondents, their expenses are higher as well, resulting in slightly less net profit compared to others.

Poverty-focused respondents derive a greater proportion of their revenue from sales

Respondents that are poverty-focused are most likely to view budgeting and accounting and meeting their organizational mission as moderate or significant challenges (both 81%). Other highly rated challenges are cash flow (63%) and legal and regulatory issues (61%). Poverty focused were 14% -17% more likely than other SEs to rate these challenges highly.

Responding poverty-focussed SEs are 10% more likely than other SEs to rate business growth as part of there strategic plan for the next two years to be moderately or very important . In terms of specific strategies, their ratings are also higher for all strategies. This is particularly true of business from other business in the formal supply chain (18% higher) and busiess form public contracts (16% higher). They are most similar to other SEs in rating business from individual customers (8.0% higher).

POVERTY FOCUS SEs BY TOP CHALLENGES



SECTION 7

Disability Focus

The value of social enterprise as an effective and appropriate vehicle for the training and employment of people with disabilities is well-established and this is reflected by the many recognized social enterprises working with specific disability populations, particularly those with psychological disabilities and intellectual disabilities. CCEDNet's research paper [*"Social Enterprises and the Ontario Disability Support Program: A Policy Perspective on Employing Persons with Disabilities"*](#), written by Dr. Gayle Broad in 2008, documented several successful SE models and outlined the policy challenges these enterprises face.

This section of the report provides a current profile of social enterprises with a disability focus. In selecting the demographic groups that they train, employ or provide services to, 20% (88) of nonprofit survey respondents specifically selected people living with physical, psychiatric or intellectual disabilities⁹.

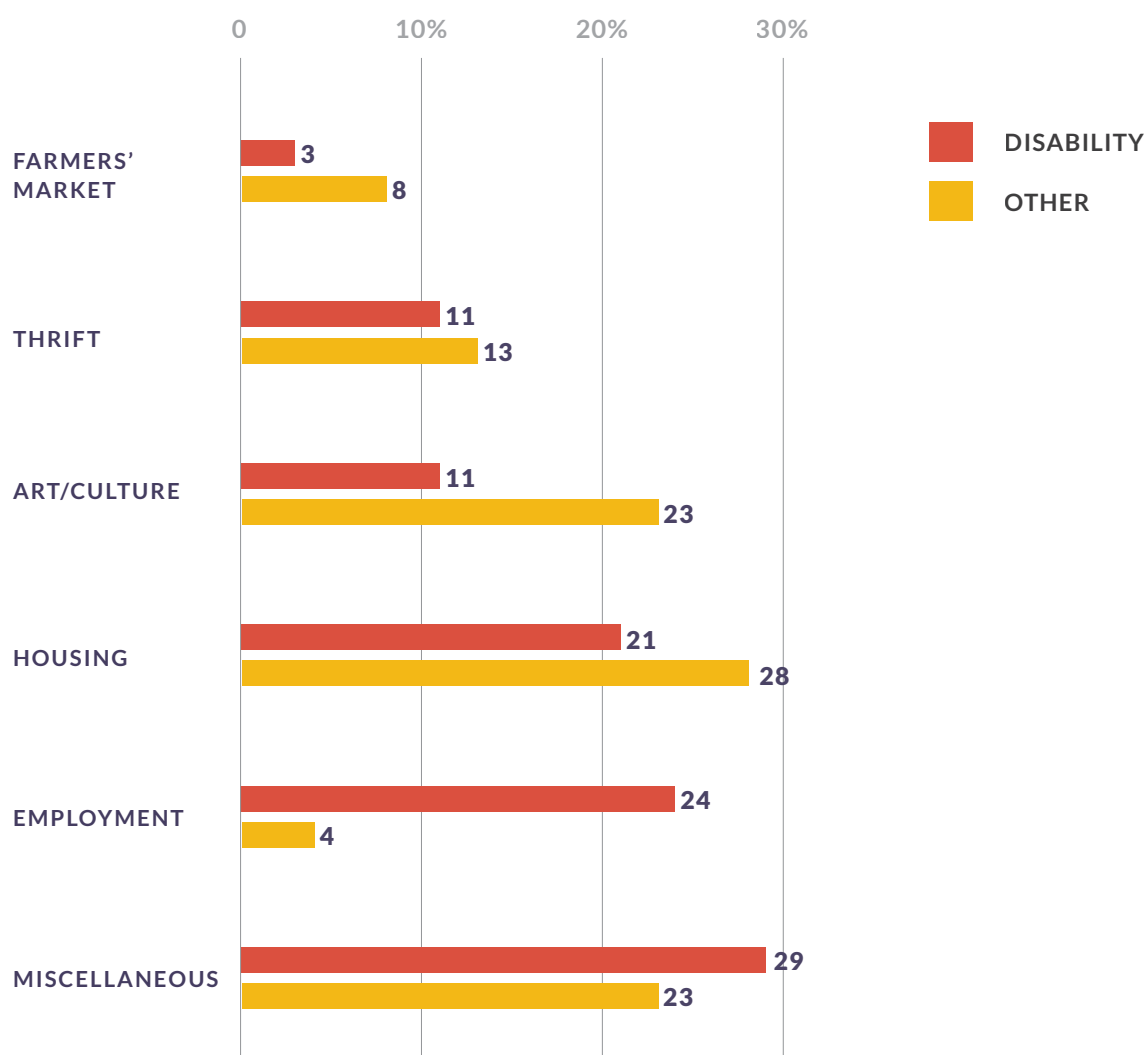
The following analysis compares responses by nonprofit SEs that selected one or more disability-related demographic groups with those that did not select them.

Responding social enterprises working with disability groups are six times more likely to identify with the employment subsector and somewhat more likely to be in the miscellaneous subsector. They are less likely to be in any other subsector.

There are no significant differences in whether SEs in certain regions or in urban or rural communities include people with disabilities in their work.

Disability-related SEs are three times more likely to be poverty-focused

DISABILITY FOCUS SEs BY SUBSECTOR



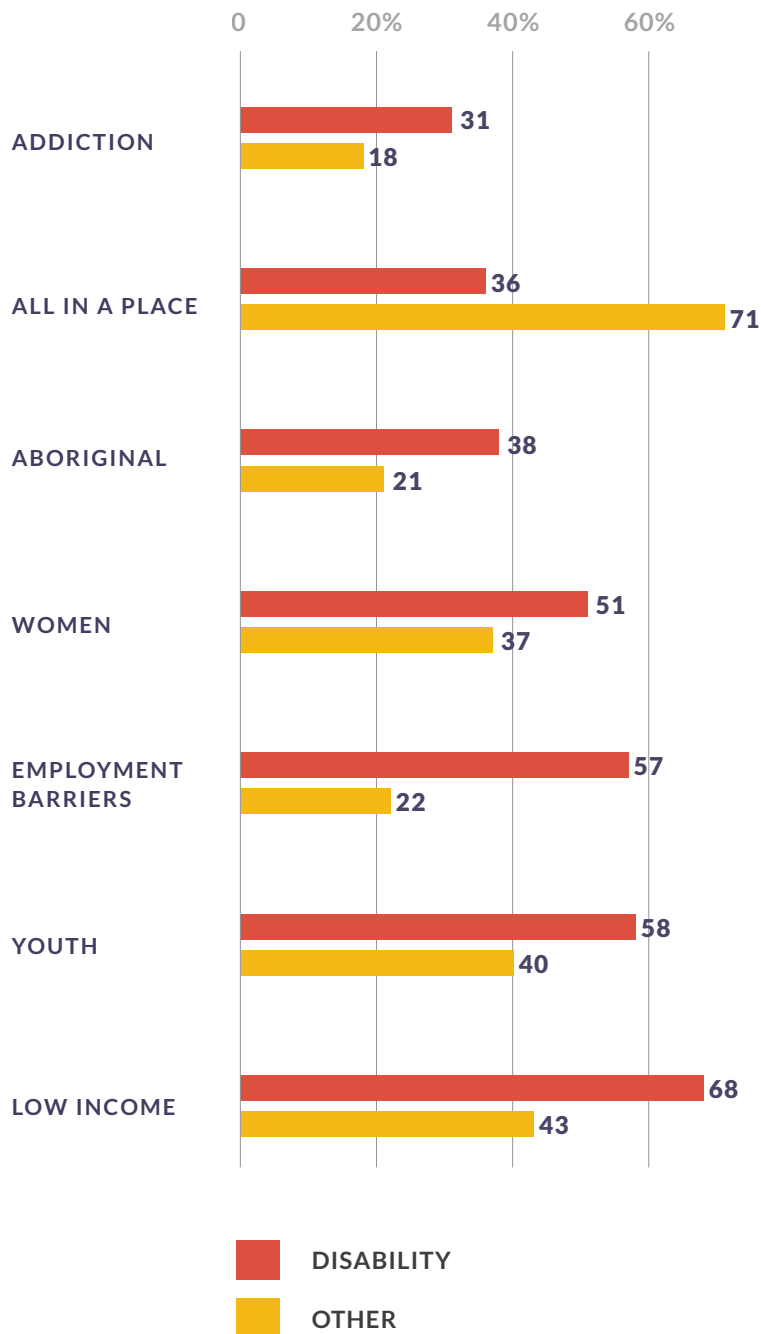
When compared with SEs that do not specifically include people with disabilities, disability-related SE respondents are about three times more likely to include employment (57% vs 16%) or training (38% vs 12%) in their purpose. Percentages for all other purposes are more similar to the overall nonprofit social enterprise sector.

Using the definition of poverty-focus described in this report, disability-related SEs are three times more likely to be poverty-focused (92% vs 33% non-disability).

The percentages of disability-related SEs using each type of legal structure is similar to the nonprofit social enterprise sector as a whole.

In terms of their scale of operation, disability-related SEs are 20% less likely to serve a neighbourhood and 10% less likely to have a national focus. However, they are 15% more likely to operate at a city-wide level. They are also twice as likely as other SEs to work with multiple populations.

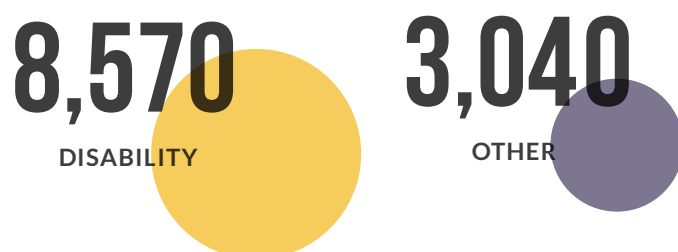
DISABILITY FOCUS SEs BY TARGET GROUP



In addition to training, employing and serving people with disabilities, disability-related SEs are more likely to target people with employment barriers, lower income individuals, youth, Aboriginals and women. They are less likely to target all people in a specific area.

Age of social enterprise is not a significant factor in whether an SE focuses on people with disabilities as part of their work.

DISABILITY FOCUS SEs BY AVERAGE NUMBER OF PEOPLE SERVED



Finances and Employment

Disability-related responding SEs on average serve almost three times as many people as other SEs (8.3K vs 2.7K). Their average number of employees is also substantially higher than other SEs. (43 vs 20)

Their average FTE employment is 2.5 times that of other SEs (19 vs 7) and their average total wage expenditures are correspondingly larger. (\$772K vs \$316K)

In term of training and engaging volunteers their average numbers are just a little lower than those of the nonprofit SE sector as a whole (10 less trained and 5 less volunteers)

On average, disability-related SEs generate almost twice as much in annual sales revenue as their non-disability-related counterparts (\$996K vs \$553K). Respondents are generally larger operations with revenue from all sources being almost twice that of non-disability-related SEs (\$1.4 mill vs \$0.8 mill).

Sources of grant funding for disability-focused SEs are generally similar to those not specifically working with disability groups. The one exception is that responding disability-focused SEs are over four times as likely to receive funding from a parent organiza-

tion (12% vs 3%). The purposes of grants are also similar to the SE sector as a whole. The exception here is their being almost twice as likely to access grants for technical assistance (53% vs 32%) and about 1.5 times as likely to access grants for capital projects (41% vs 29%). In terms of loan funding, disability-related SEs are similar to the overall sector.

Percentages of SEs that break even, either with or without grants, are similar for disability-related SEs as for others SEs. However, their average net profit is a little higher (\$13K vs 11K) and their net profit (or loss) without grants is similar, although a little lower (-\$201K vs - \$210K).

DISABILITY FOCUS SEs BY AVERAGE FTE EMPLOYMENT



DISABILITY FOCUS SEs BY TOTAL REVENUE



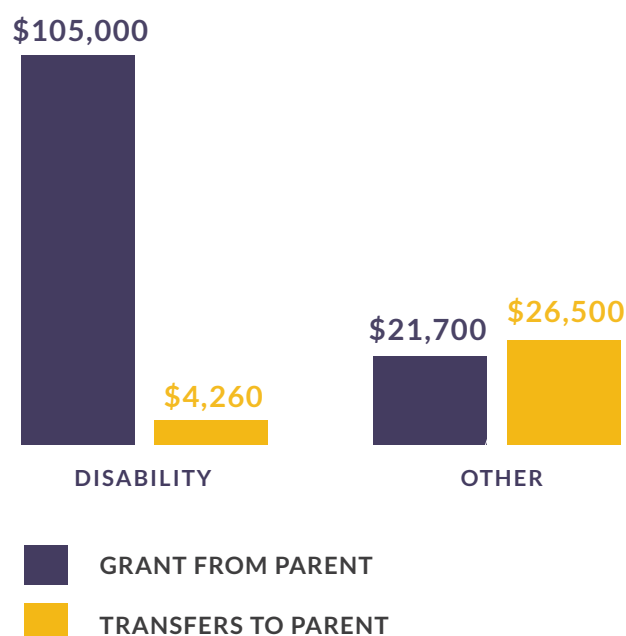
Disability-related SEs are 12% more likely on average than other SEs to have a parent organization. Looking at that relationship, the percentages of respondents that are in-house are similar but they are almost twice as likely to be independent or to be separate but close. In describing the kinds of supports they receive from their parent organizations, disability-related SEs are similar to other SEs except that they are almost twice as likely to have space provided by their parent.

In looking at financial interaction between SEs and their parent organizations, disability-related SEs, on average, receive more than four times as much in grants from their parent organizations compared to other SEs. (\$105K vs \$22K). On average, disability-related SEs transfer about one sixth as much to their parent organizations. (\$4K vs \$26K)

Disability-focused SEs, on average, receive over four times as much funding from a parent organization.

In looking at the products and services produced or provided by disability-related SEs, respondents reflect the overall SE sector in most areas. They are however three times as likely to operate in the Health sector (9% vs 3%) and twice as likely to be in philanthropy (20% vs 10%). They are one third less likely to work in education research (3% vs 11%).

DISABILITY FOCUS SEs & PARENT FINANCIALS



The interest in tools for measuring social impact is substantially higher for disability-related SEs than for others.

Challenges

Challenges for disability-related SEs reflect the overall SE sector in several aspects in that access to grant capital is rated highest and internal expertise to drive the SE and advertising/publicity are high priorities. However, there are several areas where these respondents differ. Brand recognition and awareness, access to customers and contract procurement are rated as considerably higher challenges by disability-related SEs. On the

other hand, budgeting, cash flow, legal considerations and board of director involvement are rated as substantially lower challenges, on average, for this group.

Educational Resources

The top four educational resources rated as helpful by disability-related respondents are the same as for the overall SE sector:

- ▶ Online access to manuals and guides
- ▶ Tools for staff capacity building
- ▶ Tools for measuring social impact
- ▶ Communications/public relations support.

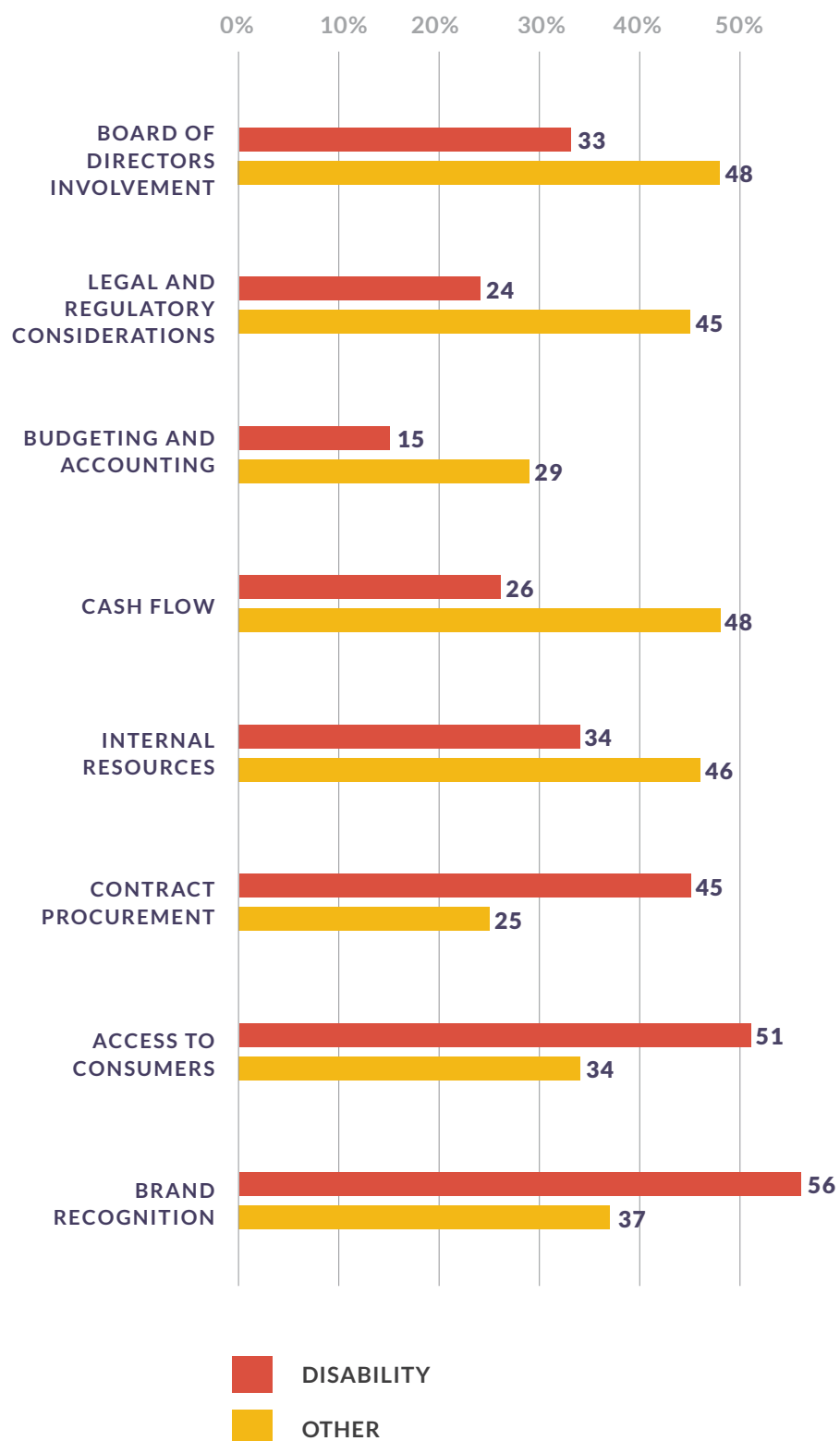
However, the interest in tools for measuring social impact is substantially higher for disability-related SEs than for others (67% vs 54%). Interest in capital and social purpose investment opportunities, offline workshops and coaching are all similarly rated higher by disability-related SEs.

Looking at average ratings for all educational resources, disability-related SEs rate these resources as 7% more helpful on average, compared to other SEs.

Strategies for Growth

Disability-related SE respondents are, on average, 5% more likely than other SEs to be planning to grow their businesses through increased sales. Other anticipated sources of revenue are similar to those for the overall sector although they are 10% more likely to anticipate using fundraising and 8% more likely to anticipate raising funds through non-government grants and contributions.

DISABILITY FOCUS SEs BY CHALLENGES THAT DIFFER FROM OTHER SEs



Disability-related SEs are 8% more likely to see business growth as an important part of their strategic planning for the next two years. In fact they are 22% more likely to see this as “very important”.

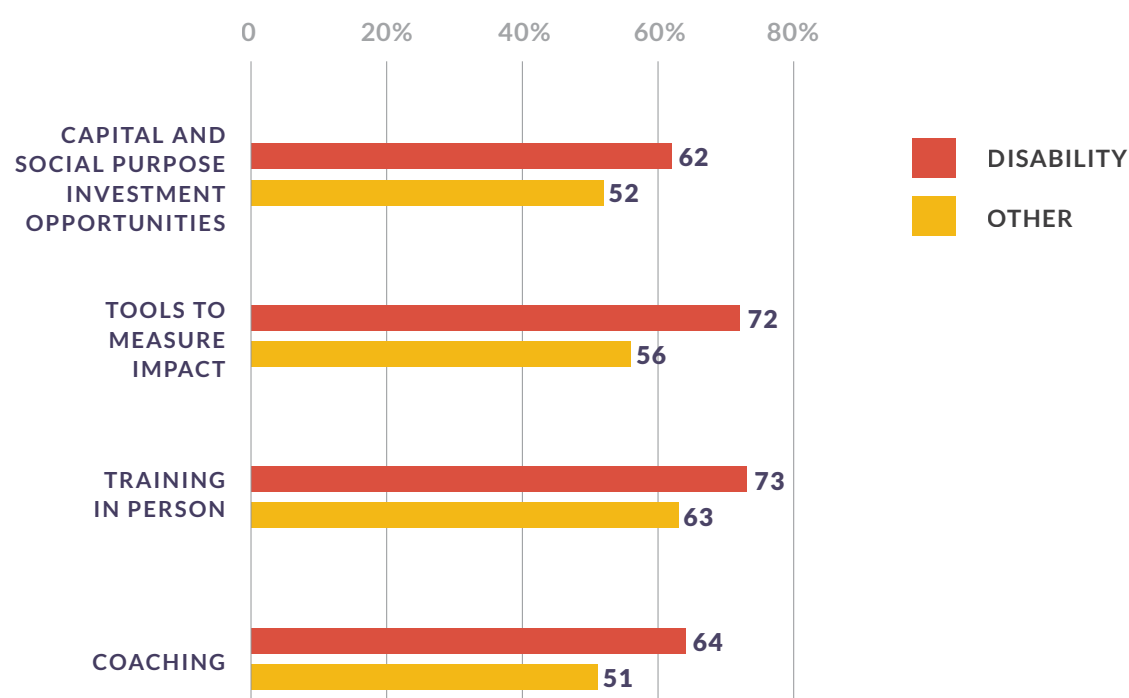
It is clear that disability-related SEs are much more likely than other SEs to be considering all of the named strategies for business growth. On average, disability-related SEs are 21% more likely than non-disability-re-

Disability-related SEs consider challenges directly connected to growth as high priorities and they are clearly focused on multiple growth strategies.

lated SEs to be planning business to business contracts with for-profit or nonprofits as part of their formal supply chain. They are 17% more likely to focus on growth through individual customers, 15% more likely through personal individual contacts within businesses and 12% more likely to be planning to build public sector sales through government or institution RFPs.

The 20% of social enterprises that train, employ or provide services to people living with physical, psychiatric or intellectual disabilities are a significant subset of the overall sector. With twice the average annual sales revenues of other SEs, they are well able to operate successful businesses while providing important social value. Disability-related SEs consider challenges directly connected to growth as high priorities and they are clearly focused on multiple growth strategies.

DISABILITY FOCUS SEs BY EDUCATIONAL RESOURCES THAT DIFFER FROM OTHER SEs



SECTION 8

For-profit Social Enterprise Sector

This section will review the findings of the for-profit social enterprise survey conducted by the Mars Centre for Impact Investing. The survey questions, format and type were similar to the nonprofit survey and were designed for easy comparison between the two groups. The survey also aimed to identify the capital needs of social enterprises and barriers in accessing capital. In total, 108 for-profit social enterprises completed this survey. The results reported here include responses for the 75 of these that were confirmed for-profit social enterprises¹¹.

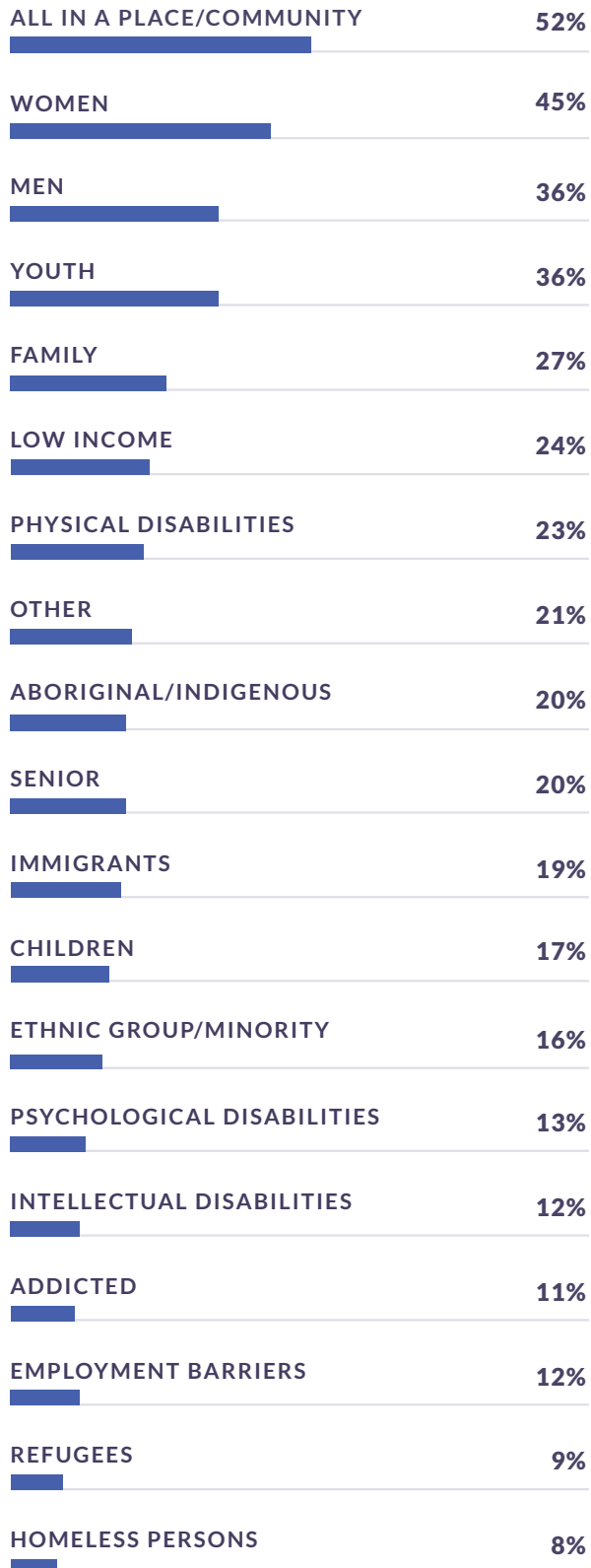
For a more in-depth picture of Ontario's for-profit social enterprise sector, see the [2014 For-profit Social Enterprise Survey for Ontario Results](#).

Unless otherwise noted, nonprofit comparisons do not include nonprofit child care organizations due to sampling differences.

Purpose/Mission

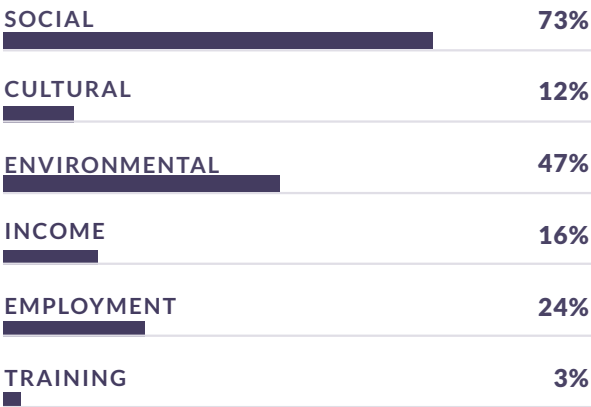
Respondents were asked to select their social enterprise purpose from a list of options and were not restricted to one answer. The majority of the respondents in both for-profit and nonprofit groups identified as having a social purpose; with nonprofits being slightly higher than for-profits. Almost half of the for-profit social enterprises reported environmental mission as their purpose. This could be attributed to the sample frame, as the majority of for-profit social enterprises surveyed fall under environmental or social purpose businesses.

FOR-PROFIT SEs BY TARGET GROUP

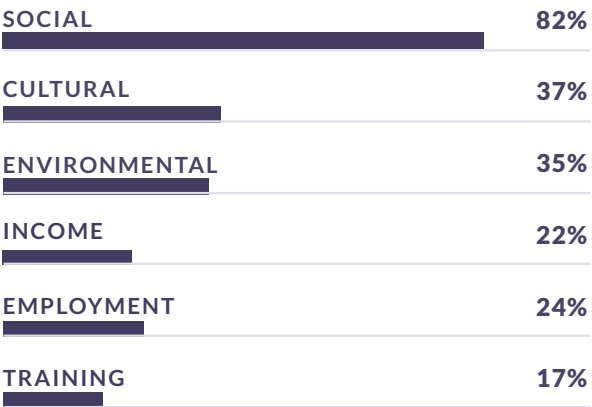


FOR-PROFIT & NONPROFIT BY PURPOSE

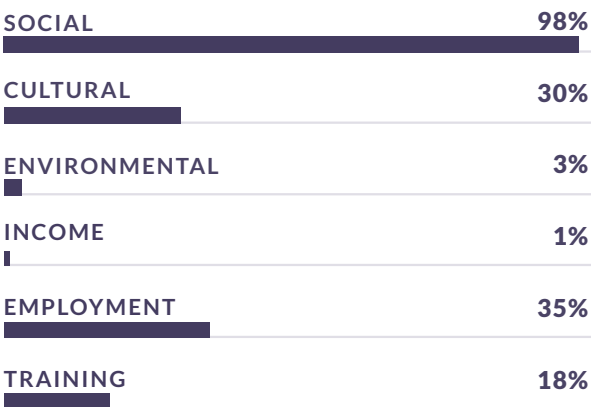
For-profit



Nonprofit



Childcare



Age of Social Enterprise

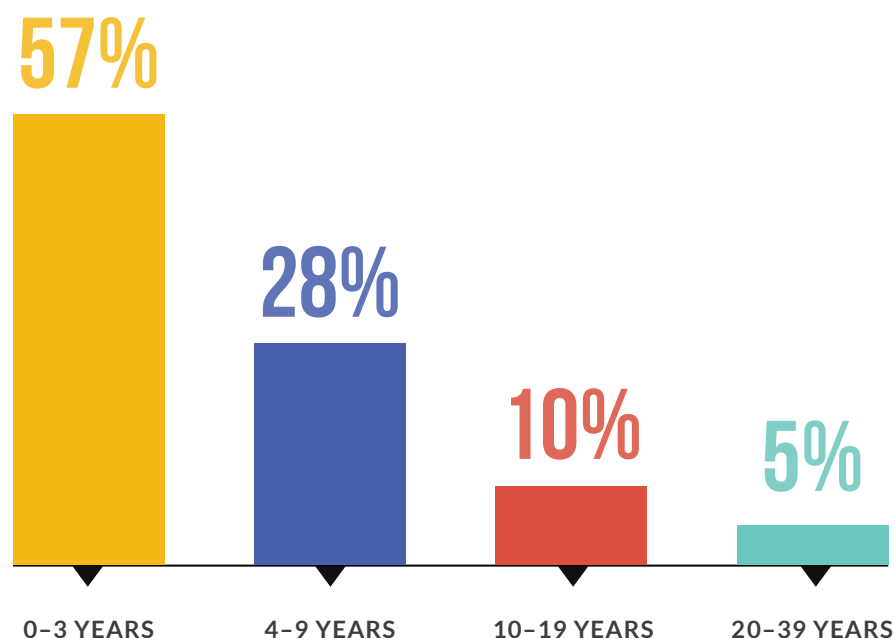
The majority of for-profit social enterprise respondents are relatively new companies, operating less than three years, indicating that this survey is likely representative of newly established enterprises. Over a quarter of respondents have been operating for 4-9 years and a little over one fifth have been operation for over 10 years. This high number of newer SEs likely reflects the methodology used to create the sample frame.

Respondents were asked to identify their legal structure from a broad list of options. Since this survey was targeted to all for-profit social enterprises, all respondents identified their legal structure as for-profit. Additionally, about 19% of them had also indicated “other”. Some examples of the other structure listed by respondents include original IP, B Corporation, limited liability partnership and Canadian Controlled Private Corporation (CCP).

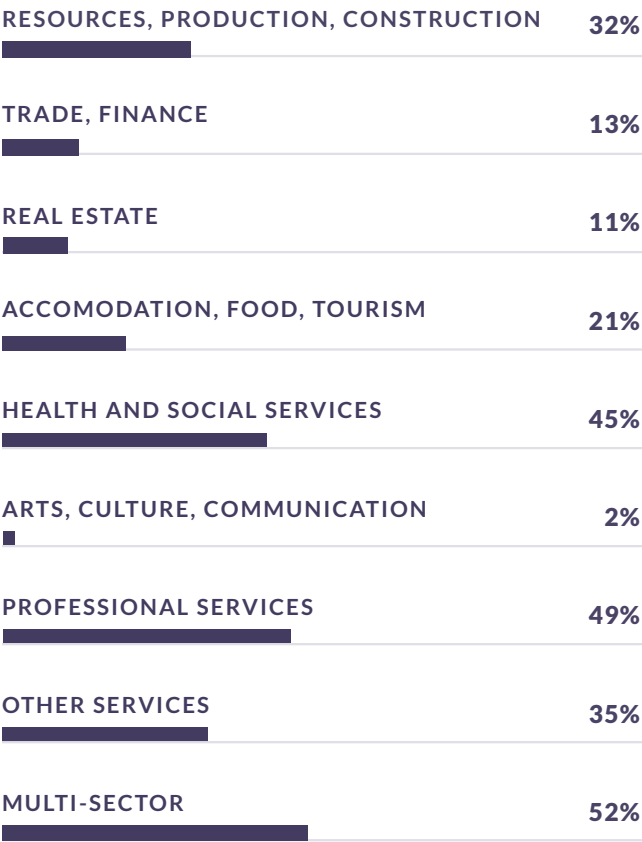
Targeted Groups

For-profit SEs provide services to a variety of populations. The majority of the respondents (52%) indicate that they provided services to individuals living in a particular place/community. Almost half of the respondents say they work with women (45%). Other common responses include men (36%), youth (36%), family (27%), homeless persons, low income (24%), individuals with physical disabilities (23%), Aboriginal/indigenous people (20%), and seniors (20%). Other target groups not listed include farmers, other businesses, engineers and composite technicians, nonprofits, schools, and grantmaking organizations.

FOR-PROFIT SEs BY AGE



FOR-PROFIT BY PRODUCT OR SERVICE SECTOR



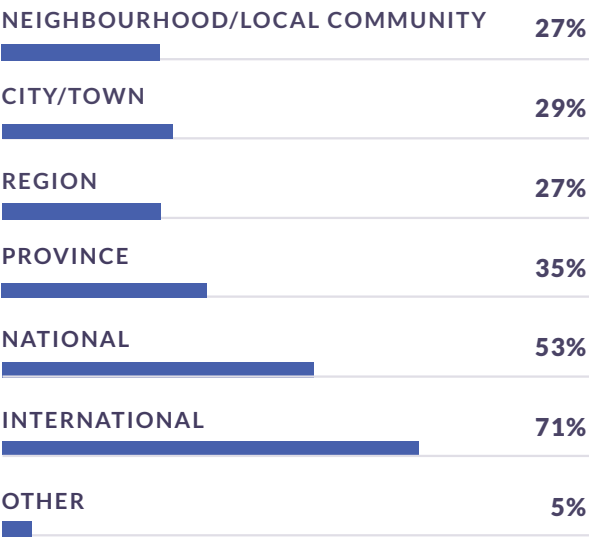
For-profit social enterprises are active in diverse sectors ranging from trade, finance to health and social services. More than half (52%) of respondents identified as multi-sector. Almost half indicated professional services (49.3%) and health and social services (45%). Examples of the “other” category listed by respondents include energy, event marketing, consumer products, health prevention and telecommunications.

Geographic Focus

As with the nonprofit survey, respondents were asked to indicate their geographic scope or areas of operation or from a list of six options. The majority of for-profit respondents reported their scope as international, over half indicated national. Almost one third listed province and over a quarter reported city or town, neighborhood or local community, and region.

Two-thirds of for-profit SEs respondents operate in the Toronto region, compared to one fifth of nonprofit respondents. This is most likely due to the sampling method for the for-profit survey. They were almost as likely to operate in Central South and much less much less likely to operate in every other region.

For similar reasons, for-profit SEs in our sample are much less likely than nonprofits to operate in rural regions with populations of less than 100,000 (12% vs 38%).



Employment, Volunteers and Financials

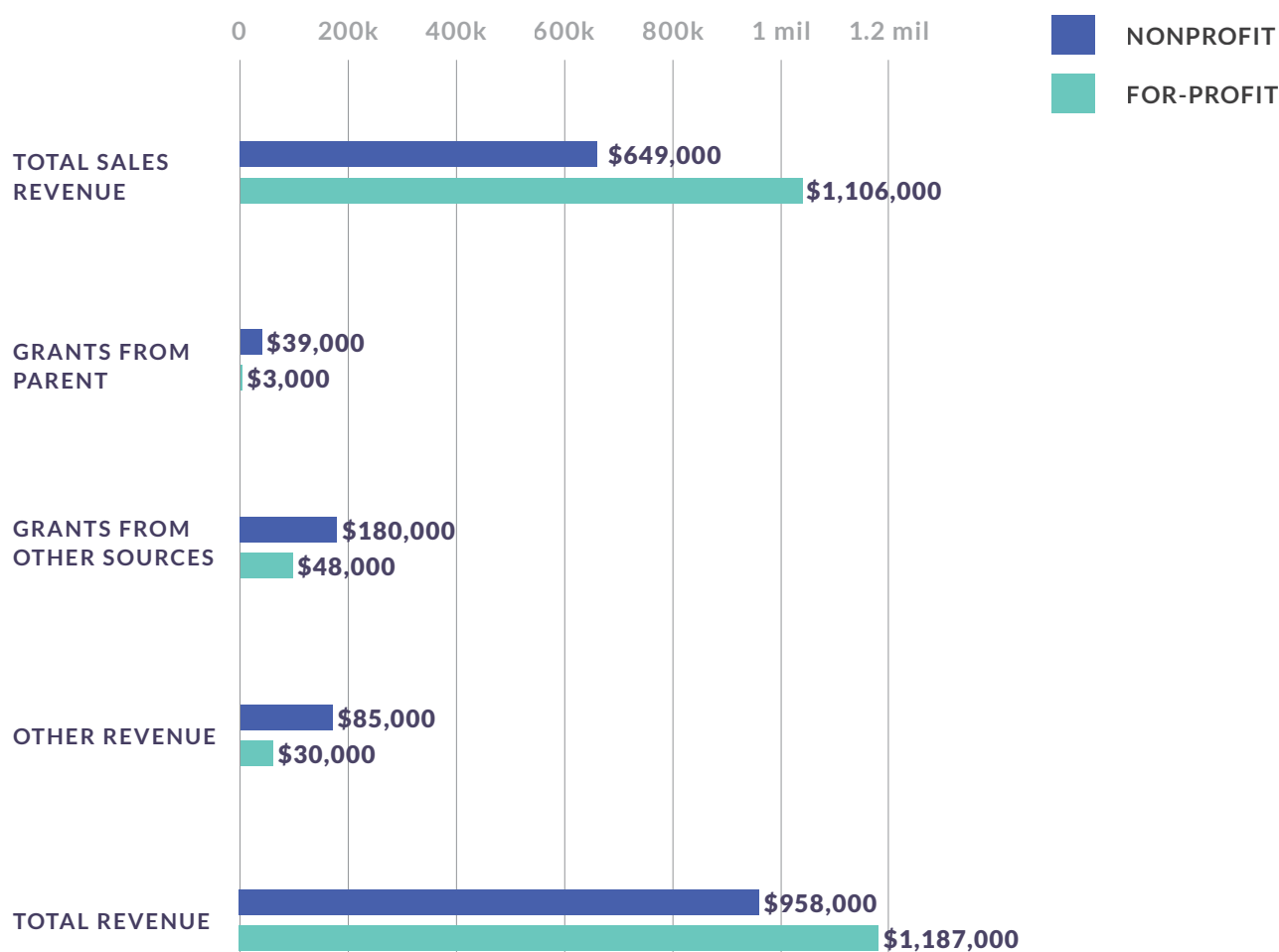
Nonprofits in this section do not include childcare. Of the 75 confirmed for-profit social enterprises, 44 provided complete employment and financial information and their responses are reported here.

When compared to nonprofit SEs, for-profits employ slightly more full-time staff on average. However, they rely less on part-time employees, casual workers (including seasonal employees and contractors) and volunteers compared to nonprofit SEs.

In 2014, for-profit social enterprises earned 1.2 times more in total revenues on average compared to nonprofit SEs. On average, almost all of the total revenue for the for-profit sector is derived from sales of goods and services (93%), including services contracts with government, compared to 68% for nonprofits.

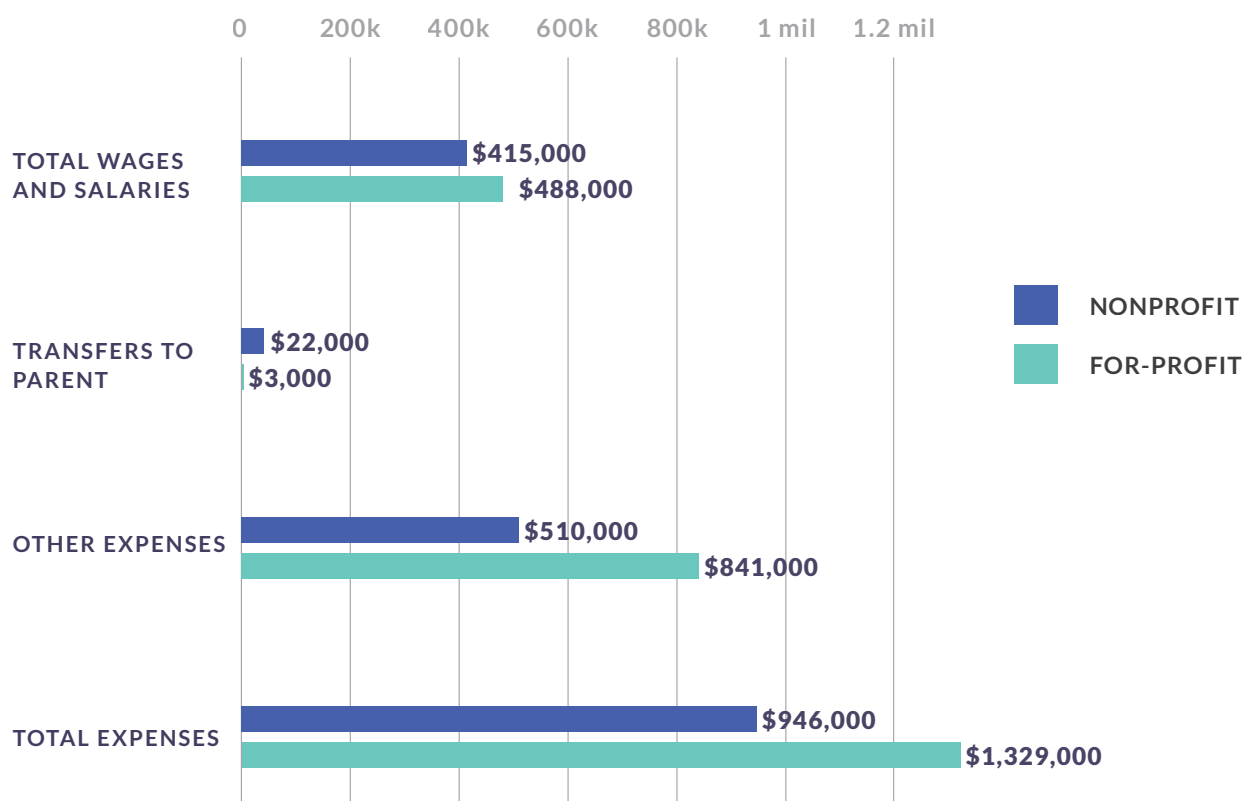
In 2014, for-profit social enterprises earned 1.2 times more in total revenues on average compared to nonprofit SEs

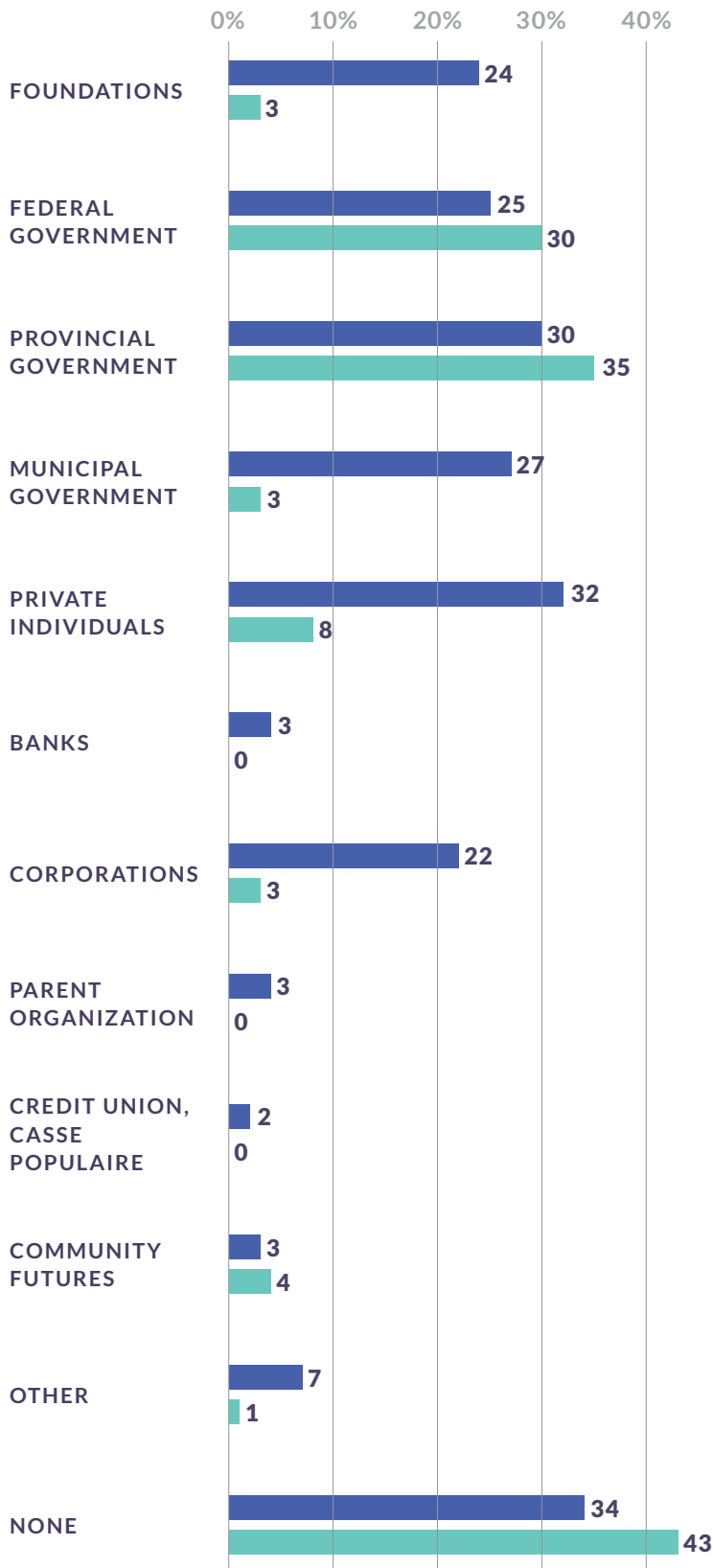
AVERAGE REVENUES (2014)



Compared to their nonprofit counterparts, for-profits, on average spent about 1.4 times more in total expenses. On average, for profits spent a lower percentage of total expenses on wages and salaries (37% vs 44%) and a higher percentage on all other operating expenses (63% vs 54%).

FOR-PROFIT & NONPROFIT AVERAGE EXPENSES (2014)





FOR-PROFIT & NONPROFIT SOURCES OF GRANTS (2014)

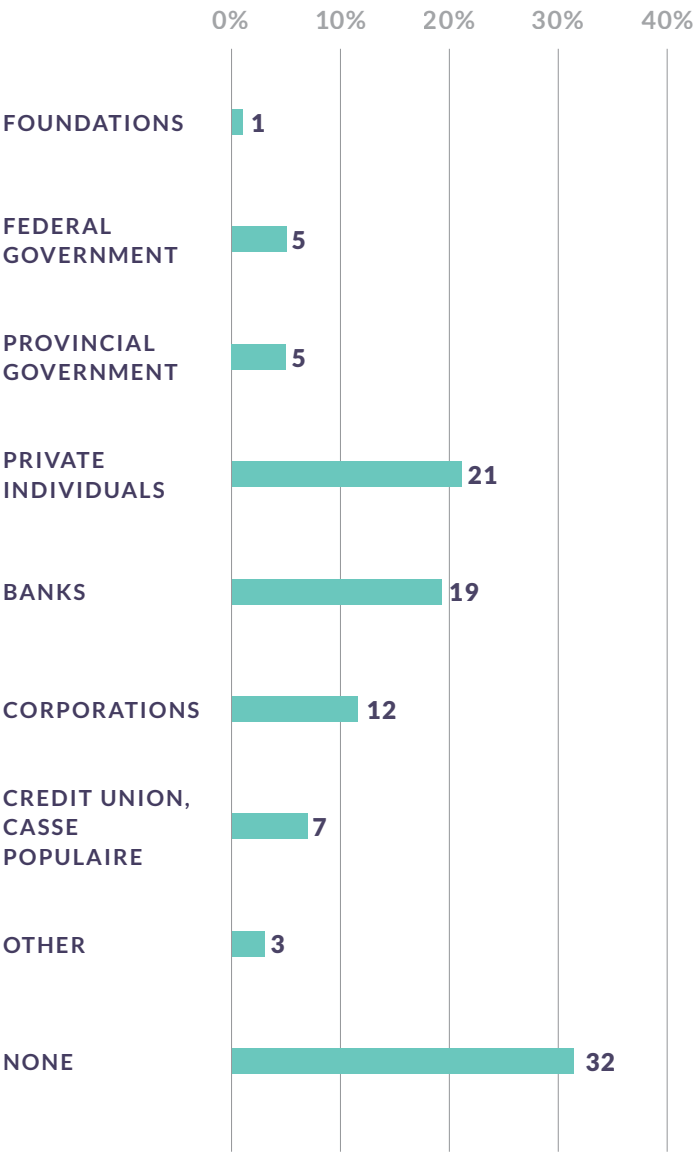
Sources of grants vary for for-profit and nonprofit social enterprises. Over a quarter of the for-profit social enterprises received grants from the provincial government (35%) and federal government (30%), similar to nonprofit SEs. For-profits are far less likely than nonprofits to receive grants from most other sources.

Note: For-profit organizations are not eligible to receive grants from a foundation or charity.

Over a quarter of the for-profit social enterprises received grants from the provincial government and federal government, similar to nonprofit SEs.

■ NONPROFIT
■ FOR-PROFIT

SOURCES OF LOANS: FOR-PROFITS



For profits are much more likely than non-profits to use debt financing (68% vs 25%) The top three sources of loans for for-profit are: Private individuals (22%), Banks (19%) and Corporations (12%). For nonprofits it is Banks (9%), Credit unions (6%) and Corporations (3%). For-profits are least likely to receive loans from Foundations (2%) and Municipalities, Parent organizations and Community Futures Development Corporations (all 0%)

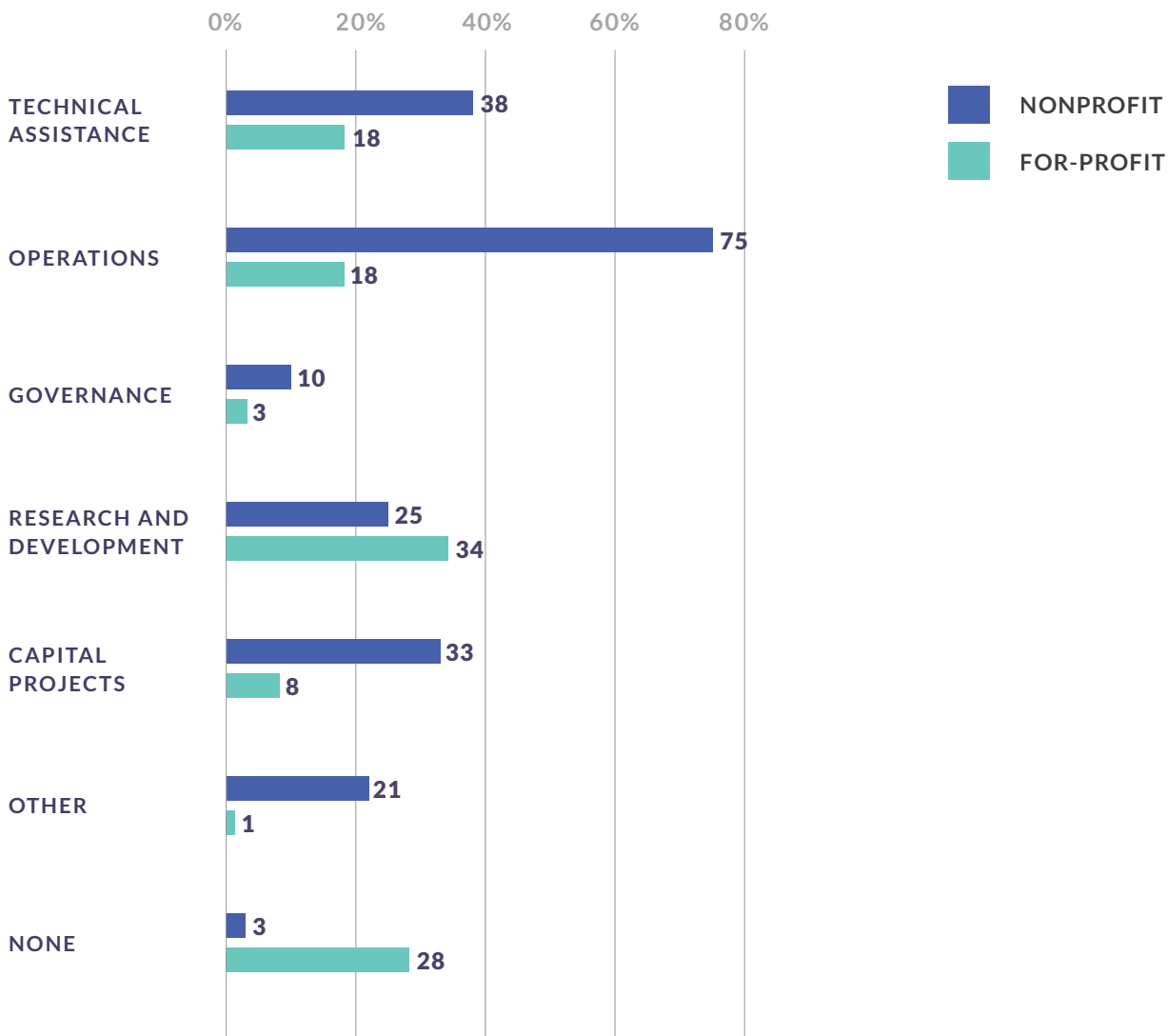
For-profit and nonprofit social enterprises also differ in how they use grants. The most common purpose of grants for for-profit social enterprises is research development, technical assistance and operations. Over 75% of nonprofit social enterprises use the grants for operations compared to about 18% of for-profit SEs.

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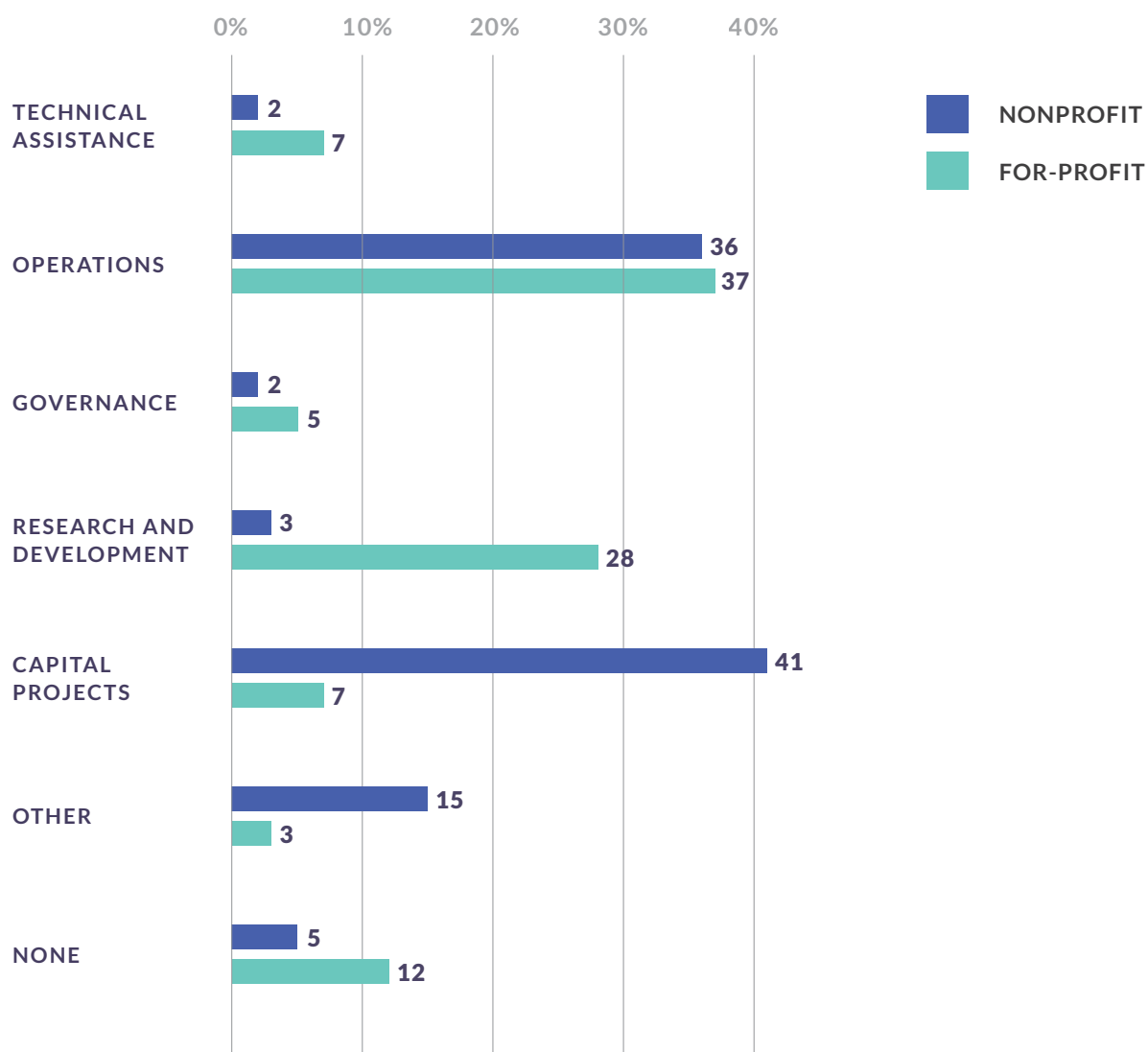
The most common purpose of grants for for-profit social enterprises is research development, technical assistance and operations.

FOR-PROFIT & NONPROFIT BY PURPOSE OF GRANTS (2014)

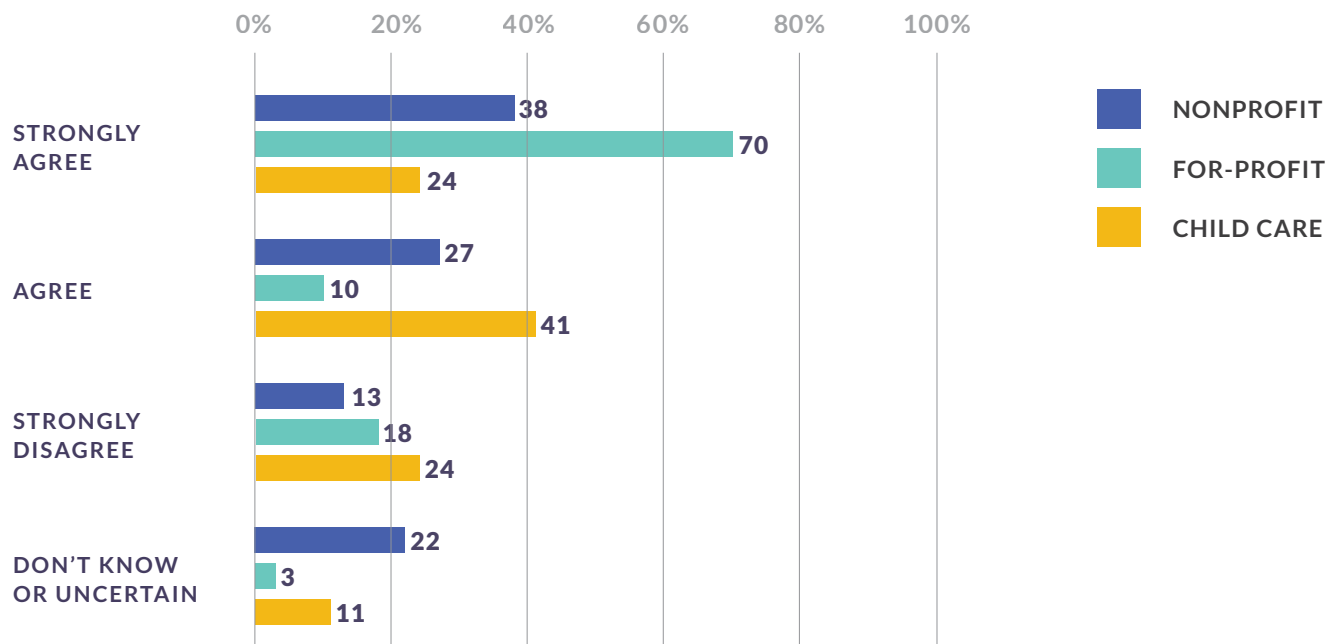


For-profit and nonprofit social enterprises are similar in their use of loans for operational expenses. They differ widely when it comes to Research and Development which is high for for-profits and capital which is high for nonprofits.

FOR-PROFIT AND NONPROFIT BY PURPOSE OF LOANS (2014)



FOR-PROFIT, NONPROFIT, AND CHILD CARE ENTERPRISES BY PLAN TO GROW THROUGH INCREASED SALES, (n=494)



Growth Strategies: For-profit, Nonprofit, and Child Care Enterprises

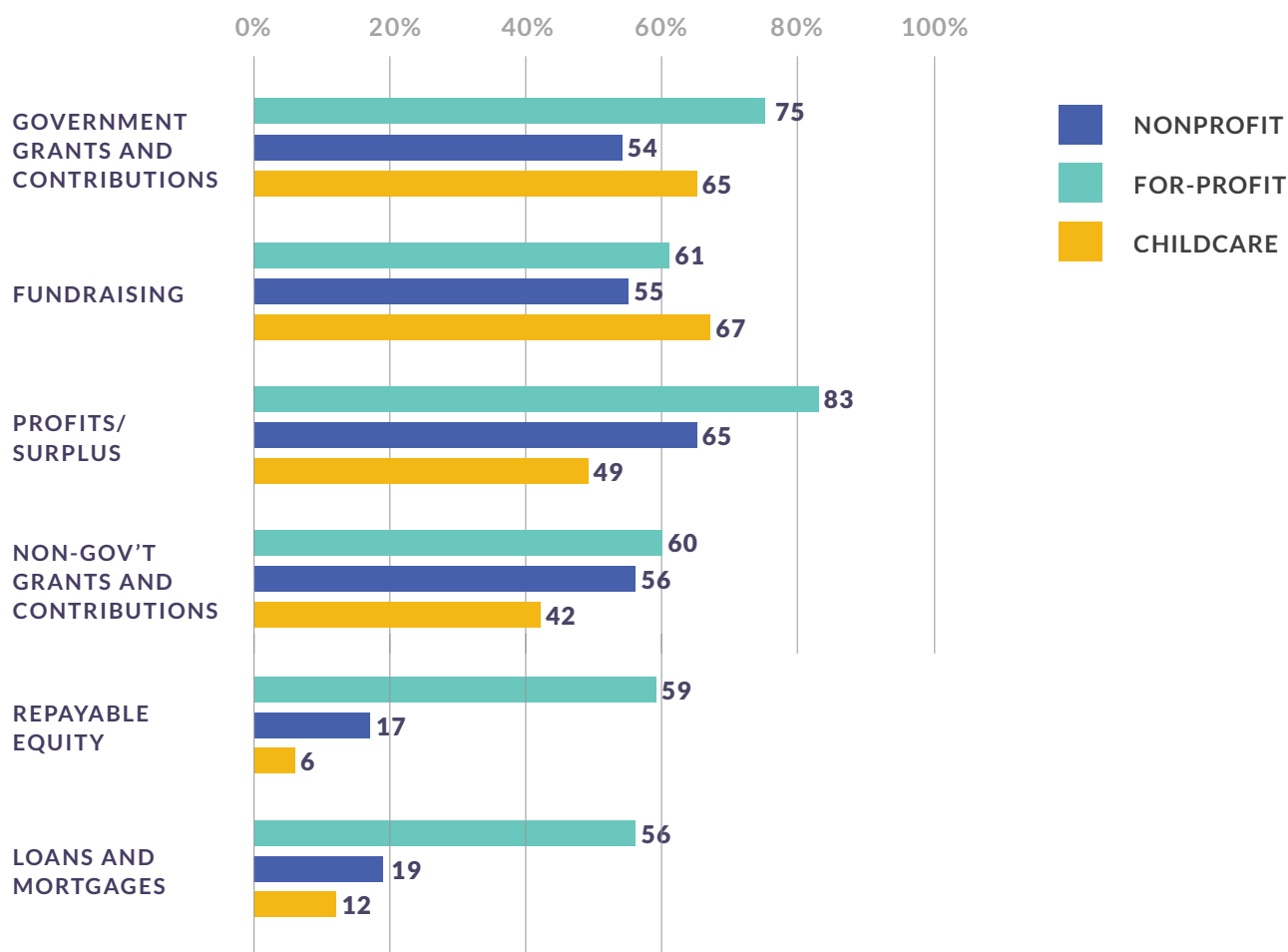
In order to gain an understanding of the importance of revenue growth from sales of goods and services respondents were asked to indicate the degree to which their social enterprise agrees that they plan to increase their revenues through the sale of goods and services over the next two years. 80% of for-profit social enterprises agreed or strongly agreed with the statement, while only 18% strongly disagreed.

65% of nonprofit SE respondents indicated that they strongly agreed or agreed with the statement, while only 13% strongly disagreed.

In addition to the revenue from sales of goods and services, other revenue sources that are significant to SEs were examined. Respondents were asked to select the likelihood of raising revenue from different sources, including government grants or contributions; non-government grants and contributions; fundraising; repayable equity; profits/surplus and loans and mortgages. Profits/surplus is the highest anticipated revenue source for both for-profits and nonprofits, but not child care, with for-profits being 18% higher than nonprofits (83% and 65%). Surprisingly perhaps, government grants are the second highest source for for-profits and fourth for nonprofits (75% and 54%). Non-government grants and fundraising are second third

in the list for nonprofits and are at similar percentages for for-profits (5% or 6% higher). However, well over one half of for -profits also anticipate revenue from repayable equity and loans and mortgages. These do not feature strongly in plans of nonprofits. For the non-profit child care respondents, profits/surplus is also a likely source of revenue (49%), though not as significant as revenue from fundraising (67%) and government grants and contributions (65%). (Combined Very Likely & Possibly where applicable, n=480)

ANTICIPATED REVENUE SOURCES COMPARED (n=513)



SECTION 9

Nonprofit Child Care Spotlight

In the nonprofit survey, child care organizations make up about 9.0% of Ontario's nonprofit social enterprise sector. It should be noted that these respondents include both single providers and larger providers with multiple sites, the largest having more than 200 sites. Some of the key impacts of this dynamic have been footnoted in the analysis below.

The child care organizations in the sample are most likely to be over 20 years old. Over half of respondents have been operating for 20-39 years¹⁰.

The majority of child care respondents are located in Toronto and East Ontario (both 23%). Slightly fewer operate in the South-West (20%) and Central South regions (18%). About 10% of nonprofit child care

organizations are located in the North, while only 8% are in the Central North region. There are about twice as many nonprofit child care organizations in urban communities compared to rural communities (68% vs. 33%)¹¹.

Nonprofit child care respondents are almost five times as likely, on average, to be anglo-phone organizations rather than francophone (85% vs. 15%).

Nonprofit child care providers employ more people and engage more volunteers than any other subsectors. In 2014, nonprofit child care organizations employed an average of 134 full-time equivalent (FTE) people, compared with 10 as the average number FTE for the rest of the nonprofit sector. This includes averages of 84 full-time employees, 112 part-time employees and 2 seasonal employees.

Child care organizations engage, on average, 132 volunteers, compared with an average of 59 for other nonprofits. Child care organizations provide services to somewhat fewer people – an average of 3,288– compared to the average of 4,114 for other nonprofit subsectors.

Nonprofit child care providers employ more people and engage more volunteers than any other SE subsectors.

Overall, compared to other nonprofit social enterprises, responding nonprofit child care organizations have four times higher, on average, total revenues and expenses, and nine times higher net profit (\$104K vs 12K) In 2014, nonprofit child care organizations earned, on average, over \$4 million in total revenues compared with \$960K for other

nonprofit SEs. Sales from goods and services account for 90% of these revenues. Grants from other organizations (not including a parent) are the second greatest source of revenue for child care organizations, bringing in an average of \$283K.

Wages and salaries make up about 77% of total expenses, with child care providers paying out an average total of \$3 million to their staff.

As shown in the table below, all three levels of government are a significant source of grants for nonprofit child care providers. None of the responding organizations received grants from a Community Futures Development Corporation and only 3% report receiving grants from a parent organization or a credit union. In general, nonprofit child care providers aren’t likely to take out loans.

Both grants and loans for nonprofit child care providers are most likely to be used for operations expenses and capital projects.

TOP 3 SOURCES OF GRANTS	TOP 3 SOURCES OF LOANS
Municipal Government – 76%	Banks – 19%
Provincial Government– 49%	Credit Unions– 6%
Federal Government; Private Individuals (tied) – 27%	...

TOP 3 PURPOSE OF GRANTS

Operations – 80%

Capital Projects– 51%

Technical Assistance– 26%

TOP 3 PURPOSE OF LOANS

Operations – 31%

Capital Projects– 23%

Other– 15%

TOP 5 CHALLENGES FOR NONPROFIT CHILD CARE

50%

ACCESS TO GRANT
CAPITAL

52%

LEGAL & REGULATORY
CONSIDERATIONS

52%

BUSINESS
PLANNING

61%

IT

69%

HUMAN RESOURCES

Of responding nonprofit child care organizations in our sample, 81% of report breaking even in 2014; however only 28% of these organizations broke even without grants. It is likely that many childcare providers classified their government revenue for subsidized day care places as grants.

Over half (55%) of nonprofit child care providers consider business revenue growth over the next two years as very important as part of their organization's strategic plan. Unlike the other nonprofit subsectors, child care organizations consider the likelihood of potential sources of revenue growth as fairly similar. For instance, the most likely source of revenue growth identified by this subsector is fundraising (27%), followed by government grants (24%) and profits/surpluses (21%). Similar to the rest of the nonprofit social enterprise sector, child care providers identify increasing business from individual customers as their most important growth strategy (77% say it is very important), while other strategies such as increasing business-to-business revenues (19%) and securing public contracts (18%) are less important.



Conclusion & Recommendations

Social Enterprise Continues to Impact Ontario's Economy

The research shows that Ontario's social enterprises are making a significant contribution to the provincial economy. In 2014, responding social enterprises generated an average of \$1.2 million in revenues, including \$0.9 million in sales. They employed an average of 38 employees, or 18 FTE and they paid an average of \$600K in salaries and wages. Furthermore, they trained an average of 115 people, provided services to over 8K people (excluding their customers) and engaged an average of 18 volunteers. These numbers reflect an increase from the 2011 data that is inspiring to see¹².

Cumulatively, survey respondents generated at least \$490 million in total revenues, including at least \$380 million in sales. They employed at least 14,000 people, including at least 7,500 FTEs and paid out at least \$252 million in wages and salaries. Responding social enterprises also trained about 57,000 people, provided services to over 4 million people (excluding their customers) and engaged over 25,000 volunteers in 2014.

These numbers represent just a fraction of the social enterprise sector, just 20% of those initially identified in the total sample frame and a small percentage of the 10,000 social enterprises that experts estimate are active in Ontario (Government of Ontario). There is no extrapolation within the Survey Findings of this report since this cannot be done in a way that would be considered statistically accurate. However, looking only at the most consistent sample frame available, the 2,250 SE nonprofit sector excluding childcare, and based on averages of the 454 respondents' data, the total revenue for this sector can be estimated as \$2.2.billion, employing 58,000 people.

Social Enterprise Addresses Social Needs

Beyond basic employment, Ontario's social enterprises are also addressing critical social needs in their communities with 45% of non-profit responding SEs working to reduce poverty, 20% employing or training people with disabilities and 50% of for-profit SEs focusing on serving women.

A Growing Sector

The number of SEs is growing. 10% of respondents are in the 0- 3 years age category. This means they did not exist when the initial 2012 survey was conducted. In addition, having a poverty focus is the highest in these new SEs (66%) and over 20% of new SEs are in the employment subsector, working with people who have barriers to employment.

Opportunities to Enable the Social Enterprise sector

This report shows that social enterprises identify the need for formal learning and training opportunities for practitioners and greater access to capital, particularly grant capital, to use towards recruiting talent and maintaining and expanding operations. The report highlights the fact that social enterprises have strategic plans to grow their sales and thus their impacts. Social procurement initiatives that encourage corporations, anchor institutions and governments to purchase through social enterprises can be effective tools in an Ontario strategy for sector growth. To maximize the potential for growth, particularly for SE's employing vulnerable populations, opportunities to build capacity also need to be in place so that supply and demand can be matched. Communities and governments need to work together to develop the policies and pathways that encourage both purchasing from and investment in social enterprise. Greater efforts to increase awareness of social enterprise, its diversity and its impacts would help the sector collaborate and would grow community buy-in of both the neighborhood and large scale social enterprises that are addressing pressing local needs.

Considerable gains have been made by community practitioners, intermediary organizations and governments to promote and facilitate the development of the social enterprise sector in Ontario. The development of community benefit and social procurement policies and the availability of loan capital are areas where there is currently significant momentum. In considering the six pillars in the development framework for social enterprise¹³, these supports work to enhance the pillars relating to market opportunities, regulatory framework and capital, or at least loan capital. There is currently less support to create momentum relating to the pillars of building practitioner skills, promoting and demonstrating value and networking. If community, government and business work all together to fill these gaps, social enterprises will thrive and scale up their social and economic impacts across Ontario.

Additional Research

More research is needed to better understand the dynamics of social enterprises in different contexts.

While it is valuable to have a current profile of the broad social enterprise sector, this report demonstrates that the barriers for growth vary widely for nonprofit and for-profit enterprises, for each of the subsectors, across rural and urban communities, among francophone organizations and along different stages of development. Additional research targeting these various subsectors would provide rich data, as would research that includes those SEs run by governments, particularly First Nations and municipalities. Given that 46% of the nonprofit sector's revenues come from the

sale of goods and services¹⁶, and that this is a \$435.5 billion sector, it is clear that this survey does not capture all of the entrepreneurial and market-related activities run by Ontario's nonprofit organizations. This survey also only scratches the surface of the for-profit SE sector with the identification and confirmation of these enterprises being an ongoing challenge.

Further research that improves understanding of the operations and requirements of all organizations intentionally providing economic social and environmental benefits, as well as the intermediary organizations that train, support and network them, will encourage the development of policies and programs that will enable the sector to continue to grow and thrive.

Further Opportunities to Promote Ontario Social Enterprises

A related social enterprise initiative that the Canadian CED Network is growing in partnership with the Ontario Nonprofit Network and Pillar Nonprofit Network is the development of an online directory, one of the many social enterprise resources on SEontario.org (French version: ESontario.org). With interest in social procurement growing across the province, this is a great opportunity for social enterprises to be included in a directory where people can discover you. We encourage social entrepreneurs to benefit from this promotion by putting your organization on the map or submitting your SE story to have your work featured.

If your social enterprise was not contacted for this survey, we recommend that you contact CCEDNet Ontario so that we can promote your business and ensure your work is captured in the next survey.

Ontario@ccednet-rcdec.ca

Notes

- ¹ http://theonnc.ca/wp-content/uploads/2011/09/Backgrounder_Feb2012_final.pdf
- ² <http://socialeconomyhub.ca>
- ³ In the survey, the respondents were able to identify themselves as either a non-distributing or distributing co-op. Simply, non-distributing co-ops are those which do not require their members to buy shares in the co-op. In Ontario, these co-ops are referred to informally as nonprofit co-ops even though technically this type of incorporation doesn't exist for co-ops. For accessibility reasons, we've decided to refer to non-distributing co-ops as nonprofit co-ops in this report.
- ⁴ Due to sampling limitations, it is likely that nonprofit co-ops are over-represented in the housing and miscellaneous subsectors. Sampling included the full population of housing co-operatives in Ontario, but no such list was available for nonprofit housing organizations that are not co-ops. The response rate for nonprofit co-ops outside of the housing subsector was insufficient to analyze these co-ops as a unique group.
- ⁵ To more accurately compare the 2015 and 2012 surveys, nonprofit child care and housing organizations are excluded in the 2015 group for this comparison. This is because these organizations weren't represented in the 2012 survey.
- ⁶ This is for nonprofit social enterprises which aren't child care organizations.
- ⁷ Access to external capital is a combination of Access to loan capital and Access to grant capital challenge categories.
- ⁸ Statistics Canada 2011 census as quoted by Ontario Office of Francophone Affairs
<http://www.ofa.gov.on.ca/en/franco.html>
- ⁹ Note: 35% of all respondents actually selected these disability categories but the following analysis corrects for respondents who selected 13 or more target populations, that is respondents who selected almost every category to indicate that they work with all populations.
- ¹⁰ For multi-site providers their age is when they opened their first site. There are many recent sites opened by larger providers unaccounted for in these numbers.

-
- 11 It is possible that these differences could be due to sampling and the large number of multi-site providers in some areas.
- 12 Includes nonprofit and for-profit respondents
- 13 Social Enterprise Council of Canada, SiG, MaRS; Synopsis: Canadian Conference on Social Enterprise Policy Forum and Invitation to Engage in Next Steps, 2010
<http://seontario.org/wp-content/uploads/2014/10/Policy-forum-recommendations-2009.pdf>
- 14 http://theonnn.ca/wp-content/uploads/2015/04/ONNSubmissionHybridLegislation-MGCS_2015-03-23.pdf
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APPENDIX A:

Ontario 2015 Social Enterprise Survey Questionnaire

This is a survey of social enterprises in Ontario.

“A social enterprise is a business venture owned or operated by a non-profit organization that sells goods or provides services in the market for the purpose of creating a blended return on investment, both financial and social/environmental/cultural”

The questionnaire is designed for quick completion.

Please complete check the appropriate box for each question, or insert dates, numbers, amounts or text as requested.

Please provide the following details about your organization	
Name of organization	
Mailing address	
Postal code:	
Phone number (with area code):	
1.0 Year of formation and operation. Please answer parts 1.1 and 1.2	
1.1 In which year was your social enterprise formed (incorporate/ approve its founding constitution?	
1.2 in which year did your social enterprise first start selling products or services?	
2. What is the PURPOSE of your Social Enterprise?	
Please check all that apply	
Social purpose	<input type="radio"/>
Cultural purpose	<input type="radio"/>
Environmental purpose	<input type="radio"/>
Income generation for parent organization	<input type="radio"/>
Employment development	<input type="radio"/>
Training for workforce integration	<input type="radio"/>
2.1 In your own words, what is the PRIMARY MISSION of your social enterprise?	<input type="radio"/>

3.0 Does your social enterprise have members?	
Yes	<input type="radio"/>
No	<input type="radio"/>
3.1 If yes, how many members do you have?	
4.0 What is the form of incorporation of your social enterprise? Please check all that apply	
Non-Profit corporation	
Co-operative	
Limited liability corporation	
Other (Please specify)	
5.0 Is your social enterprise a registered charity with the Canada Revenue Agency?	
Yes	<input type="radio"/>
No	<input type="radio"/>
6.0 Do you have a parent organization?	
Yes	<input type="radio"/>
No	<input type="radio"/>
6.1 If yes, what is the name of your parent organization?	
6.2 What is your relationship with the parent organization? Select the one option which best describes your relationship with the parent organization:	
We have no parent organization	
We are an in-house program, project or department of the parent	
We are a separate organization that works closely with the parent	
We are an independent organization, operating at arm's length from a parent organization	
6.3 Did your parent organization regularly provide any of the following supports in the past 12 months? Please check all that apply	
Personnel (time of staff, admin, management, etc)	
In-kind (goods, materials, transportation, etc)	
Space (offices, storage, accommodations, etc)	
Finance (grants, loans, loss write-off, etc)	
Other (Please specify)	

7.0 What is the name of the municipality (town, city, village, district or reserve) in which your main office is located?	
7.1 In which of the following geographic areas or scales do you operate or provide services? Please check all that apply	
Neighbourhood / local community	<input type="radio"/>
City / town	<input type="radio"/>
Region (county / regional district)	<input type="radio"/>
Province	<input type="radio"/>
National (other parts of Canada)	<input type="radio"/>
International	<input type="radio"/>
Other (Please specify)	<input type="radio"/>

8.0 In which sectors does your social enterprise sell products and/or services? Please check all that apply.	
<input type="radio"/> Accommodation (overnight, short-term)	<input type="radio"/> Movers/hauling
<input type="radio"/> Administrative services	<input type="radio"/> Personal services
<input type="radio"/> Agriculture, forestry, fishing, mining	<input type="radio"/> Printing and publishing
<input type="radio"/> Arts and culture	<input type="radio"/> Production/manufacturing
<input type="radio"/> Communications (mail, radio, internet)	<input type="radio"/> Professional services
<input type="radio"/> Construction	<input type="radio"/> Property Management
<input type="radio"/> Consulting	<input type="radio"/> Public administration/services to government
<input type="radio"/> Day care	<input type="radio"/> Real estate (development and management)
<input type="radio"/> Education	<input type="radio"/> Repair and Maintenance
<input type="radio"/> Emergency and relief	<input type="radio"/> Research
<input type="radio"/> Employment services	<input type="radio"/> Retail sales (incl. Thrift stores)
<input type="radio"/> Environment and animal protection	<input type="radio"/> Scientific/technical services
<input type="radio"/> Facilities (banquet, conference, party)	<input type="radio"/> Services to private businesses
<input type="radio"/> Finance and insurance	<input type="radio"/> Services to social enterprises, cooperatives, non-profits, charities and their employees
<input type="radio"/> Food service/catering	<input type="radio"/> Sewing
<input type="radio"/> Food production	<input type="radio"/> Social services (incl. income, social work)
<input type="radio"/> Food distribution	<input type="radio"/> Sports and Recreation
<input type="radio"/> Gallery/arts	<input type="radio"/> Theatre/performing arts
<input type="radio"/> Health care (incl. hospital, nursing, clinic, crisis care, addictions, etc)	<input type="radio"/> Tourism
<input type="radio"/> Housing (long-term rental, assisted, etc)	<input type="radio"/> Transportation and storage
<input type="radio"/> Janitorial/cleaning (incl. street cleaning)	<input type="radio"/> Waste management (incl. recycling)
<input type="radio"/> Landscaping/Gardening	<input type="radio"/> Wholesale sales
<input type="radio"/> Law, advocacy, politics	<input type="radio"/> Other – please specify:

9.0 Which of the following demographic groups does your social enterprise train, employ or provide services to as part of your mission? Please check all that apply:	
<input type="checkbox"/> All the people living in a particular place / community	<input type="checkbox"/> People living with addictions
<input type="checkbox"/> Aboriginal / indigenous people	<input type="checkbox"/> People living with employment barriers
<input type="checkbox"/> Children	<input type="checkbox"/> People living with psychiatric disabilities
<input type="checkbox"/> Ethnic group / minority	<input type="checkbox"/> People living with intellectual disabilities
<input type="checkbox"/> Family	<input type="checkbox"/> People living with physical disabilities
<input type="checkbox"/> Homeless persons	<input type="checkbox"/> Refugees
<input type="checkbox"/> Immigrants (including temporary workers, permanent residents, etc)	<input type="checkbox"/> Senior / aged / elderly
<input type="checkbox"/> Lower income individuals	<input type="checkbox"/> Women
<input type="checkbox"/> Men	<input type="checkbox"/> Youth / young adults / students
<input type="checkbox"/> Other – please specify:	
9.1 – 9.3 We would like to know about how many people in the target populations listed in Question 9.0 you trained, employed or provided with services. It is okay to count the same person in more than one category. Estimated totals are acceptable. Do not include people who are exclusively the retail customers of your social enterprise.	
9.1 From the groups listed above, in 2014, how many people did you train?	
9.2 From the groups listed above, in 2014, how many people did you employ?	
9.3 From the groups listed above, in 2014, how many people did you provide services to?	
10.0 How many people were employed or volunteering at your social enterprise during 2014? Estimated totals are acceptable. Please include those who you employed as part of your mission (see question 9.3)	
Full-time paid employees (30 or more hrs/week)	
Part-time paid employees (less than 30 hrs/week)	
Seasonal employees (30 or more hours per week for more than 2 weeks but less than 8 months)	
If known, TOTAL FTEs (full time equivalent employment at 2000 hours p.a.)	
Freelancers and contract workers (hired for a specific project or term)	
Volunteers (incl. unpaid interns, etc) who worked 10 or more hrs/month	
Volunteers (incl. unpaid interns, etc) who worked less than 10 hrs/month	
11.0 We would like to know about the revenue and expenses in 2014 of your social enterprise. Estimated totals are acceptable. Please fill in as much detail as you can, and round off amounts to the nearest \$1,000.	
REVENUE	
Revenue from sales of goods and services, including service contracts with government	
Revenue from grants and donations received from parent organization (do not include loans)	
Revenue from grants and donations from other organizations and private individuals (do not include loans)	
Total revenue from all sources	
EXPENSES	
Total wages and salaries paid, including target groups in training within your social enterprise	
Total financial transfers to parent organization	
Total expenses on all items	

12.0 What were the sources of grants and donations received in 2014? Please check all that apply:	
<input type="radio"/> Foundations	<input type="radio"/> Parent organization
<input type="radio"/> Government	<input type="radio"/> Credit Union
<input type="radio"/> Private individuals, philanthropists, donors	<input type="radio"/> Community Futures
<input type="radio"/> Bank	<input type="radio"/> Other – please specify:
<input type="radio"/> Corporations/Private businesses	<input type="radio"/> No grants and donations received

12.1 What were the sources of loans/ debt instruments taken out in 2014? Please check all that apply:
<input type="radio"/> Foundations
<input type="radio"/> Government
<input type="radio"/> Private individuals, philanthropists, donors
<input type="radio"/> Bank
<input type="radio"/> Corporations/Private businesses
<input type="radio"/> Parent organization
<input type="radio"/> Credit Union
<input type="radio"/> Community Futures
<input type="radio"/> Other – please specify:
<input type="radio"/> No loans or debt instruments taken out
12.2 What were the purposes of grants and donations received in 2014? Please check all that apply:
<input type="radio"/> Technical assistance grants
<input type="radio"/> Operational grants
<input type="radio"/> Long-term loans / equity
<input type="radio"/> Short-term loans
<input type="radio"/> Other – please specify:
12.3 What were the purposes of loans/ debt instruments taken out in 2014? Please check all that apply:
<input type="radio"/> Technical assistance grants
<input type="radio"/> Operational grants
<input type="radio"/> Long-term loans / equity
<input type="radio"/> Short-term loans
<input type="radio"/> Other – please specify:

This section of the survey will pose some question relating to challenges your social enterprise may be facing. Please indicate which areas factors pose a challenge to your social enterprise by rating each item on the following scale:

Not a challenge, Small challenge, Moderate challenge, Significant challenge, or not applicable.

Governance Challenges	Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
Internal expertise to drive our social enterprise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board of director involvement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal and regulatory considerations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting our organizational mission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Challenges	Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
Access to external capital to invest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
in the social enterprise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budgeting and accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cash flow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operational Challenges	Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
Business planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Logistics for production and/or distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales of products and/or service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human resources (e.g. training, qualified staff, employee retention)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internal resources (e.g. equipment, facilities)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information technology (e.g. computers, software, and website)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
Contract procurement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advertising/publicity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are there any other challenges you would like to note?					

This section of the survey will ask about educational resources which would be relevant and useful to your social enterprise. Please respond by rating each resource on a scale of:
Not Helpful, Somewhat Helpful, Helpful, Very Helpful, or Not Applicable

Governance educational resources	Not Helpful	Somewhat Helpful	Helpful	Very Helpful	Not Applicable
Legal and regulatory advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
specific to social enterprises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial educational resources	Not Helpful	Somewhat Helpful	Helpful	Very Helpful	Not Applicable
Capital and social purpose	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
investment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial planning support and training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operational educational resources	Not Helpful	Somewhat Helpful	Helpful	Very Helpful	Not Applicable
Support and training on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
information technology (IT)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational growth and capacity building strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tools to enhance staff capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tools to measure the social and/or environmental impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing educational resources	Not Helpful	Somewhat Helpful	Helpful	Very Helpful	Not Applicable
Communications/public relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training about social media and	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
developing an online presence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An online marketplace to sell products and/or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are there any other challenges you would like to note?					

This section of the survey will ask about educational resources which would be relevant and useful to your social enterprise. Please rate each suggested educational resource.

Governance educational resources

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Legal and regulatory advice specific to social enterprises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Financial educational resources

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Capital and social purpose investment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Financial planning support and training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Operational educational resources

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Support and training on information technology (IT)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Organizational growth and capacity building strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Tools to enhance staff capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Tools to measure the social and/or environmental impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Marketing educational resources

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Communications/public relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Networking information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Training about social media and developing an online presence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	An online marketplace to sell products and/or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Preference re delivery of education resources, support, and training

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Offline workshops and/or in-person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Preference re delivery of education resources, support, and training						
		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	training					
	Online/ Live webinars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Coaching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Online access to manuals and how-to guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there any additional education resources, support and training needs you would like to bring to our attention?	
<div></div>	

This-section of the survey will ask about growth strategies which would be relevant and useful to your Social enterprise. Please respond by rating each strategy on the appropriate scale.

Please indicate the degree to which your social enterprise agrees or disagrees with the following statement:					
		Strongly agree	Agree	Strongly disagree	Don't know/ Uncertain
	We plan to increase our revenues through the sale of goods and services over the next two years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How likely is your social enterprise to raise revenues from the following sources over the next two years:					
		Very likely	Possibly	Not likely	Don't know/ Uncertain
	Government grants or contributions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Non-government grants and contributions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Repayable equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Profits/ surplus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Loans/ mortgages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there any other sources from which your social enterprise plans to raise revenues over the next two years?	<div></div>
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Please rate the importance of the following statement						
		Not Important	Somewhat important	Moderately important	Very important	Don't know/ Uncertain
	Business revenue growth over the next two years as a part of the strategic plan for our social enterprise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate the importance of the following strategies to the revenue growth plan for your social enterprise over the next two years						
		Not Important	Somewhat important	Moderately important	Very important	Don't know/ Uncertain
	Business from public contracts (i.e.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate the importance of the following strategies to the revenue growth plan for your social enterprise over the next two years						
		Not Important	Somewhat important	Moderately important	Very important	Don't know/ Uncertain
	government or institutional RFPs)					
	Business from for-profit or nonprofit businesses (i.e. sales embedded in formal corporate supply chain)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Business from employees in for-profit or nonprofit (i.e. sales to an individual personal relationship within a corporation)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Business from individual consumers or customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

This final section of the survey will ask whether your social enterprise has taken any steps to measure the impact of your goods or services on the health and well-being of the following groups.

Health and Social Enterprise			
Has your social enterprise taken any steps to measure the impact of your social enterprise's goods or services on the health and well-being of the following groups?			
		Yes	No
	Target population(s) <u>in</u> your social enterprise (eg volunteers, trainees or employees) Yes/ No If yes, please explain		<div></div> <div></div> <div></div> <div></div>
	Target population(s) <u>outside</u> your social enterprise (eg customers or community) Yes /No - If yes, please explain		<div></div> <div></div> <div></div> <div></div>

APPENDIX B:

Cross Comparative Data on Social Enterprise in Ontario, 2012 & 2015

(Nonprofit, No Child Care or Housing)

	Ontario 2015 Survey (n=331)	Ontario 2012 Survey (n=363)
Demographic profile		
Year of formation: median	1998	1997
Year of first sale: median	2001	1999
Number of business sectors (1-7) average	2.8	2.3
Number of targeted populations (0-17): average	5.4	4.8
Members: average in previous year	260.0	238.6
Trained: average in previous year	138.3	208.6
Employed (from target group): average in previous year	26.8	16.3
Served: average in previous year	5,530	9,120
FTEs: average in previous year	11.1	9.3
Volunteers (full- and part-time): average in previous year	64.5	56.8
Purpose (% of social enterprises)		
Employment development	31.8%	36.9%
Employment training	22.4%	29.2%
Income generation for parent organization	28.7%	33.9%
Social mission	76.9%	77.4%
Cultural mission	46.0%	46.6%
Environmental mission	45.5%	42.4%
Target groups (% of social enterprises)		
All the people living in a particular place/ community	64.6%	67.5%
Aboriginal/Indigenous people	26.3%	22.0%
Children	31.8%	26.7%

Target groups (% of social enterprises) cont.	Ontario 2015 Survey (n=331)	Ontario 2012 Survey (n=363)
Ethnic minority	24.6%	31.1%
Families	41.4%	28.4%
Homeless people	19.8%	13.5%
Immigrants	23.2%	25.1%
Men	38.4%	35.3%
Lower income individuals	44.7%	47.4%
People with addictions	24.1%	13.2%
People with employment barriers	33.8%	29.5%
People with physical disabilities	28.0%	27.8%
People with psychological disabilities	26.9%	19.0%
People with intellectual disabilities	30.0%	31.7%
Refugees	17.3%	11.0%
Senior/aged/elderly	35.4%	27.8%
Women	44.6%	42.4%
Youth/young adults	49.5%	47.1%
Legal/Organizational structure (% of social enterprises)		
Non-profit corporation/society	74.4%	87.6%
Limited liability corporation (for-profit)	0%	-
Co-operative, non-distributing	24.8%	-
Co-operative, nonprofit distributing	0%	-
Credit union/Caisse populaire	0%	
Registered charity	61.1%	57.9%
Has a parent organization	41.4%	51.8%
Financial profile		
Total expenditure: average in previous year	\$971,200	\$814,200
Total wages and salaries: average in previous year	\$490,660	\$517,600

Financial profile		
Total expenditure: average in previous year	\$971,200	\$814,200
Total wages and salaries: average in previous year	\$490,660	\$517,600
Revenue from sales of goods & services: average in previous year	\$614,260	\$548,700
Revenue from grants/loans/donations from parent: average in previous year	\$48,900	\$47,000
Revenue from all other grants/loans/donations: average in previous year	\$209,480	\$232,800
Revenue exceeds expenses in previous year	75.3%	84.9%
Financial profile		
Sales as percent of revenue: average per org in previous year	68.6%	65.1%
Revenue less grants/loans/donations exceeds expenses in previous year	44.1%	51.7%
Purpose Classification		
Social, Environmental and/or Cultural only	46.2%	39.1%
Income focused	20.8%	20.1%
Multi-purpose	33.1%	40.8%
Moderate-Significant Challenges (% of social enterprises)		
Internal expertise to drive SE	53.9%	54.0%
Board of Director involvement	50.2%	37.1%
Legal & regulatory considerations	55.7%	35.8%
Meeting organizational mission	29.3%	25.0%
Access to external capital	87.9%	79.8%
Budgeting & accounting	27.8%	38.3%
Cash flow	46.2%	47.3%
Business planning	47.9%	41.9%
Logistics for production/distribution	36.5%	51.8%
Sales of goods and/or services	41.7%	45.2%

Moderate-Significant Challenges (% of social enterprises) cont.	Ontario 2015 Survey (n=331)	Ontario 2012 Survey (n=363)
Human resources	47.6%	45.6%
Internal resources	56.3%	38.2%
Moderate-Significant Challenges (% of social enterprises)		
Information technology	42.1%	58.1%
Contract procurement	35.1%	54.5%
Access to customers	47.2%	49.1%
Advertising/publicity	55%	47.5%
Brand recognition & awareness	51.6%	-
Helpful-Very Helpful Resources (% of social enterprises)		
Legal & regulatory advice specific to SE	56%	66.1%
Capital & social purpose investment opportunities	60.8%	60.3%
Financial planning support & training	57%	67.5%
Support & training on information technology (IT)	50.9%	49.1%
Organizational growth & capacity building strategies	67.7%	78.9%
Tools to enhance staff capacity	66.2%	77.8%
Tools to measure social/environmental impact	68.9%	75.8%
Communications/public relations	67.8%	75.6%
Networking information	56.6%	75.1%
Helpful-Very Helpful Resources (% of social enterprises)		
Training on social media & developing an online presence	65.6%	72.6%
An online marketplace to sell products & services	51.6%	56.7%
Offline workshops/in-person training	61.7%	-
Online/Live webinars	70.2%	-
Coaching	56.1%	-
Online access to manuals & how-to guides	68.7%	-

Appendix C: Detailed Survey Method

Subsector Treatment (Nonprofit Survey)						
First email invitation	Arts & Culture, Thrift Stores, Employment, Farmers' Markets, Miscellaneous	Franco phone	Non-Co-op Housing	Housing Co-ops	Co-operatives (not child care or housing)	Child Care
First email invitation	✓	✓	Sent to membership of Ontario Non Profit Housing Association	✓	✓	✓
First follow-up	Email (excluding those who bounced/refused/weren't eligible)		-	Email (excluding those who bounced/refused/weren't eligible)		
Second follow-up	Phone if available	Phone if available	-	Phone if available	Phone if available	Email (excluding those who bounced/refused/weren't eligible)
Third follow-up	Phone/Email if left voice message	-	-	-	Phone/Email if left voice message	-
Final reminder	Email (excluding those who bounced/refused/weren't eligible)	Email	-	Email	Email	Email

Complete breakdown of number of respondents and non-respondents (nonprofit survey)

	Arts & Culture	Co-ops (not housing/child care)	Farmers' Markets	Housing Co-ops	Miscellaneous	Employment Enterprises	Thrift	Franco phone	Child Care
Social Enterprises Initial List	335	406	161	587	230	168	361	126	1250
Not Contactable	17	204	9	159	2	1	5	15	66
Contacted, not Social Enterprise	13	12	13	9	17	5	5	1	1
Confirmed List of Social Enterprises	305	190	139	419	211	162	351	110	1183
No Response	242	149	91	351	146	51	120	80	1113
Refused to Participate	11	21	12	7	9	1	37	3	14
Incomplete responses	8	3	4	9	6	6	6	3	16
Valid Respondent Social Enterprises	44	17	32	52	50	42	188	24	40
Response Rate	14%	4%	23%	9%	24%	26%	54%	22%	3%
Unique Respondents	44	17	32	52	50	42	38	24	40
Number of Sites	-	-	-	-	-	74	189	-	682

Variables which needed clarification; includes:

- ▶ Confirming the difference between customers (not counted in this survey), those receiving services, and those receiving training.
- ▶ Clarifying employment counts. For example, adjusting when members of targeted populations are employed in contract positions, and hence do not form part of the FTE count.
- ▶ Reconciling and completing financial data. For example, when social enterprises without a parent organization did not indicate transfers to/from a parent, this was re-coded as \$0.
- ▶ Some respondents were unable to provide an estimate of the Full-Time Equivalent (FTE) positions in their organization. In calculating Estimated FTEs, if the respondent provided an FTE count, this was accepted. Otherwise an estimate based on 1 FTE per full-time employee, 0.5 per part-time, and 0.25 per seasonal was calculated. Missing data were regarded as 0 for this calculation.
- ▶ Social enterprises that did not provide complete financial data were not included in the analysis of the financial questions.
- ▶ Operating surplus was calculated as revenue minus expenses. This measurement allowed social enterprises that broke even to be identified (i.e., showed a net surplus of zero or more in the 2014 financial year).

Appendix D: Average Revenues & Expenses by Subsector

Note: This table represents the responses of 322 nonprofit organizations that provided complete financial information. All numbers reported are for the 2014 fiscal year. For for-profit financials, see Appendix F.

	Arts & Culture (n=50)	Child Care (n=24)	Housing (n=66)	Farmers' Markets (n=21)	Employment (n=24)	Thrift (n=63)	Miscellaneous (n=74)
Revenue from sales of goods/ services, incl service contracts with govt	\$521,210	\$3,746,650	\$632,905	\$41,750	\$639,960	\$564,680	\$998,080
Revenue from grants & donations received from parent	\$195,540	\$10,560	\$2,230	\$2060	\$61880	\$340	\$5,010
Revenue from grants & donations from other orgs and individuals	\$298,550	\$283,030	\$13,200	\$3,295	\$89,750	\$2,680	\$480,150
Total revenue (all sources)	\$1,136,930	\$4,161,460	\$842,675	\$65,730	\$807,785	\$570,780	\$1,575,610
Total wages & salaries paid	\$580,580	\$3,096,510	\$139,580	\$10,810	\$414,550	\$247,530	\$810,290
Transfers to parent	\$610	\$63,160	\$0	\$7,250	\$5,240	\$93,940	\$2,720
Total expenses on all items	\$1,139,890	\$4,046,360	\$831,710	\$56,740	\$799,970	\$552,700	\$1,556,870
Net profit (Revenue - Expenses)	-\$2,960	\$115,100	\$10,960	\$8,990	\$7,820	\$18,080	\$18,740
% of Revenue from sales	45.8%	90.0%	75.1%	63.5%	79.2%	98.9%	63.3%
Net profit without grants	-\$497,040	-\$178,490	-\$4,470	\$3,630	-\$143,810	\$15,060	-\$466,420
Trained: average in previous year	61	308	5	12	59	60	311
FTEs: average in previous year	11	134	1	1	12	8	19
Total Employed: average in previous year	39	207	5	2	36	14	47
Served: average in previous year	16,542	3,280	246	1,617	464	1,502	2,471
Volunteers (full- and part-time): average in previous year	95	189	33	22	48	57	66

Appendix E: Detailed Employment & Financial Averages by Age of Social Enterprise (rounded)

Note: This table represents the responses of 255 nonprofit organizations that provided complete financial information and their age. It does not include nonprofit child care providers. All numbers reported are for the 2014 fiscal year.

For a comparison of nonprofit, for-profit and child care financials, see Appendix F.

	0-3 Years n=33	4-9 Years n=37	10-19 Years n=57	20-39 Years n=105	40+ Years n=23
Revenue from sales of goods/ services, incl service contracts with govt	\$86,300	\$394,780	\$594,300	\$619,350	\$2,261,780
Revenue from grants & donations received from parent	\$9,620	\$36,200	\$36,490	\$25,630	\$235,280
Revenue from grants & donations from other orgs and individuals	\$16,990	\$53,350	\$446,510	\$86,170	\$710,840
Total revenue (all sources)	\$113,490	\$574,260	\$1,125,680	\$899,980	\$3,322,970
Total wages & salaries paid	\$48,750	\$178,440	\$469,370	\$318,180	\$1,851,000
Transfers to parent	\$18,160	\$32,180	\$32,990	\$8,360	\$6,190
Total expenses on all items	\$105,480	\$56100	\$1,104,490	\$896,610	\$3,293,360
Net profit (Revenue - Expenses)	\$8,010	\$8,160	\$21,190	\$3,370	\$29,620
% of Revenue from sales	76%	69%	53%	69%	68%
Net profit without grants	-\$18,590	-\$81,390	-\$461,810	-\$108,430	-\$916,510
FTEs: average in previous year	1.9	8.4	8.6	11.0	17.2
Total Employed: average in previous year	6.5	19.1	34.6	27.1	49.6
Trained: average in previous year	26	173	246	61	133
Served: average in previous year	439	1,401	9,554	1,511	17,690
Volunteers (full- and part- time): average in previous year	41	85	73	51	108

Appendix F: Detailed Employment & Financials for Nonprofit, For-profit and Child Care

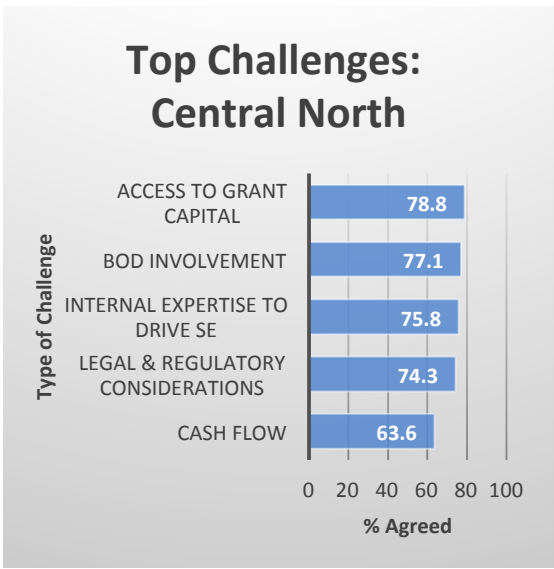
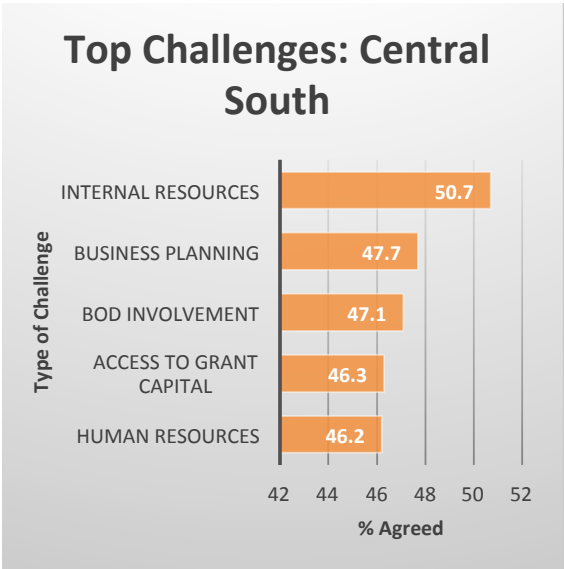
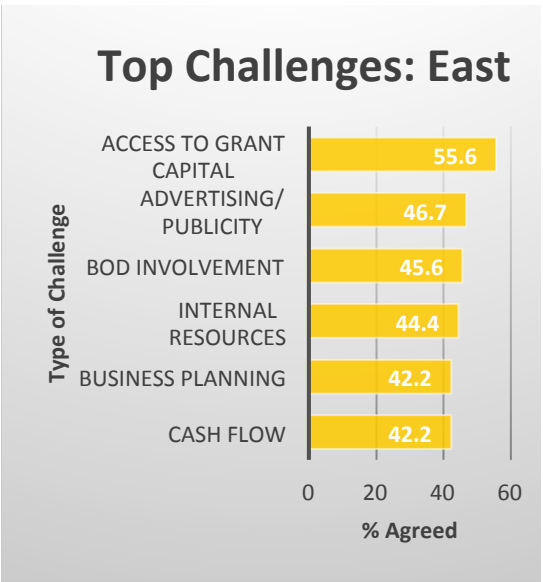
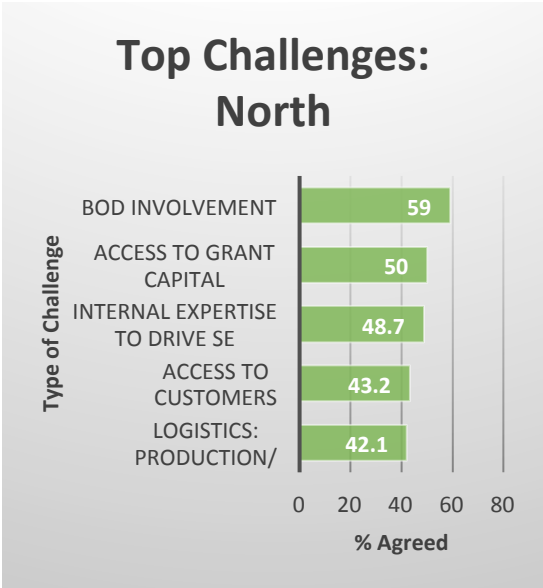
Only respondents who provided complete financial information are included here.
All numbers are for the 2014 fiscal year.

	Nonprofit (n=298)	Nonprofit Child Care (n=24)	For-profit (known n=47)	Total Sector Respondents (n=369)
Average Revenue from sales of goods/ services, incl. service contracts with govt	\$649,280	\$3,746,650	\$1,106,420	\$910,210
Average Revenue from grants & donations received from parent	\$39,850	\$10,560	\$3,400	\$33,290
Average Revenue from grants & donations from other orgs and individuals	\$179,840	\$283,030	\$48,070	\$169,810
Average Total revenue (all sources)	\$958,540	\$4,161,460	\$1,186,890	\$1,197,240
Average Total wages & salaries paid	\$415,750	\$3,096,510	\$488,460	\$600,450
Average Transfers to parent	\$21,650	\$63,160	\$3,190	\$22,010
Average Total expenses on all items	\$946,880	\$4,046,360	\$1,329,350	\$1,198,440
Average Net profit (Revenue - Expenses)	\$11,660	\$115,100	-\$142,450	-\$1,200
% of Revenue from sales	68%	90%	93%	76%
Average Net profit without grants	-\$208,030	-\$178,490	-\$193,930	-\$204,300
FTEs: average in previous year	10	134	10	18
Total Employed: average in previous year	26	207	14	38
Trained: average in previous year	103	308	69	115
Served: average in previous year	4,110	3,280	39,060	8,380
Volunteers (full- and part-time): average in previous year	59	189	5	64

Appendix G: Detailed Challenges & Helpful Resources Charts

Major Challenges by Region

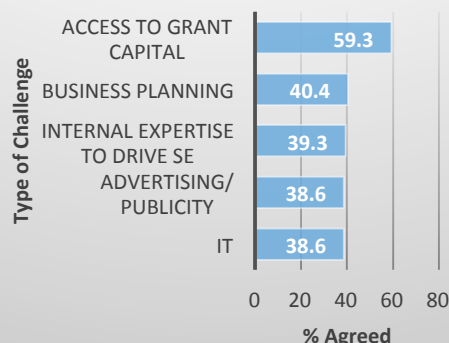
These charts are based on the responses of 397-408 (varying according to available data) nonprofit organizations and do not include nonprofit child care providers. The ‘% agreed’ reports the percentage of respondents that indicated that this was a significant or moderate challenge. Given the number of respondents in some areas, not all percentages would be considered statistically significant. They do however provide an indication of respondent’s priorities. The biggest differences between regions are for Internal expertise to drive the social enterprise, Meeting the organizational mission, Access to grant capital, Cash flow, Logistics for production/ distribution, Internal resources, Information technology and Advertising/publicity.



Top Challenges: South-West



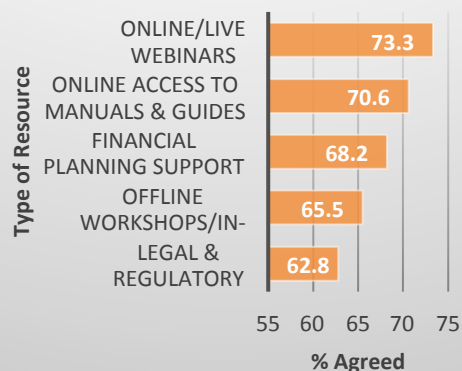
Top Challenges: Toronto



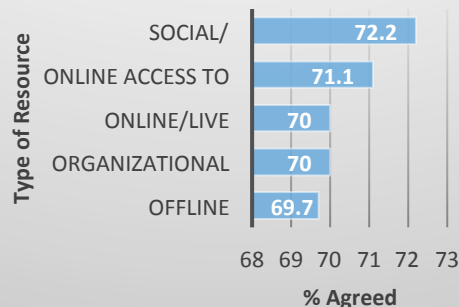
Most Helpful Resources by Region

These charts represent the responses of 393-407 (varying according to available data) nonprofit organizations and do not include nonprofit child care providers. The ' % agreed ' reports the percentage of respondents that indicated that this was a helpful of very helpful. Given the number of respondents in some areas, not all percentages would be considered statistically significant. They do however provide an indication of respondent's priorities. The biggest differences between regions are for Legal and regulatory advice specific to social enterprise, Organizational growth and capacity building, Social/environmental impact measurement tools, Networking information and Online/live webinars.

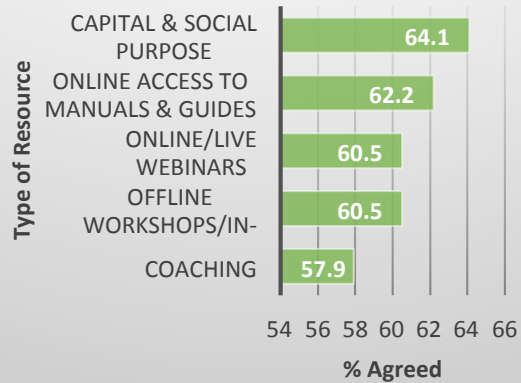
Most Helpful Resources: Toronto



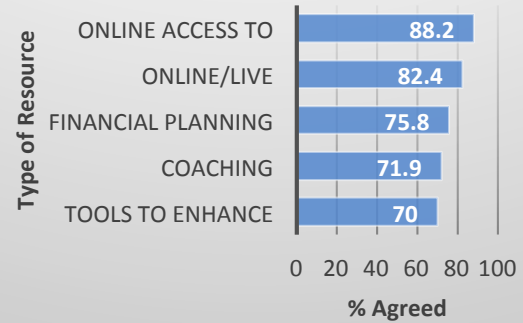
Most Helpful Resources: South-West



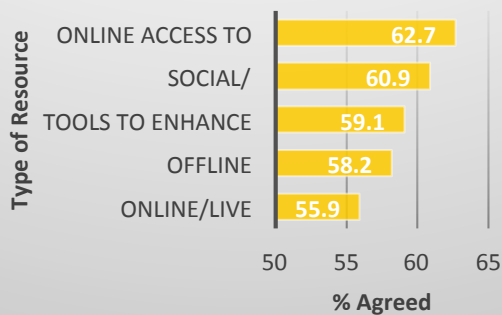
Most Helpful Resources: North



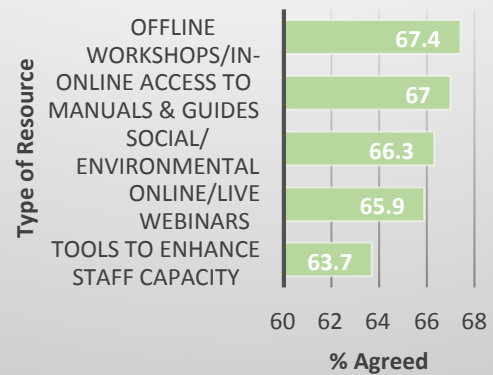
Most Helpful Resources: Central North



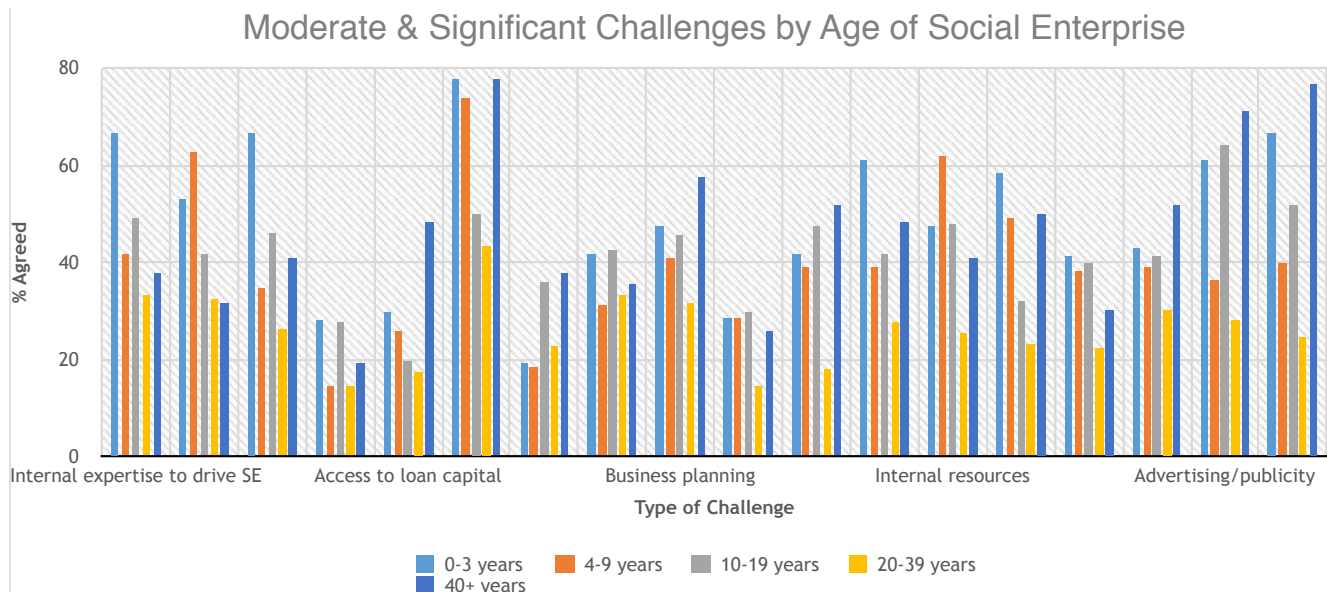
Most Helpful Resources: Central South



Most Helpful Resources: East



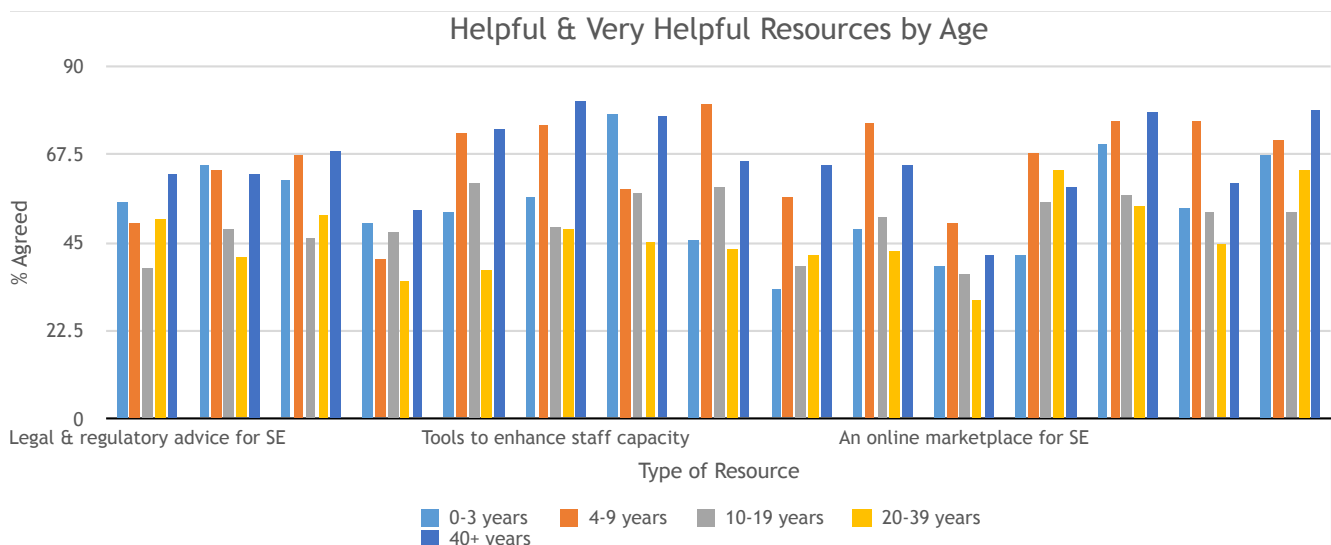
Major Challenges by Age



This chart represents nonprofit respondents only and does not include nonprofit child care providers.

The smallest differences between age groups are for Contract procurement and Business planning.

Most Helpful Resources by Age



This chart represents nonprofit respondents only and does not include nonprofit child care providers. The strongest differences are for IT support and training, Organizational growth and capacity building, Communications/publicity, Networking information, Social media training, Online marketplace and Online/Live webinars.

Major Challenges & Most Helpful Resources by Overall Nonprofit Subsector

This table represents responses from 404 nonprofit organizations and 40 nonprofit child care providers. Highlighted numbers show the top 5 responses for each subsector.

Moderate-Significant Challenges (% of social enterprises)	Thrift (n=69)	Farmers' Markets (n=28)	Arts & Culture (n=79)	Employment (n=30)	Housing (n=103)	Miscellaneous (n=95)	Child Care (n=40)
Internal expertise to drive SE	89.9%	35.7%	41.8%	50.0%	26.2%	45.3%	42.4%
Board of Director involvement	76.8%	41.4%	40.2%	25%	32.4%	50.5%	34.3%
Legal & regulatory considerations	73.7%	18.5%	26.5%	37.5%	38.5%	40.4%	51.5%
Meeting organizational mission	55.4%	14.3%	24.4%	25.8%	17.6%	19.4%	23.5%
Access to loan capital	1.8%	18.5%	28.9%	25.8%	22.9%	29.2%	20.5%
Access to grant capital	43.6%	39.3%	72.6%	71.9%	31.1%	63.4%	50%
Budgeting & accounting	3.6%	28.6%	32.5%	35.5%	15.1%	38.8%	41.2%
Cash flow	40.4%	40.7%	48.8%	50%	25.2%	48.5%	39.4%
Business planning	80.4%	35.7%	39.2%	50%	28.8%	34.3%	51.5%
Logistics for production/distribution	67.9%	21.4%	23.2%	41.9%	0.9%	26.5%	9.4%
Sales of goods and/or services	23.2%	29.6%	53.8%	61.3%	2%	43%	31.4%
Human resources	59.6%	48.1%	49.4%	56.3%	25.5%	34%	68.6%
Internal resources	85.7%	28.6%	60.2%	59.4%	13.5%	36.2%	45.5%
Information technology	49.1%	34.5%	39.8%	40.6%	12.9%	41%	60.6%
Contract procurement	8.8%	16.7%	30.1%	64.5%	10.2%	55.4%	15.2%
Access to customers	22.2%	53.6%	61.4%	56.3%	6.5%	47.9%	45.4%
Advertising/publicity	25%	55.2%	71.6%	62.5%	8.5%	62%	14.7%
Brand recognition & awareness	23.2%	44.4%	49.4%	68.8%	8.3%	70%	48.5%

Helpful-Very Helpful Resources (% of social enterprises)	Thrift	Farmers' Markets	Arts & Culture	Employment	Housing	Miscellaneous	Child Care
Legal & regulatory advice specific to SE	61.4%	40.7%	52.4%	53.1%	51.4%	59.8%	70.6%
Capital & social purpose investment opportunities	80%	29.6%	56.1%	75%	38.1%	56.1%	29.4%
Financial planning support & training	72.7%	32.1%	61%	58.1%	59.4%	50.5%	41.2%
Support & training on information technology (IT)	77.2%	39.3%	45.2%	38.7%	36.8%	41.8%	55.9%
Organizational growth & capacity building strategies	91.2%	44.4%	72%	67.7%	53.1%	53.1%	52.9%
Tools to enhance staff capacity	92.9%	44.4%	70.4%	71.9%	45.2%	47.4%	67.6%
Tools to measure social/environmental impact	89.5%	50%	58.5%	71.9%	35.6%	66%	50%
Communications/public relations	84.2%	64.3%	64.6%	66.7%	31.1%	58%	67.6%
Networking information	52.6%	69.2%	58.8%	53.1%	27.5%	54.5%	55.9%
Training on social media & developing an online presence	88.5%	64.3%	62.7%	61.3%	32.7%	54.1%	51.5%
An online marketplace to sell products & services	83%	32.1%	48.2%	41.9%	12.3%	39.1%	35.3%
Offline workshops/in-person training	57.1%	69%	69%	67.7%	75.5%	55.6%	75.8%
Online/Live webinars	89.3%	53.6%	59.5%	64.5%	59.4%	72.4%	68.8%
Coaching	52.7%	46.4%	61.4%	59.4%	47.6%	55.9%	63.6%
Online access to manuals & how-to guides	87.5%	57.1%	59.8%	56.3%	70.8%	70.1%	75.8%

Major Challenges & Most Helpful Resources for For-profit, Nonprofit and Child Care Social Enterprises

Highlighted numbers indicate the top responses for each sample group.

Moderate-Significant Challenges (% of social enterprises)	Nonprofit (n=409)	Nonprofit Child Care (n=35)	For-profit (n=73)
Internal expertise to drive SE	47%	42.4%	49.3%
Board of Director involvement	45.7%	34.3%	19.2%
Legal & regulatory considerations	41.4%	51.5%	45.2%
Meeting organizational mission	26.4%	23.5%	47.9%
Access to loan capital	21.8%	20.5%	76.7%
Access to grant capital	53.2%	50%	80.6%
Budgeting & accounting	24.8%	41.2%	38.4%
Cash flow	40.6%	39.4%	86.3%
Business planning	43.2%	51.5%	32.9%
Logistics for production/distribution	27.3%	9.4%	39.7%
Sales of goods and/or services	31.6%	31.4%	68.5%
Human resources	42.1%	68.6%	63.9%
Internal resources	45.4%	45.5%	30.1%
Information technology	29.4%	60.6%	27.7%
Contract procurement	28.5%	15.2%	53.5%
Access to customers	36.5%	45.4%	67.1%
Advertising/publicity	43.2%	14.7%	61.6%
Brand recognition & awareness	40.2%	48.5%	65.3%

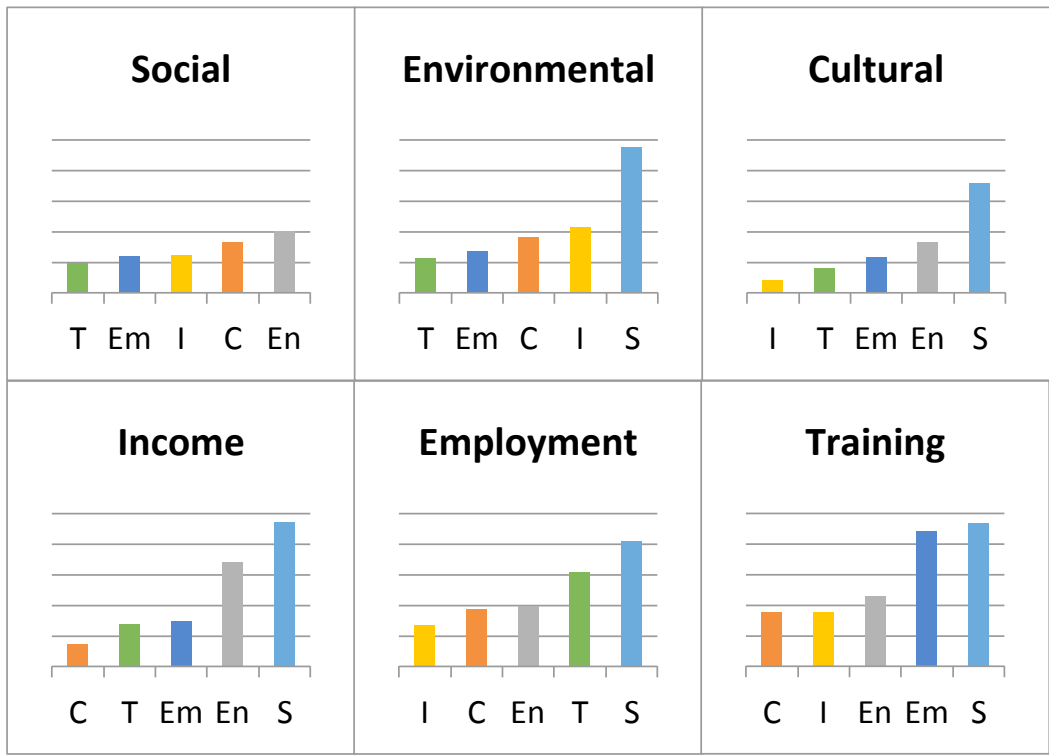
Helpful-Very Helpful Resources (% of social enterprises)	Nonprofit (n=409)	Nonprofit Child Care (n=35)	For-profit (n=73)
Legal & regulatory advice specific to SE	54.7%	70.6%	50%
Capital & social purpose investment opportunities	55.3%	29.4%	71.2%
Financial planning support & training	57.5%	41.2%	49.3%
Support & training on information technology (IT)	47.2%	55.9%	19.2%
Organizational growth & capacity building strategies	59%	52.9%	49.3%
Tools to enhance staff capacity	61%	67.6%	52.1%
Tools to measure social/ environmental impact	60.6%	50%	57.5%
Communications/public relations	58.6%	67.6%	64.4%
Networking information	49.5%	55.9%	49.3%
Training on social media & developing an online presence	57.2%	51.5%	49.3%
An online marketplace to sell products & services	41.4%	35.3%	38.4%
Offline workshops/in-person training	65%	75.8%	56.2%
Online/Live webinars	67.3%	68.8%	55.6%
Coaching	53.9%	63.6%	58.9%
Online access to manuals & how-to guides	69.1%	75.8%	52.8%

Appendix H: Additional Purpose & Structure Information

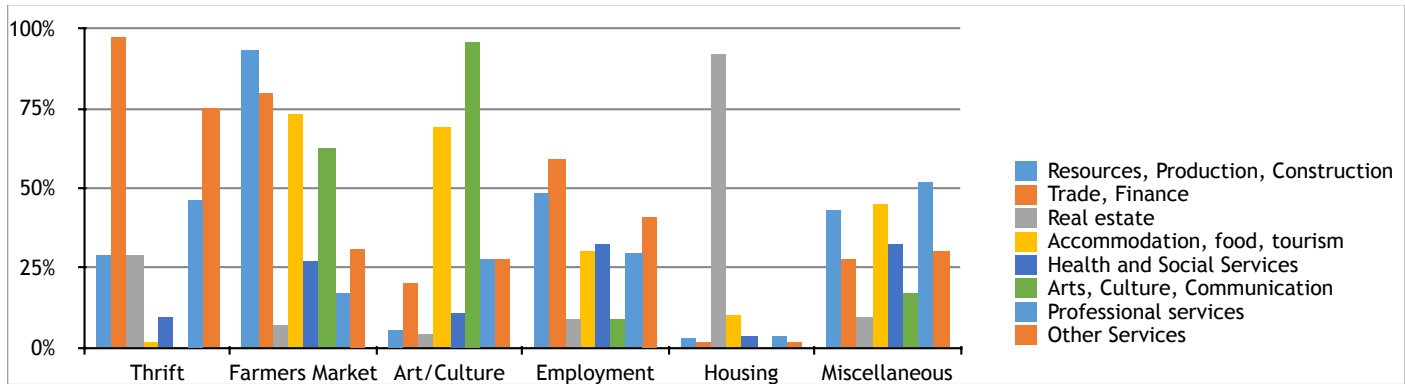
The information shown here represents the responses of 450 nonprofit organizations and does not include nonprofit child care providers.

Purpose Combinations

These charts demonstrate the likelihood that purposes are chosen together. Some combinations are more common than others. Social purpose is the most commonly combined with all others; for example, almost every respondent who identifies with environmental also identifies with social. The link between environmental and income generation purposes is fairly strong, and so is the link between employment and training. The cultural/income generation combination is the least common. Other weak linkages include the cultural/training combination and the income/training combination.



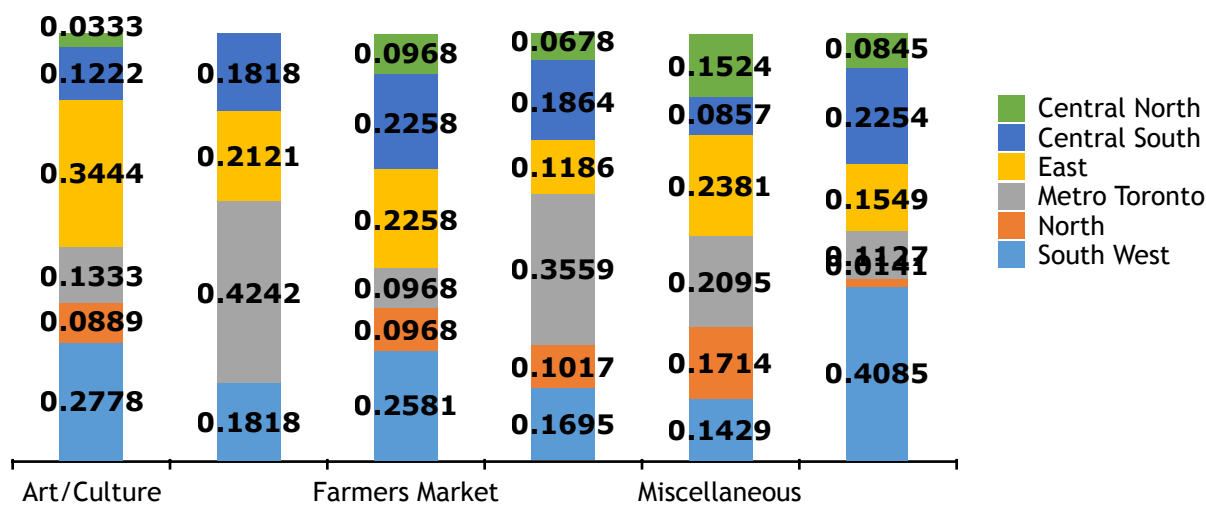
Type of Industry by Nonprofit Social Enterprise Subsector



Appendix I: Additional Geographic Information

The information shown here represents the responses of 449 nonprofit organizations and does not include nonprofit child care providers.

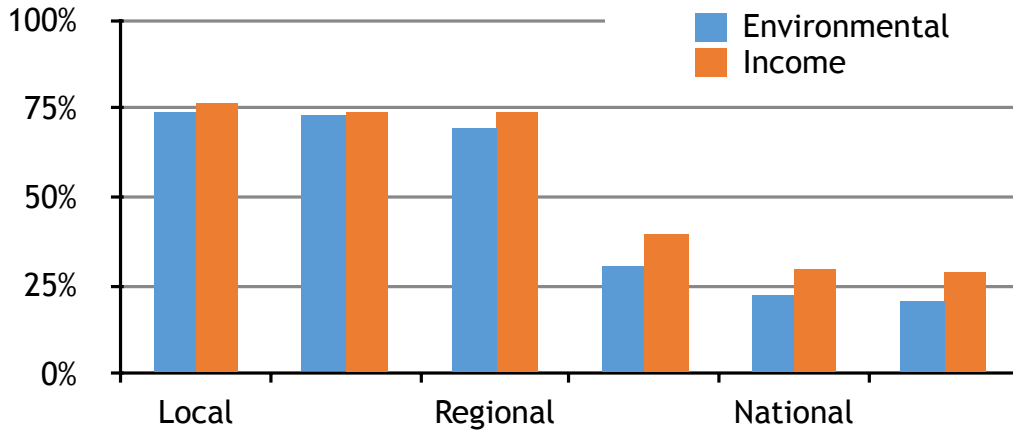
Regional Representation by Nonprofit Subsector



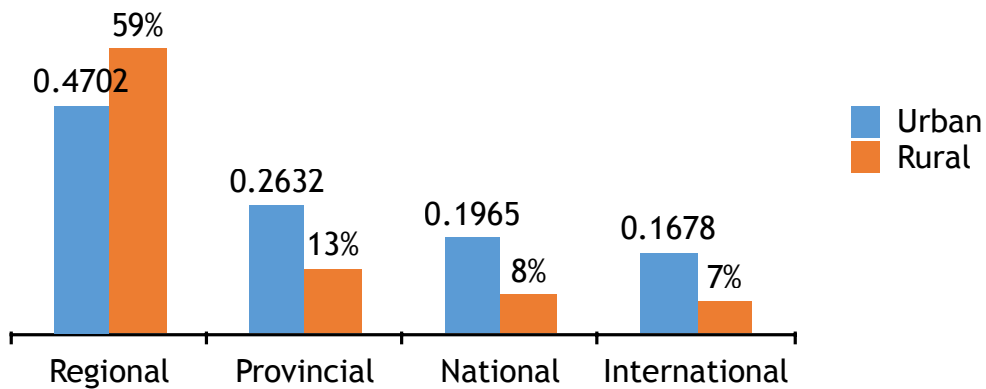
Region & Charitable Status

Although results show that the relationship between region and presence of co-ops is not statistically significant, the relationship between region and charitable status is. The proportion of social enterprises with charitable status is highest among respondents in the South West, Toronto and East regions, where over 50% identify as registered charities running a social enterprise. It is lowest in the North region, with less a quarter of respondents identifying this way.

Geographic Scale of Operation & Environmental/Income Purpose



Geographic Scale of Operation by Rural/Urban Classification



Appendix J: Breakdown of Counties by Region

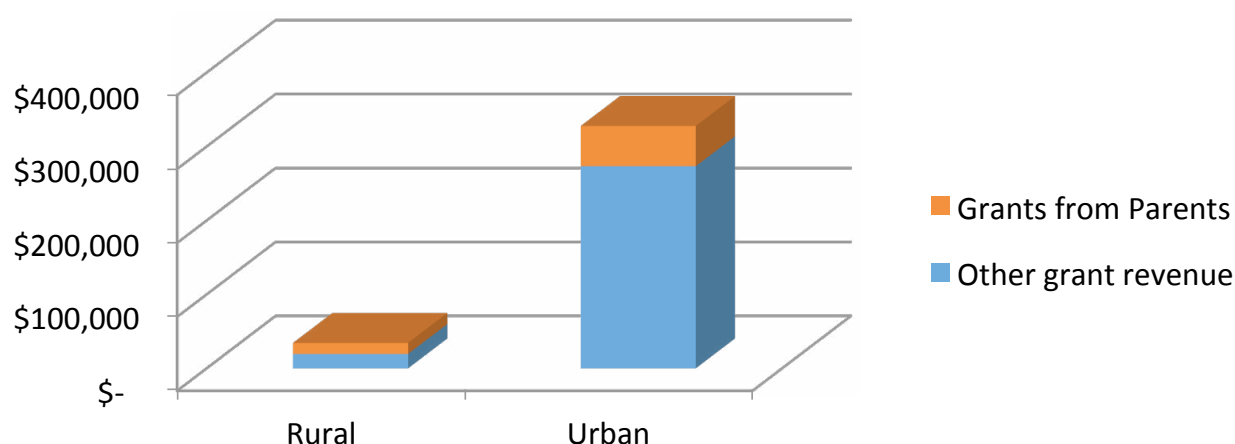
Region	County	Population
Central North		
	Simcoe	446,063
	Bruce	66,102
	Muskoka	58,047
	Grey	92,568
Central South		
	Halton	501,669
	Hamilton	519,949
	York	1,032,524
	Durham	608,124
	Peel	1,296,814
	Halton	501,669
East		
	Leeds and Grenville	99,306
	Ottawa	883,391
	Prescott and Russell	85,381
	Lanark	65,867
	Northumberland	82,126
	Frontenac	149,738
	Haliburton	17,026
	Renfrew	101,326
	Stormont, Dundas and Glengarry	111,164
	Prince Edward	25,258
	Lennox and Addington	41,824
	Kawartha Lakes	73,214
Toronto		
	Toronto	2,615,060

North		
	Rainy River	20,370
	Timiskaming	32,634
	Nipissing	84,736
	Parry Sound	42,162
	Greater Sudbury / Grand Sudbury	160,376
	Algoma	115,870
	Manitoulin	13,048
	Sudbury	21,196
	Cochrane	81,122
	Kenora	57,607
	Thunder Bay	146,057
	Rainy River	20,370
	Timiskaming	32,634
	Nipissing	84,736
South-West		
	Essex	388,782
	Middlesex	439,151
	Haldimand-Norfolk	109,118
	Brant	136,035
	Oxford	105,719
	Lambton	126,199
	Huron	59,100
	Waterloo	507,096
	Chatham-Kent	104,075
	Perth	75,112
	Wellington	208,360
	Elgin	87,461
	Niagara	431,346

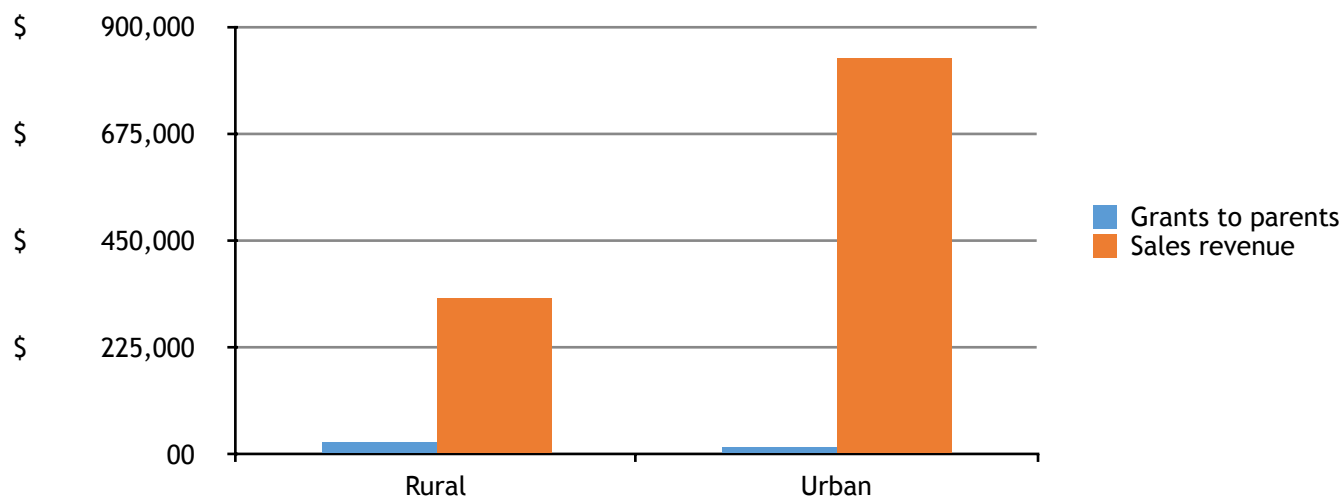
Appendix K: Detailed Financial Comparison for Rural-Urban Social Enterprises

These charts represent responses from 298 nonprofit organizations, 110 Rural and 188 Urban) who provided complete financial information for the 2014 fiscal year. Nonprofit childcare providers are not included in this analysis.

Rural-Urban Nonprofit SEs 2014 Grants from Parent vs other Grants (n=98)



Rural-Urban 2014 Sales Revenues & Transfers to Parent (no child care, n=298)



Appendix L: Cross-Comparative Data on Social Enterprise by Province (October 2015)

[illegible]

	Surveys conducted in 2014								2015
	AB	BC	MB	NB	NS	PE *	TR **	All 2014	ON ***
Non-profit legal structure	96	90.1	86.5	75.2	72.8	87.5	89.4	82.4	58
Registered charity	61	65.5	51.8	52.7	53.7	62.5	52.3	56.2	48
Target groups (percent of nonprofit social enterprises):									
All the people living in a particular place / community	73.3	65.3	63.1	62	59.5	87.5	76.6	64.9	63.8
First Nations / Indigenous people	25.7	41.3	34.2	27.9	6	18.8	68.1	26.3	24.5
Children	47.5	40.5	25.2	37.2	9.5	18.8	51.1	29.3	28.9
Ethnic minority	21.8	29.8	24.3	28.7	6.9	25	27.7	20.5	23.3
Families	42.6	37.2	25.2	41.9	9.1	25	57.4	29.3	44
People living without homes	8.9	20.7	11.7	16.3	3	12.5	25.5	11.8	19.3
Immigrants	15.8	22.3	23.4	23.3	6	25	23.4	16.9	22.7
Lower income individuals	23.8	38.8	31.5	41.9	8.2	25	42.6	26.8	47.6
Men	29.7	33.9	28.8	37.2	7.8	25	51.1	26	34.9
People living with addictions	8.9	22.3	13.5	19.4	5.6	18.8	21.3	13.5	20.2
People living with employment barriers	17.8	30.6	22.5	28.7	10.8	18.8	23.4	20.6	29.1
People living with psychiatric disabilities	13.9	28.1	16.2	24.8	15.9	6.3	14.9	18.9	22.7
People living with intellectual disabilities	14.9	31.4	26.1	29.5	24.1	25	19.1	25	26
People living with physical disabilities	20.8	33.1	24.3	32.6	19.4	31.3	17	24.8	27.1
Refugees	7.9	9.9	12.6	10.1	1.7	12.5	8.5	7.5	16
Senior / aged / elderly	41.6	37.2	33.3	37.2	13.8	37.5	40.4	30.3	36.4
Women	36.6	41.3	35.1	45.7	11.6	31.3	55.3	32.1	39.8
Youth / Young adults	49.5	43.8	36.9	50.4	23.3	43.8	63.8	39.6	41.9
Sources of grants and donations received in 2013/4									
Foundations	25.3	43.5	33.3	25.6	20.7	31.3	12.8	27.2	24.2
Federal Government	21.1	27	30.6	35.7	31.9	43.8	42.6	31.1	24.9
Provincial Government	67.4	44.3	50.9	58.1	50.4	68.8	63.8	54.3	30.2
Municipal Government	50.5	38.3	25	26.4	23.3	25	36.2	30.7	27
Private individuals, philanthropists, donors	48.4	47	47.2	46.5	42.7	37.5	46.8	45.6	32.3
Bank	7.4	7.8	4.6	6.2	5.2	6.3	2.1	5.8	3.9
Corporations/Private businesses	36.8	28.7	30.6	35.7	19.4	18.8	29.8	28.2	22.4
Parent organization	7.4	7	13.9	4.7	5.2	18.8	12.8	7.7	4.4
Credit Union	2.1	21.7	14.8	7.8	1.7	6.3	0	7.8	2.3
Community futures	3.2	2.6	7.4	0	3.9	0	4.3	3.4	3.2
No grants/donations	13.7	18.3	16.7	17.8	28	25	12.8	20.2	34.4
Purposes of grants and donations received in 2013/4:									
Training and technical assistance grants	21.1	15.7	23.1	24.8	22.8	18.8	19.1	21.6	38.2
Operational grants	73.7	62.6	68.5	66.7	63.8	62.5	80.9	67.1	75.4
Governance and management	10.5	13	7.4	11.6	6.5	12.5	19.1	10	9.5

	Surveys conducted in 2014								2015
	AB	BC	MB	NB	NS	PE *	TR **	All 2014	ON ***
Research and development	13.7	13.9	15.7	16.3	10.3	0	23.4	13.7	24.9
Capital project	38.9	25.2	32.4	15.5	15.5	25	31.9	23.7	33
Sources of loans/ debt instruments taken out in 2013/4									
Foundations	2.1	0	1.9	0	0.4	0	0	0.7	1.8
Federal Government	1.1	0	0.9	1.6	0	0	0	0.5	2.3
Provincial Government	1.1	1.7	2.8	3.1	0.9	0	0	1.6	0.9
Municipal Government	3.2	0.9	0	0.8	0.4	0	2.1	0.9	1.8
Private individuals, philanthropists, donors	1.1	0.9	9.3	3.9	1.3	6.3	2.1	3	2.3
Bank	10.5	6.1	4.6	9.3	7.8	12.5	8.5	7.8	8.8
Corporations/Private businesses	0	0.9	7.4	0.8	0.4	0	2.1	1.6	2.5
Parent organization	2.1	3.5	2.8	0.8	0	0	2.1	1.5	0.7
Credit Union	1.1	4.3	15.7	13.2	2.2	31.3	0	6.7	5.5
Community futures	1.1	0.9	0.9	0.8	1.3	0	2.1	1.1	0.5
No loans / debt instruments	73.7	73.9	64.8	63.6	80.6	50	85.1	73	74.9
Purposes of loans/ debt instruments taken out in 2013/4:									
Training and technical assistance Loans	0	0.9	0	2.3	0.4	0	0	0.7	1.8
Operational Loans	8.4	10.4	21.3	17.8	5.6	18.8	6.4	11.5	36
Governance and management	0	0.9	0	1.6	0.4	0	2.1	0.7	1.8
Research and development	1.1	0.9	1.9	0.8	0.9	0	2.1	1.1	2.6
Capital project	9.5	7.8	16.7	9.3	7.8	25	10.6	10.1	41.2
Sector of products and services sold									
Resources, production, construction	16.8	25.6	26.1	27.9	19.8	25	23.4	23	26
Trade, finance	13.9	24.8	27.9	17.1	12.9	43.8	17	18.8	36.2
Real estate	8.9	14	18	13.2	5.2	6.3	10.6	10.7	33.1
Accommodation, food, tourism	60.4	43.8	45	33.3	32.8	56.3	61.7	42.4	34.5
Health and social services	18.8	24	15.3	37.2	37.1	18.8	31.9	28.7	16.2
Art, culture, communication	35.6	36.4	45.9	27.9	23.3	31.3	44.7	32.6	28
Other services	15.8	19.8	15.3	17.1	14.2	18.8	27.7	16.9	30.4
Active in two or more sectors (above)	46.3	58.7	54.4	54.5	37.7	53.8	68.3	49.4	56.6
Focus ****									
Employment	30.7	50.4	45	50.4	34.1	50	40.4	41.3	39.8
Poverty	42.6	61.2	57.7	62	36.2	56.3	63.8	50.7	59.2
Disability	25.7	43	30.6	38	31.5	31.3	25.5	33.2	33.7
Mission *****									
Social, environmental, culture-focused	67.3	54.5	51.4	55.8	64.7	25	63.8	59	58.7
Income-focused	9.9	11.6	12.6	14	3.9	43.8	10.6	10.2	15.8
Multi-purpose	22.8	33.9	36	30.2	31.5	31.3	25.5	30.8	25.6

Appendix M: Social Enterprise Resources & Publications

Organizations & Programs (Ontario & Canada):

- ▶ Canadian Alternative Investment Cooperative
<http://www.caic.ca/apply.html>
- ▶ Canadian Centre for Community Renewal
<http://communityrenewal.ca/enterprise-development>
- ▶ Canadian Community Economic Development Network - Ontario Office
http://ccednet-rcdec.ca/en/regional_networks/ontario
- ▶ Linking Infrastructure And Investment for Social enterprise in Ontario
https://ccednet-rcdec.ca/en/regional_networks/ontario/liaison
- ▶ Canadian Social Entrepreneurship Foundation
<http://www.csef.ca/>
- ▶ Carleton Centre for Community Innovation
<http://carleton.ca/3ci/>
- ▶ Centre for Innovative Social Enterprise Development
<http://www.cised.ca/>
- ▶ Centre for Social Innovation
<http://socialinnovation.ca/>
- ▶ Ontario Catapult Microloan Fund for Social Ventures
<http://socialinnovation.ca/catapult>
- ▶ Community Futures Development Corporations
<http://www.oacfdc.com/>
- ▶ Community Innovation Lab
<http://www.communityilab.ca/>
- ▶ Community Opportunity and Innovation Network
<http://coin-ced.org/>
- ▶ Conseil de la coopération de l'Ontario (CCO)
<http://www.cco.coop/fr/>
- ▶ Entreprise collective – sociale – économie
<http://entreprisesociale.ca/>
- ▶ Enterprising Non-Profits
<http://www.socialenterprisecanada.ca/en>
- ▶ Innoweave
<http://innoweave.ca/>
- ▶ MaRS Centre for Impact Investing
<http://impactinvesting.marsdd.com/>
- ▶ MaRS Social Innovation Generation
<http://www.sigeneration.ca/>
- ▶ Mowat Centre for Policy Innovation
<http://mowatcentre.ca/>
- ▶ J.W. McConnell Family Foundation Social Innovation Fund
<http://www.mcconnellfoundation.ca/assets/PDFs/SIF%20Information%20Guide.pdf>
- ▶ Ontario Centres of Excellence
- ▶ Ontario Social Impact Voucher
<http://www.oce-ontario.org/programs/entrepreneurship-programs/osiv-pilot-program>
- ▶ Ontario Co-Operative Association (On Co-op)
<http://www.ontario.coop/>
- ▶ Ontario Federation of Indigenous Friendship Centres
<http://www.ofifc.org/about-us/general-information/social-enterprise>
- ▶ Ontario Network of Entrepreneurs
<http://www.onebusiness.ca/>

- ▶ Ontario Nonprofit Network
<http://theonnn.ca/>
- ▶ Ontario Social Economy Roundtable
<http://seontario.org/home/about-social-enterprise-ontario/strengthening-the-social-economy-in-ontario/>
- ▶ PARO Centre for Women's Enterprise
<http://paro.ca/2013/>
- ▶ Pillar Nonprofit Network: Social Enterprise Program
<http://www.pillarnonprofit.ca/>
- ▶ Rural Social Enterprise Constellation
<http://theonnn.ca/ruralsocialenterpriseconstellation/>
- ▶ School for Social Entrepreneurs
<https://www.the-sse.ca/>
- ▶ Social Economy Centre at University of Toronto
<http://socialeconomycentre.ca/>
- ▶ Social Entrepreneurship Evolution
<http://www.nordikinstitute.com/archives/project/seevolutiones>
- ▶ Social Enterprise Northern Ontario
<http://paro.ca/2013/paro-services/social-enterprises-northern-ontario-seno/>
- ▶ Social Enterprise Ontario
<http://seontario.org/>
- ▶ Social Enterprise Toronto
<http://socialenterprisetoronto.com/>
- ▶ Social Return on Investment Canada
<http://www.sroi-canada.ca/>
- ▶ Social Venture Exchange (SVX)
<https://svx.ca/en>
- ▶ SoJo
<http://mysojo.co/>
- ▶ Toronto Enterprise Fund
<http://www.torontoenterprisefund.ca/>
- ▶ Trico Charitable Foundation
<http://tricofoundation.ca/capacity-building/>
- ▶ Youth Social Innovation Capital Fund
<http://www.youthsocialinnovation.org/for-si/apply-now/>
- ▶ Waubetek
<http://www.waubetek.com/default.aspx>

Recent Publications (Ontario & Canada):

- ▶ A Policy Blueprint for Strengthening Social Enterprise in the Province of Ontario: Ontario Nonprofit Network, 2014
<http://theonnn.ca/wp-content/uploads/2014/10/ONN-Policy-Blueprint-for-Social-Enterprise.pdf>
- ▶ Partnerships Between Not-for-Profit Organizations and Business: Challenges and Opportunities: Carleton Centre for Community Innovation, 2014
<http://carleton.ca/3ci/wp-content/uploads/R-14-02.pdf>
- ▶ The New Regulatory Regime for Social Enterprise in Canada: Potential Impacts on Nonprofit Growth and Sustainability: AFP Foundation for Philanthropy Canada, 2014
http://www.sess.ca/english/wp-content/uploads/2014/10/OConnor-Social-EnterpriseRegRegime.FINAL_.2014.pdf

- ▶ Mobilizing Private Capital for Public Good: Priorities for Canada: Canada's National Advisory Board to the Social Impact Investment Taskforce & MaRS Centre for Impact Investing, 2014
http://www.socialimpactinvestment.org/reports/MaRS-National_Advisory_Board_Report_EN.pdf
- ▶ Mapping Social Enterprises in Ontario: A Report to the Province: Pillar Nonprofit Network, 2014
https://www.dropbox.com/s/rb0g-3fuhrcyvd38/Mapping%20SE%20in%20Ontario_Community%20REPORT.pdf
- ▶ From Investment to Impact: the NFP Experience with Social Impact Bonds: Mowat Centre, 2014
http://mowatcentre.ca/wp-content/uploads/publications/93_from_investment_to_impact.pdf
- ▶ Dual Purpose Corporate Structure Legislation: Stakeholder Engagement Report: Deloitte Social Enterprise Panel, 2014
<http://www.ontariocanada.com/registry/showAttachment.do?postingId=17642&attachmentId=26891>
- ▶ Inspiring Innovation: The Size, Scope and Socioeconomic Impact of Nonprofit Social Enterprise in Ontario: Canadian Community Economic Development Network, 2013
http://www.sess.ca/english/wp-content/uploads/2013/09/InspiringInnovation_CCEDnet_web.pdf
- ▶ The Social Enterprise Opportunity for Ontario: Mowat Centre's Non-for-Profit Research Hub, 2013
http://mowatcentre.ca/wp-content/uploads/publications/67_the_social_enterprise_opportunity.pdf
- ▶ Investing for Impact: How Social Entrepreneurship is Redefining the Meaning of Return: Credit Suisse and the Schwab Foundation for Social Entrepreneurship, 2012
http://www.weforum.org/pdf/schwabfound/Investing_for_Impact.pdf
- ▶ Social Finance Census 2010: Ontario Non-profit Network & SVX, 2010
<http://theonnn.ca/wp-content/uploads/2012/02/sfcensus2010summary.pdf>
- ▶ Canadian Social Enterprise Guide: Entprising Nonprofits, 2010
<http://www.socialenterprisecanada.ca/en/learn/nav/canadiansocialenterpriseguide.html>

Government of Ontario Publications:

- ▶ Impact: A Social Enterprise Strategy for Ontario: 2013
<http://www.ontario.ca/document/impact-social-enterprise-strategy-ontario>
- ▶ The Partnership Project: An Ontario Government Strategy to Create a Stronger Partnership with the Not-For-Profit Sector: 2011
http://www.citizenship.gov.on.ca/english/pp/docs/partnership_project_report.pdf
- ▶ Ontario's Social Innovation Policy Paper: 2011
<http://www.marsdd.com/wp-content/uploads/2012/10/Wiki-Social-Innovation-Policy-Paper-.pdf>

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