

Measuring the Size, Scope & Scale of the Social Enterprise Sector in Manitoba

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ABSTRACT

This project surveyed social enterprises in Manitoba during the spring and summer of 2011 to develop clear indicators of their size, market activities, and socio-economic contributions. In this study, a social enterprise is defined as a business venture, owned or operated by a non-profit organization that sells goods or provides services in the market to create a blended return on investment; financial, social, environmental, and cultural. Using this definition, researchers identified 266 operating social enterprises in Manitoba. Of the 266 social enterprises that received the survey, 118 responded. Indicators of socio-economic contribution included sales and revenue, expenditures, employment, volunteer engagement, and clients served and trained. Respondents were asked to report results of the 2010 financial year. The following report is a summary of the survey findings.

Prior to revealing the survey findings, this paper provides a brief history of the innovative approaches to community economic development that have been used in Manitoba. The province's roots in community-based economic models laid the foundation for Manitoba's current social enterprises, which are found to be a diverse sector, composed of businesses meeting a range of poverty reduction, social, cultural or environmental goals. The survey results suggest that in 2010, the 118 responding social enterprises generated at least \$55.4 million in cumulative revenue, including at least \$41.5 million generated through sales. Responding social enterprises paid at least \$25.3 million in salaries and wages to 3,752 people, of whom 3,450 were employed as part of the mission of the organization. We estimate that Manitoba social enterprises paid, on average, just over \$20,000 in wages and salary per full-time equivalent employee. Additionally, social enterprises trained 6,890 individuals, generated 5,870 volunteer opportunities, and provided services to an average of 4,200 people. This paper builds a strong case for stakeholders, community, funder, and government, to collaboratively value these distinct contributions and to support hospitable environments for social enterprises.

This report is but the first of what is hoped to be a bi-annual profile of social enterprises in Manitoba. As such, this report reveals some intriguing findings and other questions that will be addressed over time.

“Social entrepreneurs are not content just to give a fish or teach how to fish. They will not rest until they have revolutionized the fishing industry.”

- Bill Drayton, Founder of Ashoka

INTRODUCTION

Market crashes, mounting global debt, and a concerning lack of accountability, have many people reconsidering how our economies and enterprises are organized. An ever-deepening chasm between the rich and poor, the erosion of good jobs, and a growing consciousness for environmental sustainability, it might be argued, has led to a tipping point in the lifespan of current economic structures. An alternative business model has been thriving in our market economy for decades, however, helping to address the underlying causes of these economic challenges. Social enterprises have existed in a variety of forms for decades, but are rapidly gaining recognition in the public consciousness as a viable and competitive business model. Goods and services are provided while fulfilling social, cultural, environmental or economic goals. Despite its growing popularity, the concept of social enterprise remains largely undervalued, misunderstood, and commonly overlooked.

To bridge this knowledge gap, the research is focused on measuring the size, scope, and scale of the social enterprise sector in Manitoba. The benefits are three-fold. Firstly, the statistics in this report will demonstrate the strength of the sector and thereby improve public, private, and government appreciation for the social, economic, and cultural contributions of social enterprises in Manitoba. Secondly, this report will contribute to a deeper understanding of the sector. The results not only illuminate the challenges social enterprises face, but also the opportunities they represent. This requires a closer examination of the social, economic, environmental and cultural objectives of the sector. Lastly, we approached this project as an important opportunity to engage the social enterprise sector.

Indeed, this project served as an introduction to the concept of social enterprise for some individuals and organizations, previously unaware that their business model reflected a much larger community of social enterprises. By improving collective awareness, it is hoped this research will encourage more social enterprises to engage with the broader social enterprise community. As an ancillary benefit many social enterprises became aware of organizations

working to support the sector, such as our research partners and the members and collaborators with the Canadian CED Network (CCEDNet).

To avoid debates of definition and a duplication of previous research efforts, this project uses a clear, but relatively narrow definition of the social enterprise to support the collection of a sample from a sample frame (list) conforming to a well-defined population. Each social enterprise contacted for the research met the following criteria:

- Incorporated as a non-profit business or wholly owned by non-profit organizations;
- Participates in the market economy by selling goods or services;
- Engages in ongoing market activities for primarily a social, cultural, and/or environmental mission.

Despite this concrete definition, our sample list was inevitably modified by subjective decisions and empirical limitations. Firstly, non-profit daycares, non-profit housing and museums were excluded from the survey data due to limited resources and to maintain consistency with similar projects across the country. Secondly, for-profit co-operatives and credit unions were excluded because their economic, social, and cultural benefits are enjoyed primarily by members of the co-operative, not by the broader community. Although for-profit co-operatives and credit unions represent an integral part of Manitoba's social economy tradition, they were also excluded to focus the scope of the current project. Sufficient research and reliable data is readily available for these sectors. Thirdly, privately-owned enterprises that generate broader social, cultural, and/or environmental advantages (e.g., through corporate social responsibility) were excluded from the sample list. Similarly, non-profit businesses owned by municipal or First Nations' governments were also excluded. Fourthly, events-based businesses, operated by non-profit organizations (e.g., music/film festivals), were excluded due to the short-term nature of their market activity.

Project Objectives and Limitations:

To quantify the value and long-term contributions social enterprises bring to Manitoba communities is a daunting task. The following examples illustrate this difficulty. How does one capture the full and long-term social, economic and environmental benefits of a construction company that helps former gang members become community role models. The company hires and trains them to retrofit low-income housing for energy efficiency, thus reducing the costs of crime and the carbon footprint while rebuilding families. How does one account for the economic activity generated by a rural farmers' market? Dozens of consumers are drawn to a community, which helps to sustain the local tourism industry and ensure the self-sufficiency of local food producers. What is the value of volunteer hours invested in a social enterprise that assists newcomers establish a business and adapt to new surroundings?

Evidence-based research is needed to establish the extent to which social enterprises contribute to the economy; create employment (especially in marginalized communities) and create social value. A calculation of the contributions of social enterprises to society, presented to the general public, non-profit organizations, funding organizations, government policy makers and politicians, and the private sector will help to foster relationships, resources and partnerships for a supportive environment to impact social enterprise growth.

This project is intended to serve as a starting point from which these complex questions can be considered. Social enterprises were surveyed in Manitoba in the spring and summer of 2011. The goal was to develop clear indicators of their nature, scope and socio-economic contribution. Indicators of socio-economic contribution included sales and revenue, expenditures, employment, volunteer engagement, and clients served and trained.

In the findings of the survey, this report seeks to:

- Estimate the immediate impact of social enterprises on Manitoba's economy and communities;
- Update our understanding of the scale and scope of social enterprises;
- Understand what they do, where they do it and why;
- Provide a baseline for future surveys that seek to monitor the development of the sector in Manitoba over time;
- Utilize an established methodology for measuring the social enterprise sector in order to contribute to a nation-wide portrait of social enterprises in Canada.

A key piece of the research is to demonstrate the value of social enterprises in meeting community needs and in creating desirable social, economic and environmental change. A constant challenge for those operating in, or investing in, the social enterprise sector is accessing the resources or the methodology to fully assess their value. However, in order for the sector to grow, more people must become aware of the benefits of supporting social enterprises through increased purchasing, leveraging investment, and creating enabling policy. Therefore, this study is also intended to educate policy makers and the general public of the value in supporting Manitoba's social enterprise sector.

This study is part of a larger pan-Canadian effort to illustrate the impact of social enterprises on our nation's economy and communities. No definitive research to date has measured the size, scope, and benefit of social enterprises in Canada, but the Canada Revenue Agency (CRA) has examined the market activities of charities. According to the CRA, 43,795 charitable organizations reported \$27.9 billion of income generated through market-driven activities in 2002. The *Canadian Social Enterprise Guide* puts this figure into context by pointing out that

these social enterprises accounted for 2.8% of the Canadian gross domestic product in 2002¹. These numbers offer a sense of the size of the social enterprise sector, but it is important to illustrate the deeper significance of social enterprises by calculating the myriad ways in which these market activities have benefitted people and communities across Manitoba. Therefore, this report will examine the larger social and economic environment in which Manitoba's social enterprise sector has grown and continues to thrive.

The purpose of this research is to provide a detailed picture of the social enterprise sector in Manitoba. Despite our best efforts to survey as many social enterprises as possible, we cannot claim to be all-knowing of the province's social enterprise sector. As such, the results of the survey are reported with caution. One hundred and eighteen respondents represent a response rate of nearly fifty percent. The locations of the non-responsive social enterprises are known as is a general awareness of their business activities. However, we cannot say with certainty that the respondents represent less or more than 50 percent of the employment, revenues or profits of the social enterprise community as a whole based on current available information. We also recognize Manitoba's social enterprise sector is much larger and more varied than our snapshot of the sector captured. Nevertheless, we are able to state with confidence this research has revealed a general profile of Manitoba's deep and complex social enterprise sector.

¹ Enterprising Non-Profits, *The Canadian Guide to Social Enterprise* (Vancouver: 2010), 4

DATA NOTES & METHODOLOGY

Given the objectives of the study, to generate widely intelligible quantitative indicators of the impact of social enterprise activity in Manitoba (MB), we opted for a sample survey method using a short and highly standardized questionnaire designed for easy completion and return to maximize the response rate.

Creating the Catalogue:

Best efforts were made to create a sample frame that included all social enterprises in Manitoba, and to collect data from a representative sample of this population. The research team used the networks and relationships available to the Canadian CED Network (CCEDNet) to identify social enterprises. Sources used to identify verifiable or potential social enterprises include:

- Various online sources (e.g. the Manitoba Arts Network, the Farmers' Market Association of Manitoba)
- Individuals knowledgeable about the social enterprise sector (e.g. Manitoba Co-operative Association, several local economic development organizations)

From these references and contacts a preliminary dataset was produced of over 800 organizations and potential social enterprises. The master list was subsequently categorized for a manageable and efficient tracking process. The categories were: arts and culture; thrift/second hand stores; farmers' markets; non-profit co-operatives; museums; housing; day care; and miscellaneous. The miscellaneous grouping comprised sub-categories too small to provide meaningful statistics on their own.

Separating the social enterprise into these categories allowed researchers to identify key contacts who were often able to provide comprehensive lists in their respective category. For example, the Farmers' Market Association of Manitoba was consulted for a comprehensive list of farmers' markets. Similarly, the Manitoba Arts Network helped provide a comprehensive list of every gallery, theatre, and arts/culture-based organization in Manitoba. To respect the confidentiality of certain organizations, only the names of the organization was provided by our outside sources. As previously mentioned, internet searches bridged the gap in these cases.

The master list grew rapidly. It quickly became apparent every sub-category of social enterprise could not be included. Due to limited resources and time, day cares, housing, and museums were excluded from the study, although these groups may be included in future surveys. Consistency was also an important factor in eliminating these categories, as day cares, housing, and museums were not included in the Alberta and British Columbia study. The final sample set recorded 373 social enterprises. Of this sampling, researchers were able to contact 266 confirmed social enterprises.

The final sample set, although not exhaustive, does represent the diversity of the sector and provides robust data not available in previous studies of the social enterprise sector in Manitoba.

Process:

The sample set, predictably, was a work in progress. As researchers began contacting and surveying, it was discovered several organizations did not fit our criteria. A total of 51 social enterprises were voided and eliminated from a working list of nearly 400. The reasons varied, but most of the disqualified organizations were revealed to be for-profit or were no longer in business. The greatest percentage of voided entries occurred in the co-operative category. The poor response rate reflected the inadvertent inclusion of a large number of for-profit co-operatives, inconsistent with our definition of social enterprise. As a result, the remaining eligible co-operatives were added to our miscellaneous list.

Potential respondents were further screened, verbally and including the following text on page one of the questionnaire, to determine active operation as a social enterprise:

“This is a survey of social enterprises in Manitoba. 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.”

This resulted in 266 confirmed social enterprises. The field work occurred over a six week period, between June 1 and July 15, 2011.

Table 1: Survey response

Preliminary dataset of potential social enterprises		373
1 = Not contactable (following several tries)	29	
2 = Contacted, not a social enterprise	51	
2.5 = No response (after follow-up calls and send questionnaire cold)	27	
Confirmed list of social enterprise organizations		266
3 = Contacted, refused to participate	10	
4 = Contacted, sent a questionnaire but did not respond	138	
5 = Responded	118	118
Net response rate		44.3%

Questionnaire:

The questionnaire was developed and piloted by students of Peter Hall in the Spring 2009 course, SCD 403 (Leadership in Sustainable Community Development), at Simon Fraser University in British Columbia. The questionnaire was further refined in the 2010 British Columbia and Alberta social enterprise survey and by the research team to address issues raised in the student survey (e.g. legal structure was clarified; set of sector definitions was expanded), to ensure comparability between this survey and data from the mapping survey (e.g. geographic area of operation) and to also address newly-identified specific needs (e.g. sources and uses of grant financing). However, the basic structure and length of the tested and proven questionnaire was retained. (See Appendix E for the complete questionnaire.) We have subsequently encouraged other social enterprise surveyors to utilize these same data fields to facilitate comparative research.

Data Treatment and Management:

Data entry spreadsheets and guidelines were established for student research assistants prior to conducting/receiving interviews. 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.

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 employee and 0.25 per seasonal employee was calculated. Missing data were represented as zero in the database for this calculation.

Although it would be inaccurate to refer to profitability for many social enterprises, Profit was calculated as revenue minus expense. The Profit calculation allowed identification of social enterprises that 'broke even' (i.e., showed a profit of zero or more during the 2010 financial year).

Outliers:

Considerable variation existed in levels of employment, financial indicators and the number of people in targeted groups that were trained, employed and served. We excluded numbers for membership and people served in the cultural sector social enterprises (which identified customers/business clients/patrons) as potentially misleading.

A BRIEF HISTORY OF THE SOCIAL ECONOMY IN MANITOBA

To appreciate the current social enterprise community in Manitoba, it is important to trace the roots of the broader social economy and acknowledge its rich history in the province. According to the B.C.-Alberta Social Economy Research Alliance (BALTA), the social economy comprises “enterprises that are animated by the principle of reciprocity for the pursuit of mutual economic or social goals, often through social control of capital.” The social enterprise sector is included in this definition, but the definition also encompasses a broader collection of business models not included in our survey, such as co-operatives and credit unions, non-profit and volunteer organizations, charities and foundations, service associations and community enterprises. We refer to the social economy in this section to demonstrate the diverse enterprises and organizations that have shaped and influenced the social enterprise sector of current-day Manitoba.

Communities in Manitoba have a strong, long-standing tradition of working together to bolster local economies, improve social conditions, and generate equality. Social enterprises have historically provided a means for many communities to spur holistic development and address social, environmental, economic, and cultural challenges. Although the concept of social economy has only recently reached a wide audience, the local history of this alternative business model is older than the province itself.²

This section offers only a succinct summary of the evolution of the social economy in Manitoba. It is a subject that presents opportunities for future research. It is also necessary to point out that not every sub-sector of the social economy discussed in this section is included in our research sample. Band-owned enterprises and for-profit co-operatives, for example, while recognized for their contributions to Manitoba’s social economy, were not participants in this study because they do not qualify under our working definition of social enterprise. Non-profit daycares and non-profit housing also fill the criteria of our social enterprise definition but were not invited to participate in our survey due to a lack of time and resources. The Data Notes and Methodology section of this report provide an explanation for their exclusion. The roots of Manitoba’s social economy can be traced as far back as the First Peoples. The first inhabitants of the prairies embedded strong community-oriented and environmental values into their economies and cultures. Understandably, cooperation was synonymous with survival, but the concept of sharing, mutually beneficial trade and respect for the natural environment left an indelible mark on modern economies, communities and environment.³

² Although the following historical sketch of Manitoba’s social economy history is not exhaustive, it highlights some significant components of the province’s social enterprise history.

³ Macpherson, Ian. (2010, October). *Cultivating Co-operation: Roots Run Deep*. Speech presented at the 2010 Manitoba Community Development/Community Economic Development Gathering, Winnipeg, MB.

The history of Manitoba's labour movement, early in the 20th Century, also points to a deep-seated tradition of organizing for a more equitable and community-oriented economy. Pro-labour activities in the province, culminating with the infamous Winnipeg General Strike of 1919, were premised on the belief that economies can, and should, benefit everyone, not just a minority of shareholders and business owners.

Co-operatives have also played a significant role in Manitoba. The practice of using trade and commerce to benefit entire communities has continued since the 19th Century. The rural co-operative movement in Manitoba initiated a diverse wave of businesses and industries to better serve community members and create local jobs. These diverse co-operatives reflected the province's regional makeup and urban and rural needs. For example, between 1928 and 1992, the Workers and Farmers Co-operative Association established several businesses including the retailing of milk, lumber, fuel, recycling and auto repair. This member-owned co-operative engaged in market activities while also pursuing social, political, cultural and educational mandates.⁴ Co-operative enterprises continue to create jobs, enhance local democratic ownership, and provide essential services in many of Manitoba's communities. Manitoba is currently home to 410 co-operatives with assets exceeding \$189 billion and a membership of 800,000.

The credit union movement represents another facet of social economy history in Manitoba. It dates back to 1937 with the establishment of the first *caisse populaire* (credit union) in St. Malo. This *caisse populaire*, and the many credit unions that opened in the following decades, helped to sustain the economic and cultural vitality of Manitoba's rural communities. In many cases, credit unions represented a steady presence in communities when mainstream financial institutions fled rural and/or economically depressed neighbourhoods. To this day, credit unions remain the only financial institution providing financial services to residents, producers, and business people in 65 Manitoba communities.⁵ Credit unions are now found in urban and rural communities in Manitoba. The province still has seven Francophone *caisses populaires* representing 30,000 members with assets exceeding \$600 million. The credit union system in Manitoba has claimed steady growth and now includes 57 credit unions, currently more than 525,000 members⁶, and pays \$150 million in wages to 3,500 employees. These credit unions operate 186 branches in Manitoba (double the total of other financial institutions in the

⁴ Loxley, J., & Simpson, D.. *Government policies towards community economic development and the social economy in Quebec and Manitoba*. Saskatoon: (2007), 20 .

⁵ Manitoba's Credit Unions. (n.d.). *About Credit Unions*. Retrieved from <http://www.creditunion.mb.ca/about/index.htm>

⁶ Loxley, & Simpson. *Government policies towards community economic development and the social economy in Quebec and Manitoba*, 21.

province) and hold combined assets of \$18.3 billion⁷. The community development orientation of early credit unions is perhaps best embodied in one of Manitoba's largest credit unions, Assiniboine Credit Union (ACU). ACU has become a national leader in employing community economic development principles and adopting progressive employment and environmental policies.

Despite the significant contributions to Manitoba's economy of co-operatives and credit unions neither of these sectors were included in our survey process. They are only mentioned here to elucidate Manitoba's broader history of supporting alternative economic structures and market institutions, thus leading to a relatively supportive environment for current social enterprises.

Other pioneers of the social enterprise movement include early non-profit organizations such as the YM-YWCA, who created businesses to generate sustainable revenues to support free community programs. The Salvation Army opened thrift stores in 1908 to support their social justice work in Canadian cities. Canadian Goodwill Industries adopted a similar business model in 1931, with the opening of second-hand thrift shops in Manitoba. They continue to offer affordable goods while providing rehabilitation services, training and employment opportunities for individuals experiencing barriers to employment.

Business sectors are in a constant state of evolution. So too is the social enterprise sector. Social enterprises have flourished in different market segments at different times. For example, Manitoba's daycare sector has been dominated by non-profit organizations for decades. These non-profit businesses have helped improve the accessibility and affordability of reliable childcare services for all Manitoba families. Manitoba's non-profit housing sector has also succeeded where other business models have failed to provide affordable and accessible housing. By operating within a market-based environment, co-operative and supportive housing organizations have found financial sustainability while fulfilling their mandates to provide accessible shelter. Similarly, various Manitoban museums and arts-based institutions such as the Royal Winnipeg Ballet, the Mennonite Heritage Village, and the St. Norbert Arts Centre have helped preserve the history of Manitoba and celebrate diverse cultures with a non-profit business model. Many social enterprises are found in numerous market sectors, including fitness centres, farmers' markets, radio stations and recycling depots. The scope of this project can only reveal a small portion of this diversity, but the following sections will examine more closely the market activities of social enterprises in Manitoba.

The current social enterprise movement continues these traditions by prioritizing cooperation, participation and service to the community. Although various sectors and models have

⁷ Manitoba's Credit Unions. (n.d.). *About Credit Unions*.

emerged to meet community, economic and environmental needs based on these values, there remains no legal criteria to precisely establish who, or what, is a social enterprise. As our brief history suggests, the social enterprise sector owes its foundation to a wide array of organizations, movements, and community actors. The following section examines the policies, organizations and communities that have helped sustain a robust social enterprise in Manitoba to this day.⁸

⁸ It is not the intent of this paper to compartmentalize or define the social enterprise sector. Of note, not all organizations mentioned above were included in this project. Due to limited time and resources, and for the sake of consistency, we limited our survey sample to social enterprises operated by non-profit organizations and/or non-profit co-operatives.

THE CURRENT STATE OF SOCIAL ENTERPRISES IN MANITOBA

Existing social enterprise research from around the world suggests the social enterprise sector of each country, province/state and city has unique characteristics. Social enterprises do not exist in a vacuum. Rather, their success or failure hinges on the social needs and market opportunities around them, as well as the support of respective government, business, and community environments. This section explains the government, community and financial supports available to Manitoba's social enterprise sector.

Government Support:

The Manitoba government has strengthened the social enterprise sector by implementing progressive legislation and by removing certain financial barriers to social enterprise development. Non-profit childcare centres, for example, have enjoyed the support of the provincial government since the implementation of the Provincial Day Care Program in 1974. Since then, a series of federal and provincial operating funds, low-income family subsidies, and salary enhancement grants have been provided to non-profit daycares.⁹ Similar sectoral supports have reinforced the work of non-profit co-operatives, museums, arts and culture enterprises, non-profit housing, farmers' markets and other industry sectors where social enterprises thrive.

In 2011, Manitoba introduced the Neighbourhoods Alive! Tax Credit to encourage social enterprise development. The tax credit offers a non-refundable 30% corporate income tax credit to corporations who partner in a social enterprise with charitable organizations in Manitoba to support job creation for people with barriers to employment.¹⁰ The province has also established support for social enterprises in its daily operations. It has adopted social enterprise procurement initiatives and has signed on to the Winnipeg Social Purchasing Portal, explained in detail below.

Through the Winnipeg Partnership Agreement, the provincial, federal, and municipal governments provided millions of dollars in non-repayable funding support to community

⁹ Canadian Union of Public Employees. (2009, Oct.). *A great place to grow - public child care*. Retrieved from http://cupe.ca/updir/Child_Care_Profile_-_Manitoba.pdf

¹⁰ Province of Manitoba. (n.d.). *Corporate tax credits: Neighbourhoods Alive! Tax Credit*. Retrieved from <http://www.gov.mb.ca/finance/ccredits.html>

development projects between 2004 and 2010. Several of these projects included support for expanding and strengthening social enterprises in Winnipeg's inner city¹¹.

Community Support:

In addition to this enabling political environment, social enterprises in Manitoba have benefitted from the support of diverse organizations across the province. The Canadian Community Economic Development Network (CCEDNet) - Manitoba has been a catalyst for creating a supportive political environment. Governments have been educated regarding the advantages of policies that encourage the sustainability and growth of social enterprises. CCEDNet - Manitoba worked closely with the provincial government to create the Neighbourhoods Alive! Tax Credit, explored ethical and progressive procurement policies, and ensured supportive business development tools and services are accessible to all social enterprises. CCEDNet - Manitoba also promotes the successes and potential of social enterprises to the general public. It has successfully nominated social enterprises for public awards and provides capacity-building opportunities through learning events and workshops to both new and established social enterprises. CCEDNet - Manitoba's research activities engage the social enterprise sector through consultation to identify needs, challenges and potential for growth. Since 2005, CCEDNet - Manitoba's Spark Service (formerly known as CEDTAS) has been offering practical support in the form of free organizational assessments and resource referrals to social enterprises in Winnipeg. Spark also arranges connections between community organizations with volunteers who have specialized skills to match the need.

During the past fifteen years, SEED (Supporting Employment and Economic Development) Winnipeg Inc. has emerged as a leader among community-based organizations in providing social enterprise development services and support. SEED Winnipeg was established in the early 1990s as an independent, non-profit agency "designed to combat poverty and promote inner-city renewal through micro and community enterprise development for low income people."¹² SEED Winnipeg has pursued this mandate through business development and promotion of local social enterprises and worker co-operatives.

Since 1994, Local Investment Towards Employment (LITE) has been a champion for social enterprises. LITE has conducted public awareness and education campaigns and programs, and raised community funds to catalyze new social enterprise opportunities. In 2011, LITE adopted the Winnipeg Social Purchasing Portal, first established by SEED Winnipeg. It connects individual and institutional purchasers with social enterprises across the city through an online

¹¹ Wuttune, W., Rothney, R., & Gray, L. *Financing Social Enterprise: a scan of financing providers in the Manitoba, Saskatchewan and northwestern Ontario region*. (2008: Saskatoon), 30.

¹² Loxley, & Simpson. *Government policies towards community economic development and the social economy in Quebec and Manitoba*, 24.

database. Marketing and growth opportunities are provided for small local businesses committed to strengthening employment opportunities and stimulating community economic development.

Community Ownership Solutions (COS) was created ten years ago for the sole purpose of creating employment opportunities through social enterprises and building momentum for the concept in Manitoba. Although COS succeeded in establishing several social enterprises, one business proved to be more sustainable than the others, and has since become a marquee example of a successful social enterprise. Inner City Renovations (ICR) has not only succeeded, but has thrived in the competitive construction industry. The profitable ICR is engaged in residential and commercial construction projects while providing meaningful jobs and training opportunities to dozens of people with barriers to employment.

Community Development Corporations (CDC) and Community Futures Development Corporations (CFDC)¹³, established by the provincial and federal governments, respectively, have also been available to support the growth of a social economy in rural Manitoba. Both CDCs and CFDCs are primarily tasked with business and economic development in their regions. However, they are also mandated to “work with communities to assess local problems, establish objectives, and plan and implement strategies to develop human, institutional and physical infrastructure, entrepreneurship, employment, and the economy.”¹⁴

Numerous sectoral associations and organizations provide development support and assistance to social enterprises. Organizations such as the Manitoba Co-operative Association, the Farmers Market Association of Manitoba, the Manitoba Arts Council, the Manitoba Child Care Association, and many others, offer important support for social enterprises in their respective sectors.

Financial Support:

The support of government and community organizations are valuable, but adequate funds and access to financing are essential for the start-up and the long-term success of any social enterprise. Several organizations in Manitoba have developed a variety of funding programs to provide financial resources to social enterprises facing barriers to growth or development. The United Way of Winnipeg has demonstrated support for social enterprises by actively seeking opportunities to discover and support the social enterprise sector in Winnipeg. This commitment to social enterprises is entrenched in the United Way’s Social Enterprise Policy

¹³ According to the Government of Manitoba, the core role of CFDCs are to: “foster entrepreneurial development by providing both financial and technical support to new and existing small businesses in non-metropolitan communities.”

¹⁴ Loxley, & Simpson. *Government policies towards community economic development and the social economy in Quebec and Manitoba*, 23.

Framework. It outlines their mandate to support social enterprises and provides measurements to gauge their success.

The Jubilee Fund¹⁵ is an important resource for the social enterprise sector in Manitoba through their work to raise awareness and address poverty and social justice issues. The Fund gathers resources to finance social enterprises, community projects, and small business or worker co-operatives. The Jubilee Fund administers their own loans to support projects that address core community needs. Several social enterprises and community economic development initiatives in Manitoba have accessed financing from the Jubilee Fund.

The Assiniboine Credit Union (ACU) is another long-time supporter of social enterprises in Manitoba. The ACU has played a significant role in the success of start-up social enterprises by mentoring, promoting, and providing accessible grants, loans and financing. The ACU consciously strives to use their extensive purchasing power to procure from social enterprises whenever possible. In addition, ACU works closely with the Jubilee Fund to secure loans with sufficient equity for social enterprises that do not meet ACU credit requirements.¹⁶

¹⁵ The Winnipeg-based Jubilee Fund was launched in 2000 for the purpose of raising awareness and addressing poverty and injustice by bringing together resources to support community projects, housing and small businesses or worker co-operatives.

¹⁶ Wuttune, W., Rothney, R., & Gray, L. *Financing Social Enterprise: A scan of financing providers in the Manitoba, Saskatchewan and Northwestern Ontario region*. 25.

AGENTS OF SOCIAL CHANGE

Social enterprises often blend with the conventional business community, rendering them indistinguishable from other business enterprises. It is likely most people at some point have shopped at a social enterprise without being aware of it. Several social enterprises use effective marketing strategies with consumers and the wider community. However, most social enterprises often lack the resources and the time to publicize their social, cultural, or environmental missions. In this section, we bring the *social* half of *social enterprise* to the forefront. We present what our surveys revealed regarding why social enterprises operate, what demographic(s) they serve, and how they benefit their targeted demographic(s).

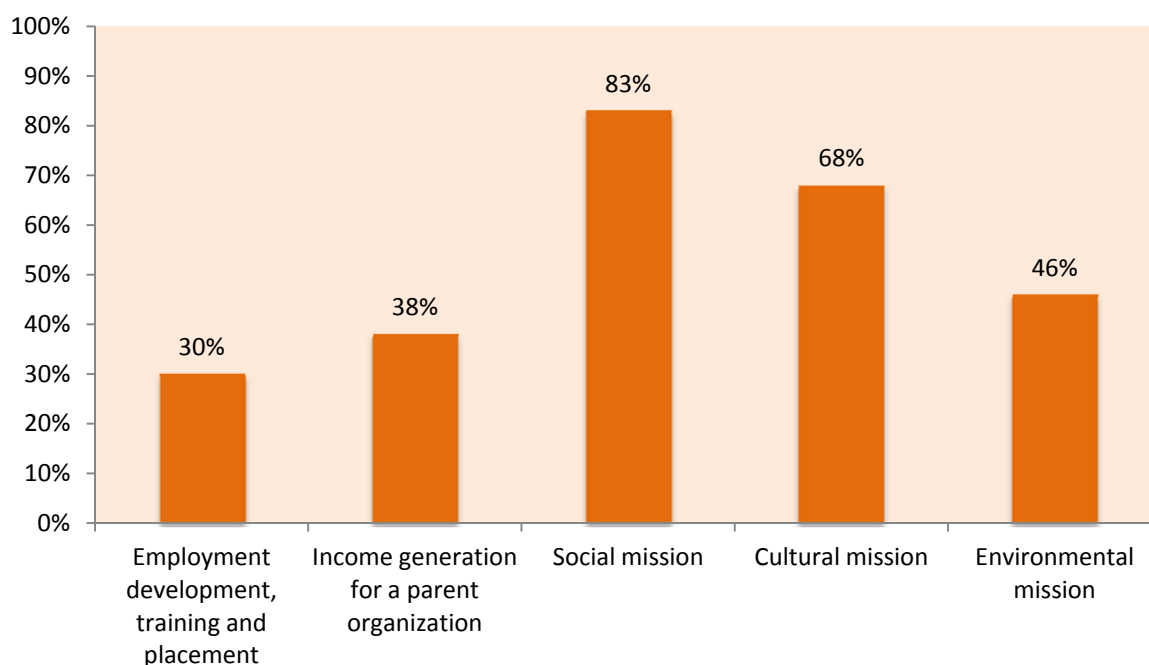
Stating the reason certain social enterprises exist posed a particular challenge for our research team. The central challenge, inherent in all questionnaire-based research, was the inability to account for the respondents' personal interpretation of the questions posed and the terms used. This problem was particularly salient in this survey when participants were asked to identify the purpose or mission of their social enterprise. Respondents were asked to check a box beside all the answers that applied. Their options included: employment development, training, opportunities; income generation for a parent organization; social mission; cultural mission; and, environmental mission. No glossary was provided for these terms to encourage respondents to self-identify with their social enterprise's mission and purpose.

Our statistics concerning the purpose of social enterprises thus provides only a helpful indication of the complex reasons why particular social enterprises exist and how they serve our communities. Social enterprises that responded to this survey exist for a variety of purposes:

- 30% of social enterprises indicated they provide employment development, training and placement support;
- 38% of social enterprises generate income for a non-profit parent organization, thereby increasing its financial sustainability;
- 83% of social enterprises operate to fulfill a social mission;
- 68% of social enterprises operate to fulfill a cultural mission;
- 46% of social enterprises operate to fulfill an environmental mission.

Figure A1 demonstrates the diversity of social enterprises in Manitoba. Of note, each category, or purpose, is non-exclusive. Respondents were encouraged to select all categories applicable to their social enterprise.

Figure A1: Profile of social enterprises by non-exclusive purpose (reflecting 118 respondents)*



*Respondents were asked to select each option that applied.

These statistics provide a broad indication of the purpose, but it is important to look beyond the numbers to appreciate how social enterprises are filling gaps in our communities and economy. There are five broad areas of focus social enterprises generally serve: employment development and training; revenue generation for a parent organization; serving a social purpose; environmental objectives; and, cultural objectives.

(1) Social enterprises established for the purpose of creating employment and training opportunities aid in reducing poverty, creating opportunities for the underserved and stimulating economic development in struggling urban and rural communities. Some of these enterprises even help to reduce crime rates and recidivism by providing and instilling a sense of pride and purpose through meaningful employment and training opportunities. Several businesses included in this project are helping to integrate newcomers by creating a sense of community, offering essential services such as language training and providing employment opportunities.

(2) Many social enterprises are established by non-profit organizations to generate revenue to support their core activities. In these instances, social enterprises are being used to help meet the costs of providing subsidized or free services to the organization's targeted demographic.

(3) It is not surprising that a high percentage of social enterprises claimed to serve a social purpose, as this mission can be interpreted broadly and holistically. In a sense, all social

enterprises serve some form of social purpose, but some organizations may not articulate it as defined in our survey. By pursuing a social mission, many social enterprises are reducing poverty, creating opportunities and benefiting their community by providing goods or services that might otherwise be inaccessible.

(4) The pursuit of a cultural mission is included in our definition of a social purpose. Social enterprises serving a cultural purpose promote and preserve our traditions and history, train and support artists, and make the arts accessible to all Manitobans. This category is represented in our survey by a wide variety of social enterprises, including art galleries, farmers' markets and entertainment venues.

(5) Recycling, eco-tourism, and education-based social enterprises, also included in our definition of a social purpose, address urgent environmental issues. The majority of farmers' markets also identified as serving an environmental mission for their work in reducing food miles and promoting healthy, sustainable dietary and agricultural practices.

In an era of government retrenchment and economic inequality, social enterprises empower communities to harness an entrepreneurial spirit and introduce community values in the conduct of business. Most importantly, the social economy presents an opportunity for communities in Manitoba to address local employment, social, cultural, and environmental challenges with a local entrepreneurial solution.

Analyzing Social Enterprises by Purpose:

The purpose of the social enterprise exerts a clear influence on the scale and the nature of the operations. We propose three mutually exclusive ways to classify social enterprises based on their stated purpose. Firstly, there are social enterprises whose primary purpose is to generate income for its parent non-profit organization. Secondly, there are social enterprises intended to fill a social, cultural, and or environmental mandate, but do not identify income generation or employment development as their core mandate. Lastly, we grouped social enterprises that serve either a social, environmental, or cultural mission *and* provide employment development and training under the 'multi-purpose' category.

Income-focused: defined as an organization with a singular purpose (income-generation) or, if two purposes, one is income and the other is either social, cultural or an environmental purpose.

Socially, culturally or environmentally-focused: an organization with a social, cultural or environmental focus, and which has neither income-generation nor employment as an additional focus.

Multi-purpose focused: an organization that has a combined intent of creating employment opportunities *and* at least one other purpose, i.e., social, cultural, or environmental.

Table 6, which can be found in Appendix D, compares social enterprises of these three types across a range of indicators:

- Organizations whose purpose is employment development, training and placement are as likely to have an income generation purpose as not.
- Organizations with a social, cultural or environmental mission are less likely to have an income generation focus.
- Organizations that are employment focused, including those with large government contracts, exhibit a closer link between profits and mission – probably also indicative of social enterprises that compete financially with the private sector for government contracts.

Found in the end of this section is an analysis of the social enterprise sector's role in reducing poverty in Manitoba. This 'poverty-reduction focused' category of social enterprises is comprised of respondents that identified as serving the following demographics: low income communities, homeless individuals and/or people with employment barriers. This poverty reduction cluster also includes social enterprises that place an emphasis on providing employment development training, and/or placement opportunities.

Demographics Served by Social Enterprises:

Social enterprises are created to support and serve various demographic groups:

- Over half of responding social enterprises in Manitoba serve multiple populations.
- Social enterprises in Manitoba tend to gravitate toward supporting low-income individuals, Aboriginal People, people with mental disabilities, elderly people, families, and youth.

For the purpose of this research, 'people served' are defined as the beneficiaries of a social enterprise's employment development, social, cultural or environmental objectives. Therefore, individuals who are engaged in purely market transactions, or in other words, are customers of the social enterprise, were not counted in the people served. The question was left intentionally broad to reflect the diversity of a social enterprise in enriching an individual's life or contributing to their wellbeing. For example, beneficiaries may include individuals who participated in a training program, took advantage of social opportunities, or were employed by a social enterprise with an employment development focus.

The large number of social enterprises serving low-income individuals demonstrates many organizations have recognized the social enterprise model as an effective tool to serve the needs of a sizeable portion of the population virtually overlooked by traditional market factors. A 37% provincial poverty rate in 2004 is indicative of the thousands of Manitobans who potentially benefit from supports and services directed at low-income individuals.¹⁷

The high number of social enterprises designed to serve Aboriginal and First Nations people reflects the large and rapidly growing Aboriginal population in Manitoba. In 2006, 15.5% of

¹⁷ Province of Manitoba. Manitoba Finance, (2007). *Reducing poverty in Manitoba* (Budget Paper E).

Manitobans identified themselves as Aboriginal, the largest relative provincial Aboriginal population in Canada outside of the three territories.¹⁸ In 2006, one in ten Winnipeg residents identified themselves as Aboriginal— the largest percentage of any major city in the country. The Manitoba capital also claims to have the largest urban Aboriginal population in absolute numbers, at 68,380.¹⁹ Moreover, in 2005, 28.6% of Aboriginal people in Manitoba earned an income below Statistics Canada's low-income cut off rate compared with 21.7% in the rest of the country.²⁰ The statistics concerning the population of Registered Indians living in urban centres are even more revealing. More than 50% of urban Aboriginal people living below poverty rates reside in the Winnipeg metropolitan area.

More than half of Manitoba's social enterprises serving low-income individuals (18/43 respondents) and Aboriginal people (18/35 respondents) are located in Winnipeg's inner-city neighbourhoods. Meanwhile, the majority of social enterprises (28/35 respondents) that support the elderly are found in rural communities across Manitoba.

It is difficult to conclude that the number of social enterprises serving low-income individuals is a direct result of a given region's poverty rates. However, it is fair to assume that social enterprises serving impoverished people are responding to an important gap left by the conventional market economy. Social enterprises have proven to be an effective model for combating poverty. Although social enterprises create economic opportunities for individuals through a business model, they are better equipped to tackle these issues because they are not motivated by profit and are not obliged to distribute surplus revenues to shareholders. Thus, surplus revenues are reinvested in fulfilling the social mandate of the organization. More than 80% of thrift stores, for example, identified themselves as serving the low-income demographic because they sell goods that meet basic needs, such as clothing, at below-market costs. Indeed, social enterprises, such as thrift stores, often create a double benefit for low-income individuals. Many thrift store outlets that generate surplus revenue, while providing needed goods, donate the proceeds to community initiatives to further support low-income individuals.

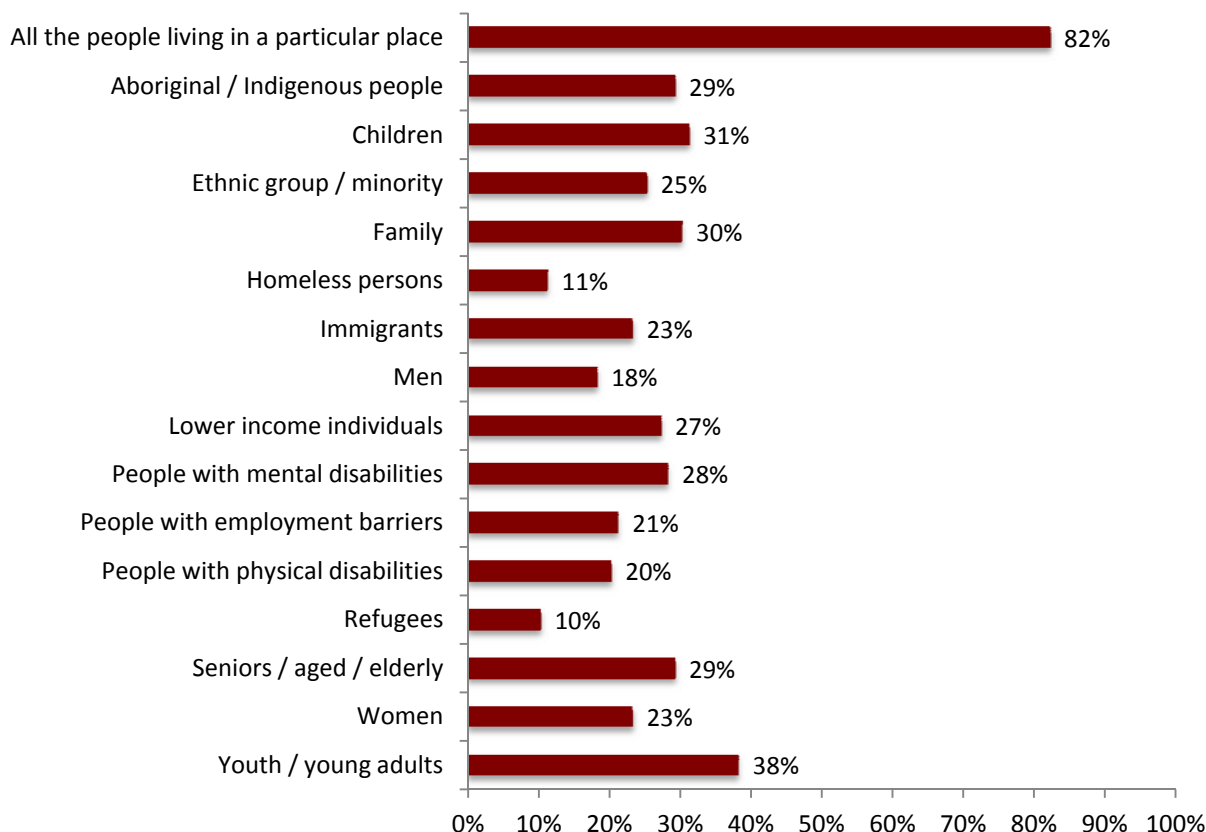
As part of their mission, social enterprises will often train, employ or provide services to designated demographic groups. Figure A2 profiles the demographic groups that each responding social enterprise served in 2010. The categories and percentages are not mutually exclusive.

¹⁸ Human Resources and Skill Development Canada. (2011, Oct). *Canadians in Context - Aboriginal Population*.

¹⁹ CBC News. (2008, Jan). *Winnipeg has most aboriginal people in Canada*.

²⁰ Noel, A., & Larocque, F. (2009). *Aboriginal peoples and poverty in Canada: Can provincial governments make a difference?*. Montreal: Université de Montréal.

Figure A2: Groups served – percent (reflecting 118 respondents)



The People Behind Social Enterprises:

Social enterprises engage people in multiple ways, unlike the employee and client relationships in a traditional business. Social enterprises are designed to re-democratize and humanize the market economy by working for, in, and with the community.

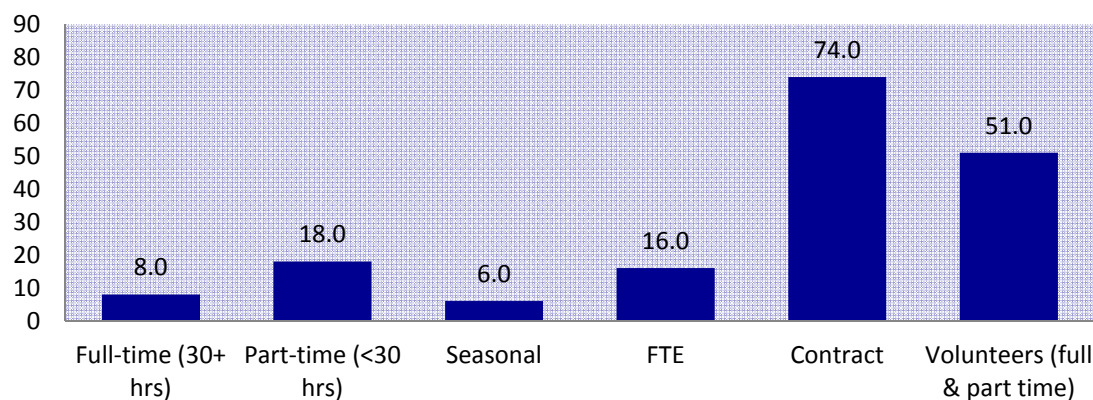
For most social enterprises, the relationship-building process is established before the business has even opened its doors. Generally speaking, social enterprises are most successful achieving their objectives when they engage with a wide variety of stakeholders from the community it intends to serve. This input is key in the process of identifying how a social enterprise might address the needs in a community, and of ensuring community investment and support.

Therefore, the same individual may have multiple, intersecting connections to a social enterprise, as a member, as a recipient of training, employment and services, and as an employee or volunteer. In 2010:

- 42% of responding social enterprises indicated they maintain a membership base with an average of 55 members. In total, 6,274 people maintain some form of membership in the responding social enterprises.
- The responding social enterprises were responsible for 931 full-time and 2,080 part-time and 741 seasonal positions, as well as 7,500 contract positions.
- The 76 survey respondents that provided complete financial data created 909 full-time equivalent (FTE) positions and paid more than \$18.2 in combined wages and salaries. This suggests average earnings of \$20,078 per FTE in 2010.
- Fulltime, part-time and seasonal positions represented an estimated 1,832 FTE employees.
- A total of 3,450 people (92%) of the 3,750 full-time, part-time, or seasonal employees in responding social enterprises in Manitoba are employed members of designated social groups, as reflected in the mission of the social enterprise (e.g.'s, people with disabilities and/or other employment barriers).
- Responding social enterprises involved 5,870 full- and part-time volunteers.
- Responding social enterprises also provided training to 6,890 people and provided services to 467,519 people. It should be noted that the same individual Manitoban could be trained and/or served by more than one social enterprise, and that some social enterprise serve people outside the Province.

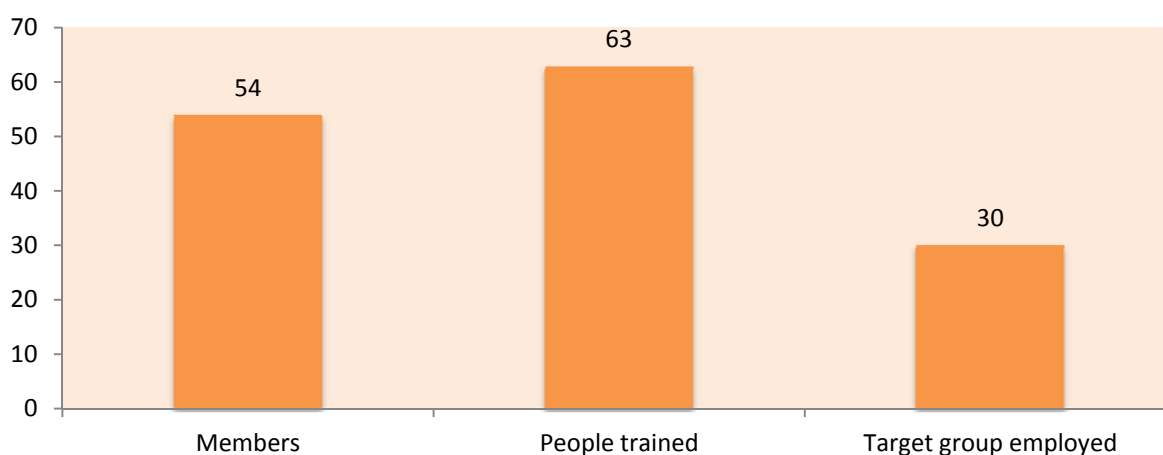
It is worth noting that we did not request detailed information related to the wages paid by social enterprises in Manitoba. Therefore, we cannot isolate the average earnings of individuals with barriers to employment that work at social enterprises. However, several responding social enterprises - particularly those that provide employment for individuals living with mental disabilities - apply a per diem model of compensation for their employees. Although these employees may receive below-average wages, their incomes are supplemented by comprehensive support services provided by non-profit organizations that operate these social enterprises. For these reasons, many social enterprise jobs will not correspond with high wages. Unfortunately, this limitation in our method was identified following the survey. It would be valuable for future researchers to request respondents identify the value of wages paid in each employment category (e.g., full time, part time, seasonal, and contract).

Figure A3: Social enterprise employment – mean (reflecting 118 respondents)



We did not include the simplest relationship a person can have with a social enterprise – that of customer. Our survey did not query social enterprises on how many customers were served within the past year for a number of reasons. Primarily, it would be difficult to attain reliable data on these figures. However, in most instances, people and businesses who procure goods and services from social enterprises are making conscious decisions to support a cause while fulfilling their consumer need to make high-quality purchases at a competitive price. We also hope this project might encourage more consumers to consider social enterprises when making purchasing decisions.

Figure A4: Number of members, trainees, target group employed and volunteers – mean (reflecting 118 respondents)



People Served – Employees, Trainees, Volunteers and Members:

Perhaps one of the most striking figures this survey revealed is the large number of people social enterprises in Manitoba served in 2010. Surveyed social enterprises served a total of 467,519 individuals, with an average of 4,212 people served per social enterprise in 2010.²¹ This statistic speaks to the sheer breadth and pervasiveness of the benefits of social enterprises not only in the provincial economy, but also in our communities.

As mentioned above, ‘people served’ are defined as the beneficiaries of a social enterprise’s employment development and social, cultural, or environmental objectives.

Employment:

Training services and employment offer another way in which individuals participate in social enterprises. These relationships also exist in conventional businesses, but social enterprises also train and/or employ individuals to improve the outcomes for that individual, not solely as a

²¹ This figure only accounts for those participating social enterprises that responded to the survey question: “How many individuals did you serve in 2010?” Of 118 participating social enterprises, 111 responded to this question.

means to improve the financial ‘bottom line’. Social enterprises provide meaning and dignity through work for marginalized individuals or those individuals with a disability.²²

Table 2: Employment

Employment	(Mean) Range in 2010
Members of designated groups employed in 2010	(30) 0 – 1000
Full time (work 30+ hrs per week)	(8) 0 - 180
Part time (work <30 hrs per week)	(17.9) 0 - 811
Seasonal	(6.4) 0 - 400
FTE (estimate)	(15.8) 0 - 352
Contract	(74.3) 0 - 7500
Volunteer (full- and part-time)	(51.3) 0 - 350

Social enterprises also have full-time, part-time and seasonal employees, designated in the Table 1, above. Contract workers provide another important source of labour for social enterprises. Once again, these individuals may be members of designated groups, especially if the social enterprise is involved in marketing the products of independent producers classified as contractors. Likewise, the volunteer category includes persons engaged in traditional charitable activity, as well as members of designated groups who volunteer to support the social enterprises that provide them with services (especially common amongst social enterprises with a strong employment-training and linkage aspect in their mission).

The figures in Table 1, above, are a testament that social enterprises can offer stable and meaningful jobs for those typically under-represented in the labour market. However, social

²² Note that our employment numbers are conservative regarding estimation of impact of social enterprise activity. For example, some marketing and co-operative social enterprises that work with, for example, small-scale farmers, refugees, street vendors, to ensure that they receive market access and fair trade prices for their product are recorded as receiving services (i.e., marketing, distribution, technical advice) and working as ‘contractees’ but are not recorded as employees. Many of these people would not be receiving an income without the activity of the social enterprise, but to call them employees in the standard sense is also not accurate. Where social enterprises place members of designated groups in employment, these individuals may be counted as FTEs or as contract workers, as appropriate. Somewhat balancing this underestimation is that in a limited number of other cases, the ‘employed’ from designated groups are counted as ‘unpaid volunteers’. The bottom line is that the employment of individuals from designated groups is broadly but not precisely encompassed within the count of paid employment (i.e., FTEs) and so should be interpreted with care. Of course, paid employees also include professional and other staff that do not face employment barriers and are not employed as part of the mission of the SE.

enterprises also employ individuals from the mainstream labour force. Being employed in a social enterprise often requires a specialized skill-set and attitude. The manager of a social enterprise café that hires at-risk youth, for example, would need to possess conventional management skills, but must also be capable of managing and supporting the café's targeted employment demographic.

People Trained:

On average, a social enterprise in Manitoba trained 63 people in 2010. In total, responding social enterprises trained 6,890 individuals in Manitoba. While a percentage of those trained most likely work directly for the social enterprise, the vast majority of individuals were provided with training opportunities as a part of the social enterprise's overall purpose and objectives. The 42 social enterprises that train, employ, or provide services to people with employment barriers as a primary focus, trained 4,441 people in 2010. The people trained by these social enterprises include at-risk youth, individuals living with mental and physical disabilities, addictions and individuals who have struggled to find stable employment due to criminal records. However, our statistics concerning individuals trained are reported with caution because in some circumstances, respondents may have included people who would otherwise be considered customers.

Volunteers:

The individual and societal benefits gained from volunteering are well understood. In Manitoba, social enterprises offer thousands of mutually beneficial volunteering opportunities. Due to limited resources, many social enterprises rely on the commitment and passion of volunteers. Social enterprise volunteers perform a wide variety of tasks and represent a significant portion of the sector's labour force. In fact, 92% of social enterprises in Manitoba employed at least one volunteer in 2010. The total number of associated volunteers in Manitoba was 5,870, which averages to 51 volunteers per responding social enterprise. Those who worked more than 10 hours a month comprised 60% of all volunteers. However, paid and unpaid labour are not mutually exclusive, as 70% of social enterprises that used volunteer labour *also* employed hired staff.

Members:

Responses to survey questions regarding the number of members associated with a social enterprise revealed an average of 55 members. A total of 6,274 members of social enterprises were reported in Manitoba. Manitoba social enterprises reported a membership base ranging from zero to 500.

Social Enterprises Reducing Poverty

Our survey results demonstrate that poverty reduction is a common purpose for many social enterprises. Social enterprises reduce the structural causes of poverty by providing employment and training opportunities to people with barriers to employment. They can also alleviate the symptoms of poverty by generating revenue to help fund emergency services such as shelters and community programs that assist the most vulnerable and disadvantaged individuals, families and communities.

Although the survey did not explicitly ask respondents whether they address issues of poverty, it is clear that providing economic opportunities to low-income individuals and mitigating the consequences of poverty is a core function of many social enterprises in Manitoba. Using a combination of questions, we identified a 'poverty reduction-focused' category of social enterprises, comprised of respondents that identified as serving the following demographics: low income communities, homeless individuals and/or people with employment barriers. This poverty reduction cluster also includes social enterprises that place an emphasis on providing employment development, training, and/or placement opportunities.

- 53.3% of responding social enterprises in Manitoba served a poverty-reduction purpose. In other words, more than half of all respondents identified employment development, training, and placement as a core mission or identified people with employment barriers, low-income individuals, and/or homeless individuals as one of their target demographics.
- Poverty-reduction focused respondents employed 2,531 individuals with barriers to employment and trained 5,725 individuals. As an average, poverty reduction social enterprises employed 41 individuals with barriers to employment and trained 97 individuals.
- Responding social enterprises with a poverty-reduction focus paid an average of \$365,151 in wages in 2010. In total, poverty-reduction social enterprises spent more than \$15.7 million in wages in 2010.
- 36.4% of respondents served a low-income demographic, the second highest response rate related to demographics served.
- 11% of responding social enterprises identified the homeless community as a key demographic that they serve.
- 22% of poverty reduction-focused respondents conducted their work on an international scale, compared to 7.3% of remaining respondents. This is largely due to many thrift stores in Manitoba using their revenues to fund overseas emergency relief and employment programs.

Social Enterprises Reducing Poverty (continued)

A clear indicator of a social enterprise dedicated to reducing poverty is the extent to which it is committed to creating employment opportunities for individuals with barriers to employment. These barriers may include people living with physical disabilities, mental disabilities, addictions and individuals with criminal records. By developing employable skill sets and providing valuable work experience, these social enterprises strengthening labour markets and increase the individual's ability to provide for themselves and their families. According to our available data, poverty-reduction focused social enterprises paid 2,531 workers with barriers to employment an average of \$6,200 in 2010. Although this number may appear low, of note is these wages reflect an overall average of full-time, part-time, and casual workers. If wage expenditures could be isolated for full-time and casual employees, we would expect to find much higher average wages for longer-term workers.

Second-hand thrift stores represent a significant portion of social enterprises in Manitoba working to reduce poverty in their communities. Although the majority of thrift stores rely on volunteer labour – thus, do not provide employment development opportunities – they do represent a large portion of social enterprises serving low-income populations and individuals struggling with homelessness. In fact, 84% of participating thrift stores identified as serving low-income populations and 32% provide services to homeless individuals. The provincial averages of social enterprises serving these populations are 36.4% and 11%, respectively. During survey interviews, thrift stores perceived their poverty reduction work as two-fold. Firstly, their net profits, which averaged more than \$100,000 in 2010, are donated to various community charities, local organizations, and international aid programs that provide support services to individuals in need. Secondly, thrift stores claim to directly serve low-income and homeless populations by providing quality, second-hand goods at prices well below market rates.

THE ANATOMY OF THE SECTOR

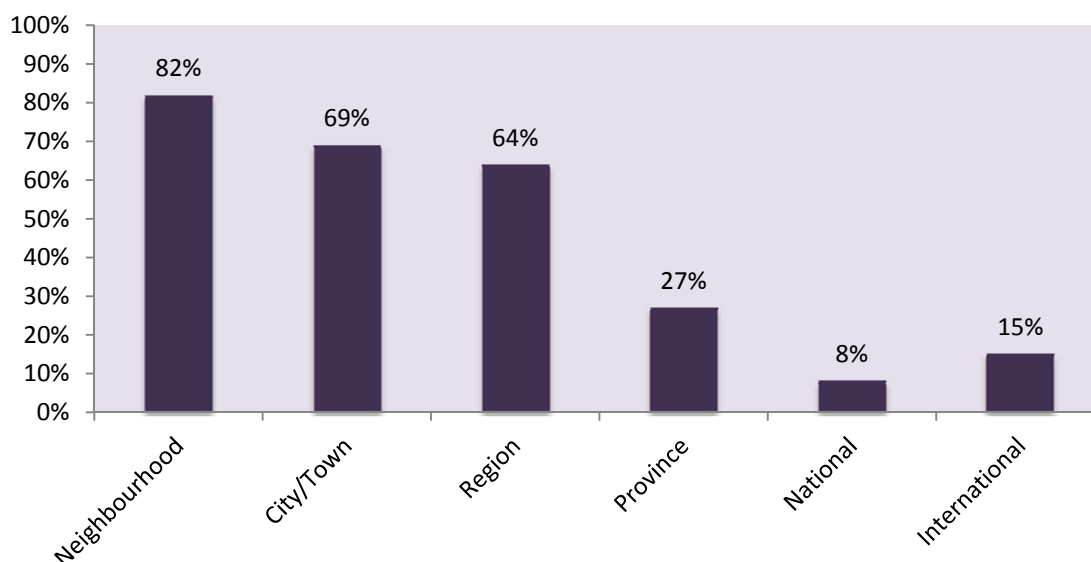
While the previous section revealed the diversity of market activities and social, cultural, and environmental objectives of the social enterprise sector, this section considers the empirical complexity of the sector. Geographic, organizational, and structural components of responding social enterprises in Manitoba are analyzed.

Location of Services

The scope of operations for responding social enterprises in Manitoba is primarily, though not universally, local. More than 80% of social enterprises serve their neighbourhood or local community. Slightly more than one in ten enterprises, however, operate on an international scale. It is interesting to point out that 40% of social enterprises in Winnipeg serve a provincial demographic, whereas only 20% of social enterprises beyond the capital serve a provincial demographic. However, nearly twice as many non-Winnipeg social enterprises work on a regional scale (78%) compared to Winnipeg social enterprises (41%). The reasons for this disparity are unknown, but one might speculate that due to the larger average size of social enterprises in Winnipeg, they are better equipped to export, or make their services available, to their targeted demographic across the province. On the other hand, non-Winnipeg social enterprises are designed to serve a much more dispersed population without immediate access to necessary resources. The three most popular responses regarding location of services are as follows:

- 82% of responding social enterprises serve their neighbourhood/local community
- 69% offer their services within the boundaries of their home city/town
- 64% serve a wider county/regional district

Figure B1: Geographic area of activity – percent (reflecting 118 respondents)



Location of Social Enterprises:

Social enterprises are found in communities of all shapes and sizes. Of the 118 survey respondents, 36% are located in Manitoba's largest urban centre of Winnipeg, although the city represents more than half of the province's population. The remaining 64% operate in smaller cities, towns and rural communities throughout the province. Winnipeg may be home to fewer social enterprises; however, those located within the province's capital are generally much larger than social enterprises in smaller markets.

- On average, responding social enterprises in Winnipeg trained 128 people in 2010, compared to an average of 28 people trained by social enterprises elsewhere.
- Responding social enterprises based in Winnipeg employed an average of 65 people, identified with barriers to employment (2,680 in total), whereas those social enterprises not in Winnipeg employed significantly fewer people, only 10 of these individuals on average (770 in total).
- An average of 8,667 individuals or 346,696 in total were provided services from Winnipeg social enterprises in 2010, while non-Winnipeg social enterprises served 1700 individuals on average or 120,823 in total.

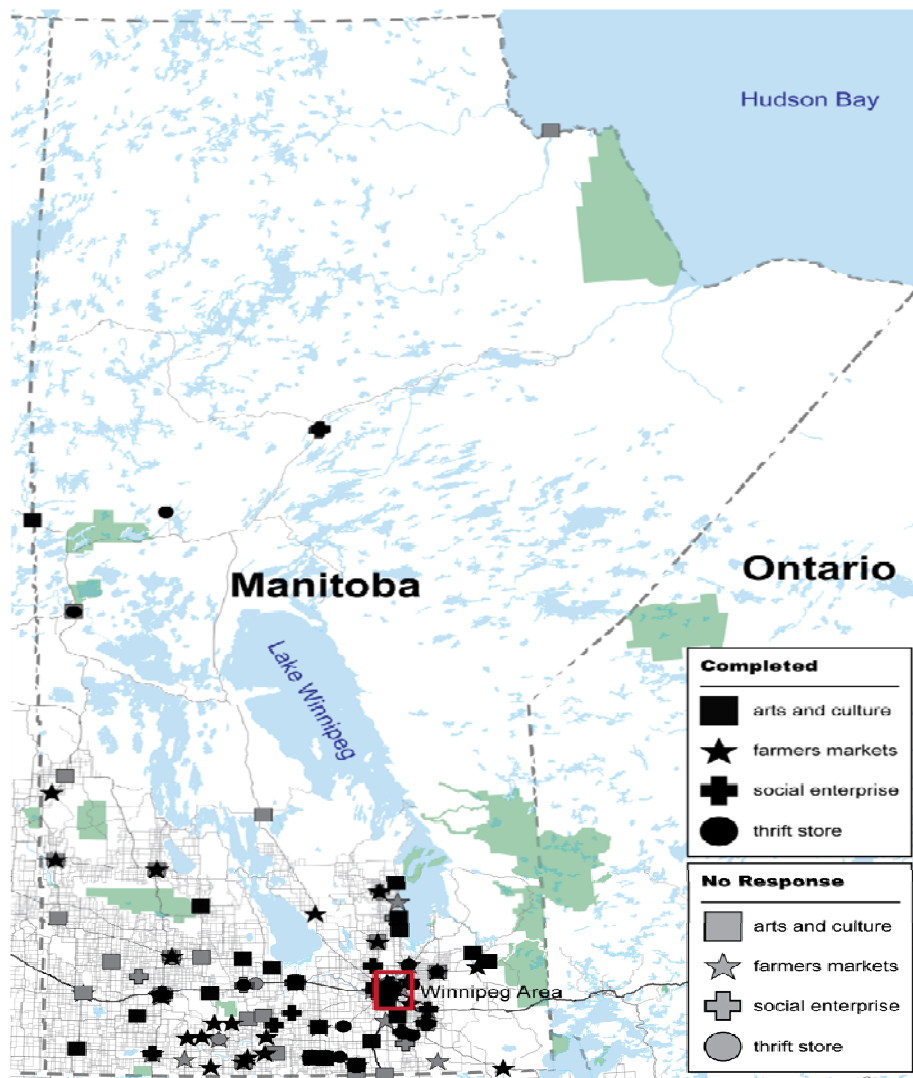
Overall, these statistics are not surprising due to the much larger and denser population in Winnipeg. In fact, the combined population of Manitoba's ten largest cities, not including Winnipeg, make up less than 20% of the capital's total population.²³

Geographic Profile:

The following map provides a view of the geographic location of social enterprises in Manitoba. Even at a glance, it is clear that the responding social enterprises are clustered around major metropolitan centres and transportation corridors.

²³ Determined based on 2006 population estimates for Brandon, Thompson, Steinbach, Portage la Prairie, Selkirk, Winkler, Dauphin, Morden, Flin Flon, The Pas, which totals 123,052 compared to Winnipeg's 633,451.

Figure M1: Social enterprise locations - Manitoba



Additional maps are located in Appendix A at the end of this document:

- Figure M2 identifies the location of social enterprises within Winnipeg. Again, it would appear social enterprises tend to cluster in major urban areas where the population is not only denser, but also where the need for the goods and services provided by social enterprises will find a market.
- Figure M3 identifies the location of the responding social enterprises in southern Manitoba.

Age of the Sector:

The longevity of a business can signify effective business practices, flexibility in meeting market demands, a strong product and/or service, and a trusted brand. These same standards apply to the social enterprise sector. The extent to which a social enterprise is established in the market

and the community can help it secure certain types of contracts, diversify or enhance services to its client base, and attract new and sustainable sources of funding. For social enterprises, their longevity may also point to the significant social, environmental, cultural and economic benefits that they have been introduced into a community. To determine how established the social enterprise sector is, our survey asked respondents how long they have been operating. Our survey revealed the following about the age of social enterprises in Manitoba:

- The mean age of responding social enterprises in MB was eighteen years.
- Farmers' markets represent the youngest grouping of social enterprises with an average age of 9.4 years.
- Organizations began selling goods and/or services shortly after they were founded (an average of about one-and-half years later), though this did vary depending on the enterprise.
- The oldest responding social enterprise in Manitoba was formed in 1914; the newest was formed in 2010.

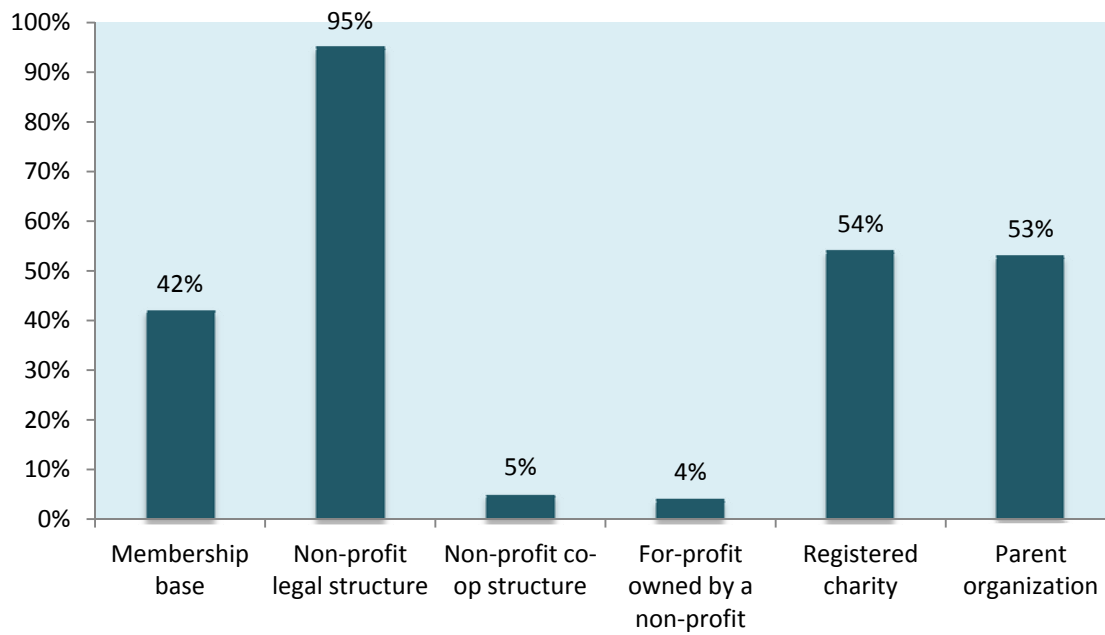
These results demonstrate that many social enterprises in Manitoba are firmly established businesses and have overcome what is termed a "liability of newness". However, these findings may also be used to measure growth within the social enterprise sector in the future. While the mean age was greater than 20 years old, 40% of responding social enterprises began operating in the market in the previous ten years. Without historical data, it is impossible to confirm the growth rate of the sector. However, this report serves as an important baseline for future province-wide social enterprise surveys.

Corporate Structure:

Nearly all respondents identified themselves as having a non-profit corporate structure, which is not surprising given that a non-profit organizational structure was a key criterion in determining the inclusion of a social enterprise in this study. The few respondents who identified using a for-profit structure were fully owned and operated by non-profits.

Less than half of social enterprises in Manitoba operate with a membership base (42%), while the majority (54%) were also registered charities. The survey also revealed that more than half of the social enterprises identify as having a parent organization. A social enterprise's relationship to their parent organization also varies. Of the 53% with parent organizations, 3% identified as an independent organization operating at arms-length from the parent organization; 13% are separate organizations working closely with parent organizations; and 37% identified as an in-house program, project or department of the parent organization.

Figure B2: Percentage of responding social enterprises that identify as having a membership base, legal structure, registered charity status, parent organization (reflecting 118 respondents)



THE ECONOMIC LANDSCAPE OF THE SECTOR

Contributions to the wider economy:

Social enterprises are most frequently recognized for their social and environmental outcomes, and their effectiveness as revenue generators for non-profit organizations. However, they also make significant contributions to the growth of local economies. This section examines the financial status of the social enterprise sector and consider its impacts in a larger economic context.

Social enterprises stimulate our economies by providing meaningful employment and competitive wages for individuals facing barriers to employment. Employment figures have been examined, but the broader economic impacts of the social enterprise sector are worthy of mention. Our survey indicated responding social enterprises in Manitoba employed 3,750 people²⁴, including 3,450 individuals identified as an under-served or disadvantaged demographic. This represents a 90% inclusion rate for survey respondents. Total wages paid by responding social enterprises in 2010 exceeded \$25 million.

While the benefits of employment for an individual are evident, the value of these jobs to local economies is significant. In 1994, the Applied Research Branch of Human Resources and Skills Development Canada calculated the total loss of production in Canada due to cyclical and structural unemployment was an estimated between 3.8% and 10.2% of the gross domestic product of \$748 billion. That is, between \$29 and \$77 billion was lost due to Canada's unemployment rate in 1994.²⁵ Other economists in the U.S. have informally estimated the average economic value of a job at \$80,000-\$100,000 a year.²⁶ Applying this equation, the respondents to our survey in Manitoba generated between \$211 and \$264 million each year in saved costs associated with unemployment. By providing stable employment for individuals typically excluded from the labour market, employment-focused social enterprises help to maximize economic productivity through the development of human capital. Social enterprises also help to reduce the cost of public health and social services by building skills, capacity and providing individuals with meaningful employment.

Social enterprises also act as engines of economic growth through an impressive local economic multiplier effect. A local economic multiplier is a measurement of the number of times money

²⁴ Total employment is comprised of the total of full-time, part-time, and seasonal employees.

²⁵ Human Resources and Skills Development Canada. (1996). *Tallying the economic and social costs of unemployment*. Applied Research Bulletin, 2(2).

²⁶ Social Enterprise Alliance. (2010). *Social Enterprise: A powerful engine for economic and social development*. Social Enterprise Alliance.

circulates in a local economy. A high local multiplier means that revenues are well contained within a local economy. A low local multiplier suggests that money is rapidly haemorrhaged from a community's economy through such avenues as profits paid to non-local investors and/or purchases of non-local products. Social enterprises provide a valuable opportunity for consumers to support local businesses and local employment, which keeps money circulating within a community. This creates a multiplier effect. Research conducted on farmers' markets in the US state of Georgia, for example, found that every dollar spent at a market produced \$2.66 for the local economy.²⁷ While this current project measures the revenue streams of social enterprises, it is unable to account for the residual economic benefits these social enterprises bring into their communities. However, it can be assumed the net economic impact of the social enterprise sector is significantly higher than revenue and employment figures suggest. Future research to assess the wider economic impacts of social enterprises through multiplier effect measurements would be valuable.

Market Activities:

It is important to understand why social enterprises exist, but it is also useful to know how they achieve their goals through market activities. Similar to any traditional business model, social enterprises must serve a market niche to succeed. Our survey asked each social enterprise to identify the business sector(s) they operate in. Based on their responses, the social enterprises were entered into the following categories:

²⁷Economics Department, Georgia State University. (1999). As cited in *The economic benefits of farmers' markets*. Georgia State University.

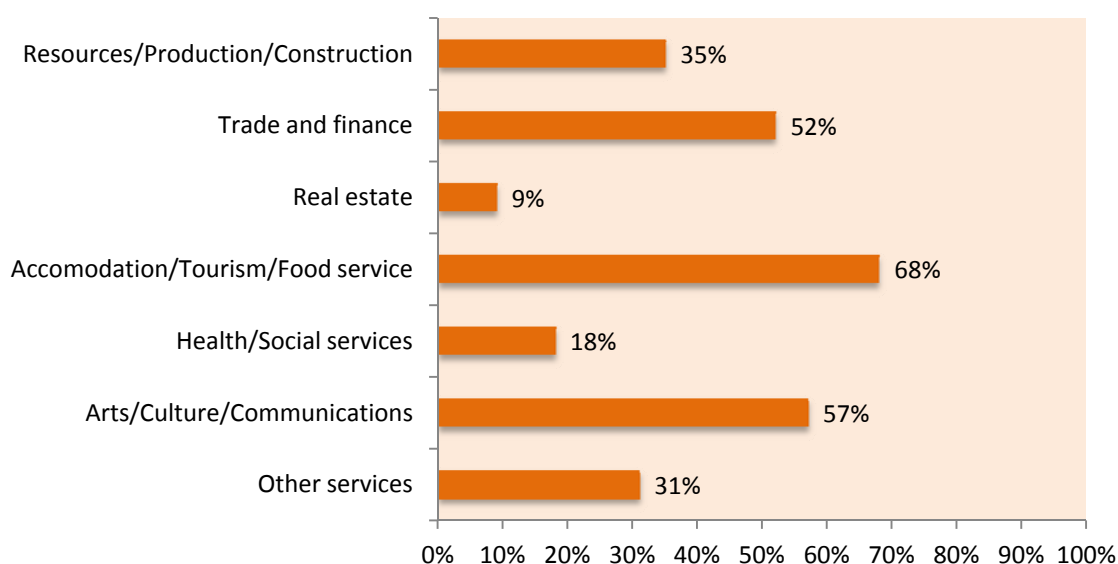
Table 3: Business sector classification

Broad Sector Grouping Based on Bouchard et al., 2008 (R-2008-01)	Detailed Sector Description (from questionnaire)	Percentage of Social Enterprises Active in This Sector
Resources, production and construction	Agriculture, forestry, fishing, mining Construction Food production Printing and publishing Production/manufacturing/sewing Repair and maintenance	34.7%
Trade and finance	Finance and insurance Retail sales (incl. thrift stores) Wholesale sales	52.5%
Real estate	Housing Property management Real estate	8.5%
Accommodation, tourism and food service	Accommodation Facilities (banquet, conference, etc.) Food service/catering Food distribution Sports and recreation Tourism	67.8%
Health and social services	Emergency and relief Employment services Environment and animal protection Health care Social services	20.3%
Arts, culture and communication	Arts, culture and communication Gallery/arts Theatre/performing arts	55.9%
Other services	Administrative services Consulting Janitorial/cleaning Landscaping/gardening Law, advocacy, politics Movers/hauling Personal/professional services Public administration services Research/education Scientific/technical services Services for businesses/social enterprises/co-ops/non profits Transportation and storage Waste management	31.4%
Multi-sector (social enterprises indicating the selling of goods or services in two or more of the above)		83.9%

The respondents were given 42 categories and were asked to select all options that applied. The categories are clustered into seven groupings to make the information more accessible. Our survey reveals only a few business sectors that social enterprises do not participate in.

- Four-fifths of social enterprises in Manitoba sell goods or services across multiple broadly defined business sectors. On average, respondents operate in 2.7 sectors.
- The most common cluster was in the accommodation, food service, and tourism sectors with 68% of social enterprises falling within these categories.
- 56% of the respondents provide goods and/or services in the arts, culture, and communication sectors.
- 53% of Manitoba's social enterprises identified themselves as providing retail trade and finance products and/or services.
- 31% of respondents operate in miscellaneous service categories.

Figure C1: Business sector classification – percent (reflecting 118 respondents)



These statistics reveal social enterprises in Manitoba are involved in a diverse range of market activities. Of note, farmers' markets and various arts and culture social enterprises each represent 28% of survey responses. Thrift shops across the province make up 22% of our completed sample list. Together, these three categories represent 88% of our available information. The high response rate among farmers' markets, arts/culture organizations, and thrift shops help to explain the figures above.

Financial Results

The most important indicator of success for privately owned businesses is profitability. Although their objectives may be different, social enterprises are not exempt from this rule, although the blended return social enterprises seek means that profit is not achieved at the expense of a social, cultural and/or environmental benefit. It is virtually impossible to achieve a long-term social, cultural, or environmental objective without financial sustainability. To demonstrate financial success, social enterprises are accountable on three fronts. Firstly, social enterprises must gain the confidence of consumers if it is to earn their business. Secondly, policy makers and government officials must be able to observe the capability of social enterprises to generate tangible economic benefits if they are to implement legislation in support of the sector. Lastly, potential sources of financial support must be able to properly assess the risks of investing in social enterprise.²⁸ Therefore, social enterprises must not only demonstrate results in the community, but also in the accounting books. Based on our survey results, it is clear that Manitoba's social enterprise sector is worthy of support

- Total revenue for responding social enterprises in 2010 was nearly \$55.4 million. This includes sales of at least \$41.5 million.
- Sales accounted for an average of 64% of total revenue per social enterprise.
- In 2010, more than three-quarters of all responding social enterprises generated more revenue than expenses, resulting in aggregate net profits of at least \$4.4 million.²⁹
- In financial terms, social enterprises in Winnipeg are much larger than those in other parts of the province, averaging nearly \$ 1.3 million total revenues (compared to less than \$175,000 elsewhere); an average of \$1.1 million in sales (compared to \$124,000 elsewhere); and an average of \$78,600 (compared to \$33,500 elsewhere) in net profits.

Figures C2 and C3, respectively, report the mean and aggregate financial performance of the respondent social enterprises for 2010.

²⁸ Leahy, G., & Villeneuve-Smith, F. (2009: London). *State of Social Enterprise Survey 2009*. Social Enterprise Coalition, 10

²⁹ Note that this figure includes operational revenue from grants.

Figure C2: Finances - mean \$

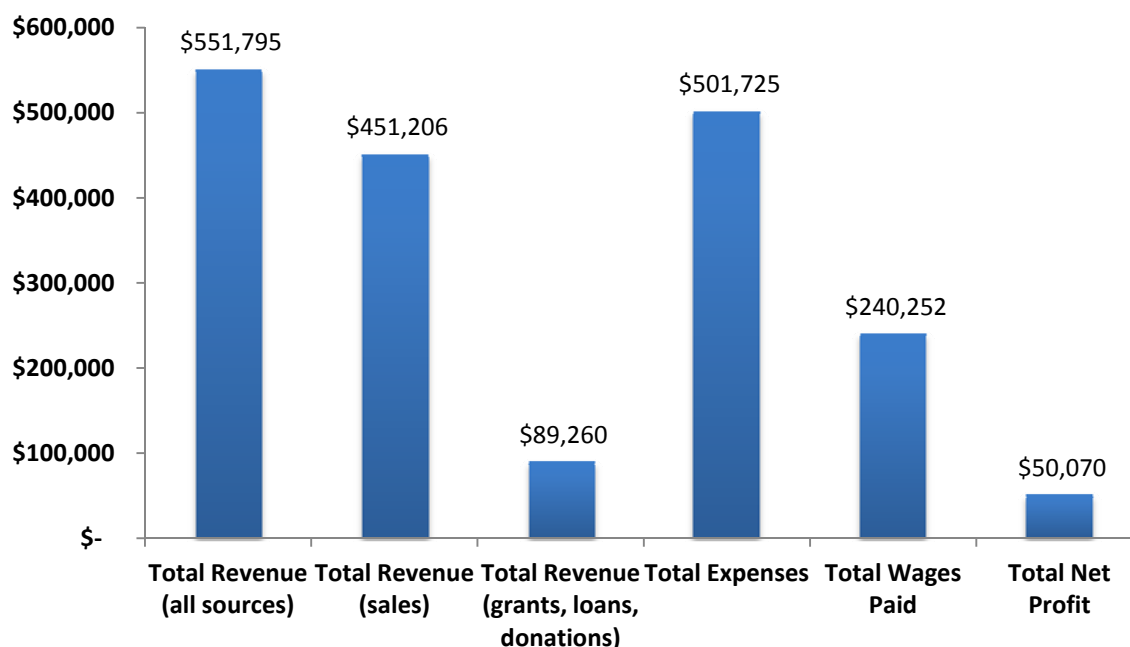
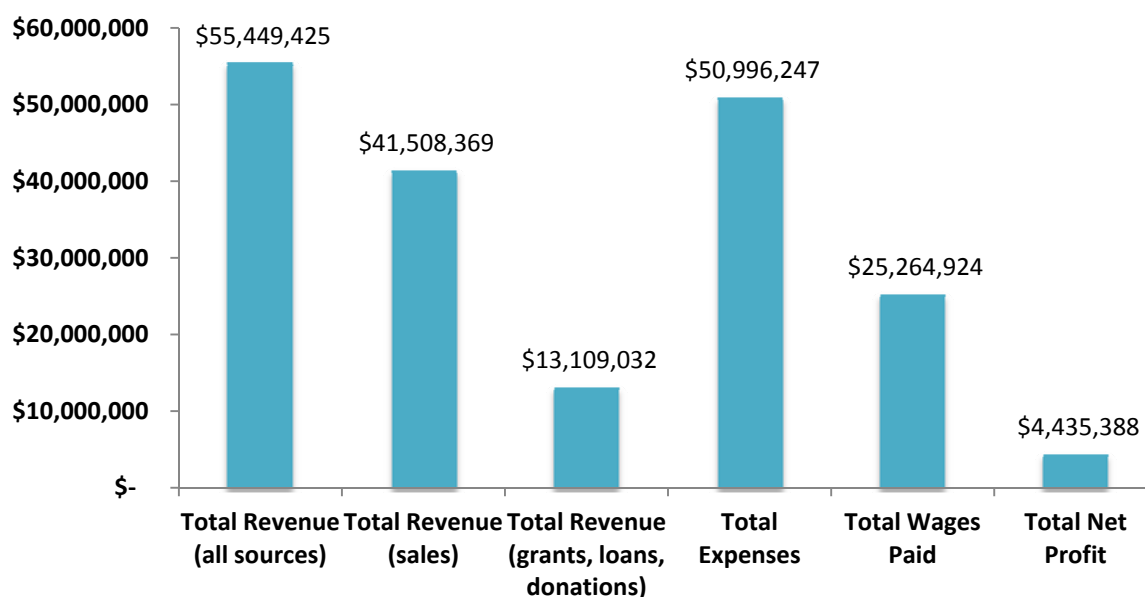


Figure C3: Finances - total \$ (reflecting 118 respondents: some provided incomplete data)



Predictably, certain categories of social enterprise fared better than others in financial terms. The reasons are varied and beyond the scope of this survey. However, it is understood some market activities are more lucrative than others. Likewise, certain social, cultural, or environmental missions may be more resource intensive than others. The following results relating to profits based on location, market activity, and purpose are worth noting:

- Responding thrift stores and multi-purpose social enterprises (those that provide employment/training opportunities *and* serve a social, cultural, or environmental purpose) are the most financially successful with a mean of more than \$100,000 in net profits reported in 2010.
- Winnipeg-based social enterprises generate twice as much revenue as those located outside of Winnipeg. However, rural-based social enterprises are more than three times more profitable than urban-based social enterprises if profits are expressed as a percent of total revenue (6% in Winnipeg; 19% outside of Winnipeg).
- Responding social enterprises with core missions in arts and culture represent the only category that did not break even on average in 2010, although by a very small margin (\$288).

Figure C4: Net profit in 2010 by location, purpose and market activity: mean \$



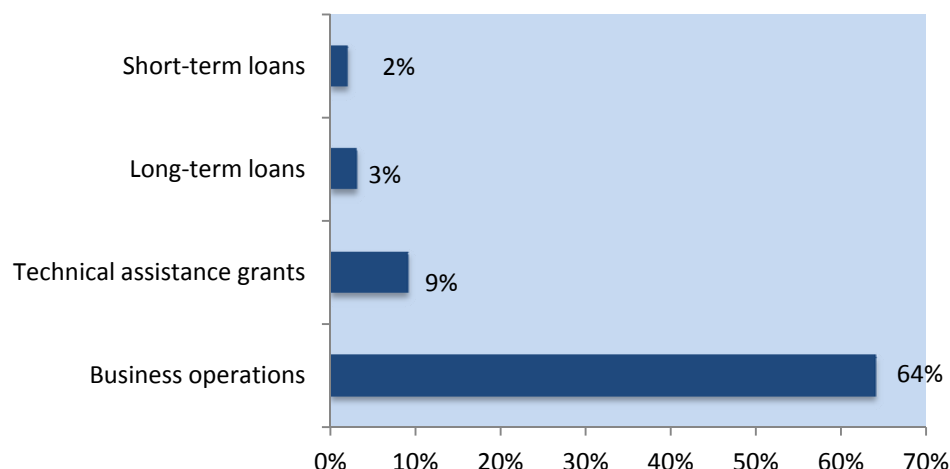
Finance and Support:

Social enterprises, like all businesses, derive their income from a variety of sources beyond primary market activities. These alternative revenue sources include government grants and subsidies, long-term and short-term loans, and private sector and individual donations. The main sources of non-trading income for social enterprises in Manitoba include:

- Governments (60%), individual donors (41%), and foundations (27%).
- Financing was most commonly used by responding social enterprises for business operations (64%). Technical assistance grants were used by 9% of social enterprises.

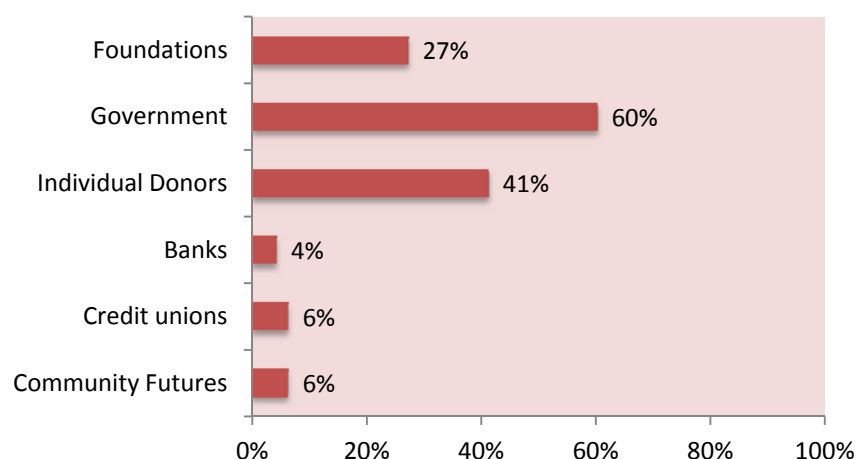
Following our data collection stage, it was brought to our attention that references to a social enterprise's debt financing should be distinct from grant funding. The study researchers were informed financing referred to either debt or equity financing (loans, bonds, and shares) and funding referred to revenue generation (fundraising, grants, donations, or sales of goods and services). Regrettably, it was not possible to isolate the results relating to long-term and short-term loans. However, it would be a distinction made in future research.

Figure C5: Purposes of finance in 2010 – mean (reflecting 118 respondents) *



**Answers are not mutually exclusive. Respondents were asked to identify all options that applied.*

Figure C6: Sources of finance in 2010 – mean (reflecting 118 respondents) *



**Answers are not mutually exclusive. Respondents were asked to identify all options that applied.*

Profitable vs. Not Profitable:

It is important to bear in mind that the concept of ‘profitability’ in isolation of societal purpose is not always useful when discussing social enterprises. However, the principle of financial self-sustainability is deeply important. Our analysis of the survey data found few differences between the profitable and the not-profitable groups. This analysis was also limited, both by sample size and the absence of prior financial records. We cannot determine if social enterprises were able to balance revenues and expense over several years, since we had access to one income statement and no balance sheet information. Nevertheless, the survey helps to dismiss the notion that social enterprises are largely dependent on grants, loans, or donations. While these financial sources are indeed important, our findings reveal, on average, the sales of goods and services is the primary source of revenue for most social enterprises in Manitoba. The following insights are worth noting relating to revenue sources:

- Those responding social enterprises not breaking even are not necessarily younger, although those not breaking even are slightly smaller across various quantitative indicators.
- Thrift stores and income-focused social enterprises generate the largest percentage of their income through sales, while generating only 20% and 22% of their income from grants or loans, and cash donations, respectively.
- Mission-focused social enterprises – whose primary mandates are to pursue social, environmental, and/or cultural missions – access a higher percentage of their revenues from grants, loans, and donations.

Although it may not be appropriate to measure the success of a social enterprise based on its profitability, many social enterprises have a core mandate to generate revenue for a non-profit parent organization. In fact, 45 respondents identified income generation as one of its primary purposes, 28 of which provided complete financial data. The 28 respondents generated an average profit of \$64,212, compared to an average of \$41,820 for the 48 responding social enterprises that did not have income generation as a purpose. This suggests that those social enterprises that focus on income generation are generally successful at creating surplus revenues to support the social, cultural, or environmental mandates of their parent organizations.

Figures C7 and C8 report on the percentage of revenue from sales, which exceeds 50% in all categories of social enterprise, except for farmers’ markets.³⁰ This verifies the extent to which social enterprises rely on market activities as a critical source of revenue.³¹

³⁰ Of note, this survey only considered farmers’ markets to mean the non-profit organizations as a whole that operate in the market. Thus, financial figures or revenue totals for the individual vendors who sell their goods at the market are not available, although this presents an important opportunity for future research in measuring the full impact of a social enterprise farmers’ market.

³¹ Only social enterprises that provided complete financial information were included in the comparative financial analysis, namely 76 of 118 respondents.

The following tables provide the distribution of social enterprises by revenue and the percentage of revenue accounted for by sales. The tables confirm the wide diversity in the size and scope of social enterprise activity, and the resiliency of their revenue streams.

To reiterate, organizations are defined in the following ways:

Income-focused social enterprises are defined as organizations with a singular purpose (income-generation) or, if of two purposes, one is income and the other employment or cultural or environmental purpose.

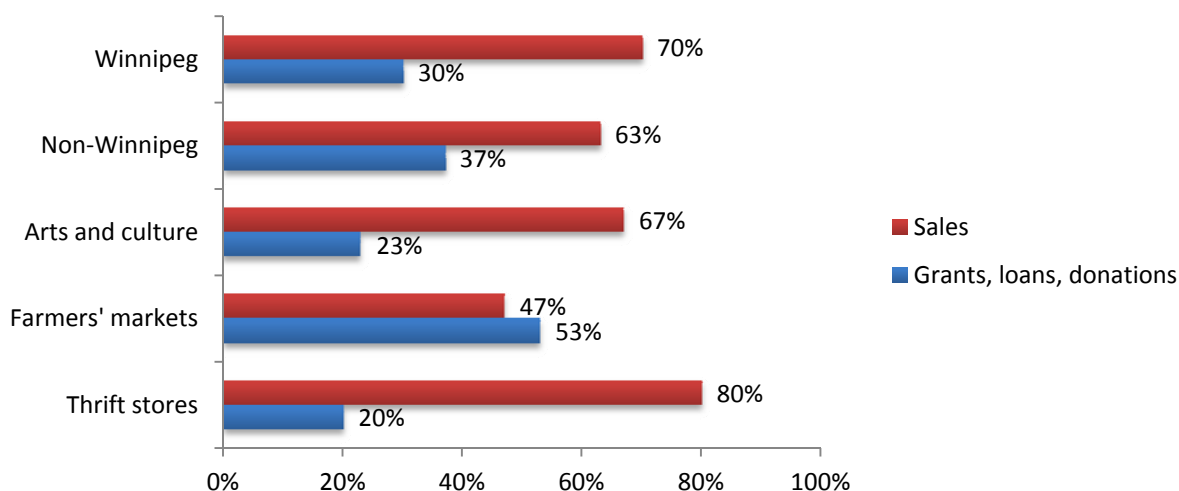
Mission (social, cultural or environmental)-focused social enterprises are organizations with one of more of a social, cultural or environmental focus, and has neither income-generation nor employment as an additional focus.

Multi-purpose social enterprises are organizations have a combined intent of creating employment opportunities *and* at least one other purpose, i.e., social, cultural, or environmental.

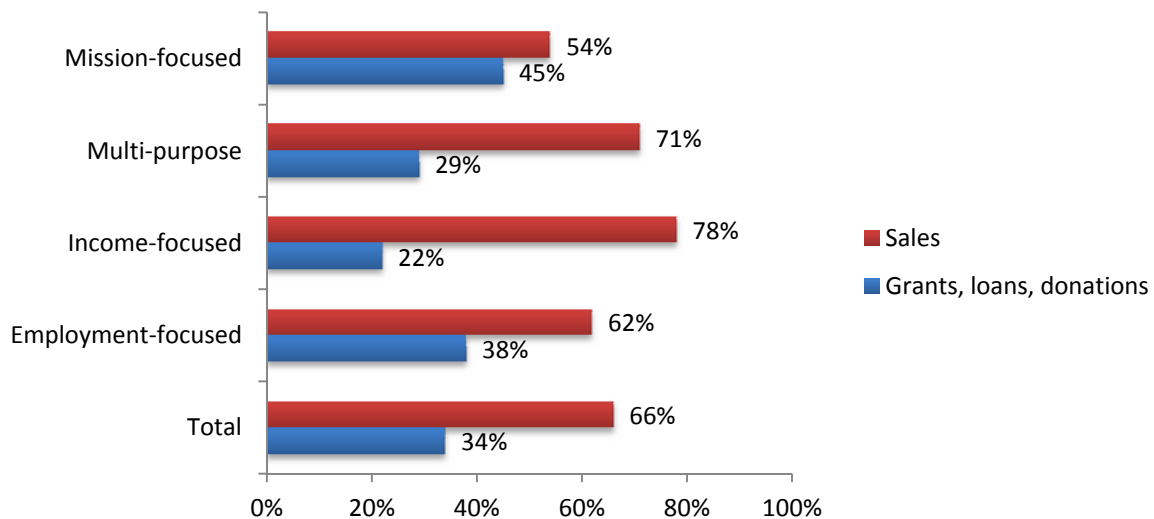
Poverty reduction-focused social enterprises include those responding social enterprises that identified as serving the following demographic groups: low income communities, homeless individuals and/or people with employment barriers. The poverty-reduction cluster also includes social enterprises that place an emphasis on providing employment development, training, and/or placement opportunities.

The categories of income-focused, multi-purpose focused, and mission-focused are mutually exclusive; a social enterprise can only be classified in one of these groups. Poverty-reduction focused social enterprises may also have an income, multi-purpose or mission focus.

Figure C7: Mean source of revenue 2010 – Location and Market Activity (reflecting 118 respondents)



Figured C8: Mean source of revenue 2010 – Purpose (reflecting 118 respondents)



Conclusion of Findings

In 2010, the 118 social enterprises that responded to the survey generated at least \$55.4 million in revenues, including at least \$41.5 million in sales. They paid at least \$25.3 million in wages and salaries to 3,750 full-time, part-time and seasonal employees, 3,450 of whom were employed as part of the mission of the organization. They also trained 6,890 people, involved 5,870 volunteers, and on average, provided services to 4,200 people.

EXECUTIVE SUMMARY

This project surveyed social enterprises in Manitoba in the spring and summer of 2011 to develop clear indicators of their nature, scope and socio-economic contribution. Indicators of socio-economic contribution included sales and revenue, expenditures, employment, volunteer engagement, and clients served and trained. The statistics and analysis included in this report are by no means definitive. Rather, this project was designed as a starting point for a much broader, and much needed, conversation about the increasingly important role of social enterprises in our local, provincial, national, and international economies and communities. We have offered a glimpse into the social enterprise sector in Manitoba, but there is an urgent need for similar projects to be replicated across the country and around the world. The more we come to understand the social enterprise sector and its benefits, the greater the support we can offer this relatively young sector in order for it to grow.

The survey results represent an initial profile of social enterprises in Manitoba. Social enterprises work in communities to fulfill training, income, social, cultural, and environmental missions. In this study, a social enterprise was defined as a business venture owned or operated by a non-profit organization that either sells goods, or provides services in the market, for the primary purpose of creating a blended return on investment, both financial and social/environmental/cultural. A further selection criterion for the social enterprise is that it must, when possible, be independently verified as a social enterprise.

The 118 social enterprises that responded to the survey generated in 2010 a minimum of \$55.4 million in revenues, including a minimum of \$41.5 million in sales. They paid at least \$25.3 million in wages and salaries to 3,750 people, 3,450 of whom were employed as part of the mission of the organization. We estimate that Manitoba social enterprises paid, on average, just over \$20,000 in wages and salary per full-time equivalent employee. They also trained 6,890 people, involved 5,870 volunteers, and on average provided services to 4,200 people.

While it is possible to separate financial and social, cultural or environmental achievements, the relationship between money and mission for social enterprises is far more complex. It is a complex blend diminished by dissection. Social enterprises may earn a profit, but this profit is only one facet of what is a continuous reinvestment in purposeful achievement to benefit the social enterprise and society-at-large. Nevertheless, this survey has revealed that social

enterprise is a highly adaptable business model, which allows these organizations to respond to changing market demands.

Social enterprises represent an innovative model that is able to redistribute the benefits and opportunity our economy creates to those members of our society largely ignored in a traditional market economy. In this way, social enterprises work within our market system to introduce a new perspective, a perspective that takes into account the wellbeing of people, communities, and our natural environment. In addition to creating jobs and enabling non-profits to sustain their services, social enterprises are addressing the gaps in our economy and providing services and needs that are otherwise unavailable and neglected.

Where do we go from here?

It is widely held that Canada needs a more diverse, sustainable, and equitable economy. It also needs a civil society that is galvanized and mobilized to create stronger and safer communities where everyone is offered a place and an opportunity. To achieve effective change, these social, economic, and environmental objectives cannot continue to be pursued separately. Fortunately, social enterprises represent a development model that blends all these goals.

The rich history of social economy development in Manitoba has experienced a surge in recent years. In the past decade, a new wave of social enterprises have populated Manitoba's markets, and are being used as a valuable tool for community economic development and for increasing the sustainability of non-profit organizations. This recent growth has been matched with a mounting interest in the private sector, a more prominent place for social enterprises in public policy and procurement decisions, unprecedented market success, and an increasing public awareness about the concept and possibilities of social enterprise. The *Canadian Guide to Social Enterprise* cites four reasons for the social enterprise sector's newfound popularity: "The understanding that there are some needs the market will never meet on its own; the opportunity to advance mission-related goals; diminished and changing nature of government funding; and the promise of social enterprise as a vehicle for social innovation."³²

Recycling, eco-tourism, and educational social enterprises (all included in our study) are helping to address urgent environmental issues. Social enterprises established for the purpose of creating employment and training opportunities are helping to reduce poverty, create opportunities for the underserved, and stimulate economic development in struggling urban and rural communities. Several businesses included in this research are helping to integrate newcomers by creating a sense of community, offering essential services such as language training, and providing employment opportunities. Some enterprises are even helping to reduce crime rates and recidivism by providing stable sources of income, and instilling a sense

³² Enterprising Non-Profits. *The Canadian Guide to Social Enterprise*, page 4

of pride through meaningful employment and training opportunities for former gang members. In an era of government retrenchment and economic inequality, social enterprises are empowering communities to harness an entrepreneurial spirit and introduce a new paradigm for conducting business.

While only the surface of this thriving and diverse economic sector has been analyzed, our research has suggested numerous opportunities for future research on this topic. For example, what would the data look like if the full contributions made by non-profit daycares, housing and museums were measured? What role can the private business sector play in supporting and collaborating with social enterprises to create more inclusive economies? Also, how do the social enterprise sectors in each Canadian province compare with one another? What do they share in common; what are their individual strengths and weaknesses? Lastly, how would Canada's national social enterprise economy compare to social enterprise sectors on an international scale?

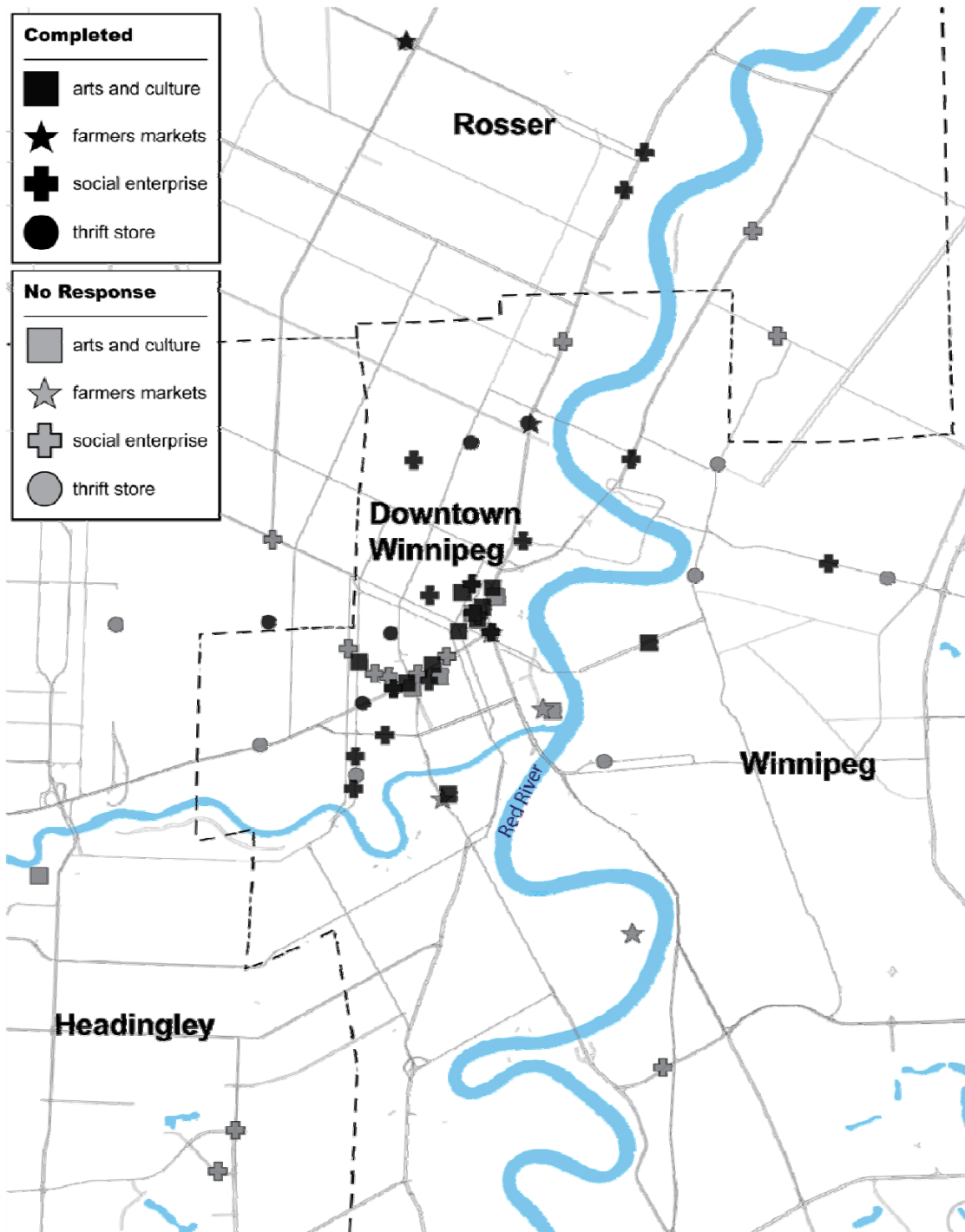
This survey revealed that social enterprise is an ambitious and competitive sector in Manitoba's economy. This research has also proven social enterprises play an important role – albeit potentially underestimated by policy-makers, the private sector and the general public – in making Manitoba more sustainable, equitable, and economically viable. We have demonstrated that social enterprises are tremendously diverse, both in their social mandates and their market activities. Furthermore, this report makes clear it is financially feasible to operate a business while providing valuable employment or training opportunities and addressing complex issues like poverty and environmental sustainability.

Social enterprise is an increasingly important part of Manitoba's economic and social landscape. The challenge ahead is to ensure that it is understood and appreciated by consumers, educators, financiers, private enterprises, policy-makers, and politicians – all of whom have important roles to play in supporting the growth of social enterprises.

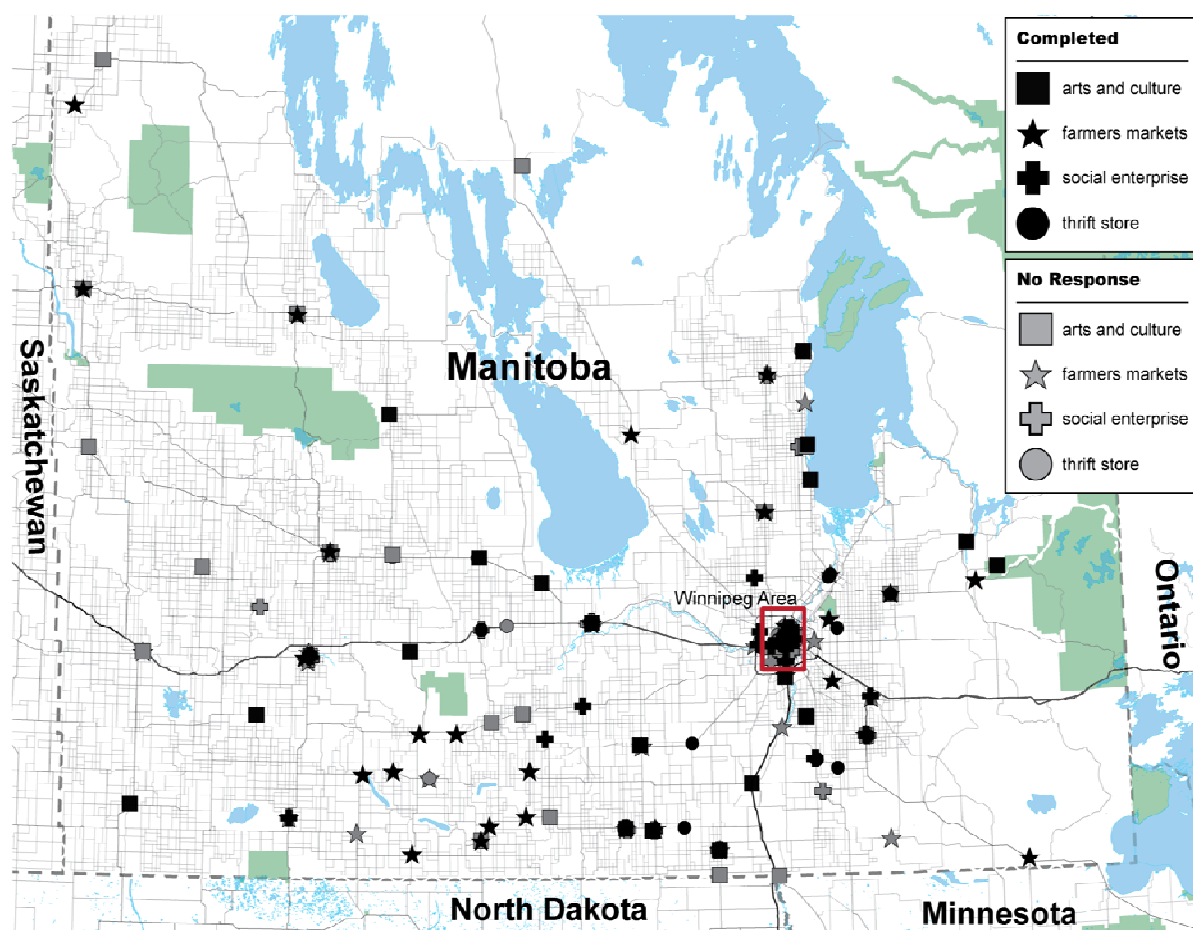
In the interim, we trust this report provides an important stepping-stone toward further research and investigation of social enterprises as catalysts of economic growth and promoters of social justice and sustainability.

APPENDIX A: Location Maps

M2: Social enterprise locations – Winnipeg



M3: Social enterprise locations – Southern Manitoba



APPENDIX B: Provincial Comparatives

As previously mentioned, this report has been completed as a part of a larger effort to measure the social enterprise sector across Canada. The research methods used in this study have already been applied in British Columbia and Alberta, with similar projects currently underway in Ontario and Atlantic Canada. While these additional projects will help strengthen our understanding of the pan-Canadian social enterprise sector, the data in the Alberta/British Columbia report already provides an opportunity to make provincial comparisons. The tables below offer a quick glimpse into the differences and similarities of social enterprises in Alberta, British Columbia and Manitoba.

Table 4: Key points of comparison - Province

	Alberta	British Columbia	Manitoba
Demographic profile			
Year of formation: median	1991.5	2000.0	1991.0
Year of first sale: median	1995.0	2002.0	1994.0
Number of business sectors (1-7): average	2.7	2.4	2.7
Number of targeted populations (0-16): average	4.6	5.2	3.8
Members: average in 2009/10	107.5	241.3	54.1
Trained: average for 2009/10	38.0	106.7	62.6
Employed (from target group): average for 2009/10	23.8	20.2	30.0
Served: average for 2009/10	10537.9	3828.8	4211.9
FTEs: average in 2009/10	29.8	9.4	15.8
Volunteers (full-and part-time): average in 2009/10	52.7	48.8	50.0
Total expenditure: average in 2009/10 *	\$1,966,100	\$479,100	\$501,700
Total wages and salaries: average in 2009/10 *	\$1,254,600	\$262,600	\$240,300
Total revenue: average in 2009/10 *	\$2,083,100	\$536,200	\$551,800
Revenue from sales of goods and services: avg. 2009/10 *	\$1,544,900	\$380,200	\$451,200
Revenue from grants, loans, donations: average 2009/10 *	\$490,750	\$103,700	\$89,300
Revenue exceeds expenses in 2009/10: percent	72.7%	74.7%	79.5%
Sales as percent of revenue: average per org 2009/10 *	51.7%	68.8%	64.0%
Revenue less grants/loans/donations exceeds expenses in 2009/10: percent	24.2%	32.1%	46.4%
Purpose (percent of social enterprises):			
Employment development, training and placement	22.2%	50.5%	29.7%
Income generation for parent organization	38.9%	47.0%	38.1%
Social mission	91.7%	70.3%	83.1%
Cultural mission	25.0%	34.7%	67.8%
Environmental mission	22.2%	37.6%	45.8%
Legal structure (percent of social enterprises):			
Non-profit legal structure	94.6%	78.6%	94.9%
Registered charity	54.1%	51.0%	54.3%

* Financial data is reported only for those social enterprises for which complete data were obtained.

Key points of comparison - Province (cont'd.)

	Alberta	British Columbia	Manitoba
Target groups (percent of social enterprises):			
All the people living in a particular place / community	45.9%	47.5%	82.2%
Aboriginal / Indigenous people	32.4%	41.6%	29.7%
Children	18.9%	24.8%	32.2%
Ethnic minority	21.6%	30.7%	26.3%
Families	21.6%	30.7%	31.4%
Homeless people	21.6%	19.8%	11.0%
Immigrants	24.3%	26.7%	22.9%
Men	32.4%	34.7%	19.5%
Lower income individuals	43.2%	48.5%	36.4%
People with mental disabilities	43.2%	38.6%	28.0%
People with employment barriers	32.4%	48.5%	22.0%
People with physical disabilities	32.4%	26.7%	21.2%
Refugees	18.9%	14.9%	9.3%
Senior / aged / elderly	35.1%	36.6%	29.7%
Women	27.0%	46.5%	24.6%
Youth / Young adults	40.5%	42.6%	39.0%
Non-profits, co-ops, social enterprises (intermediaries)	10.8%	5.9%	n/a
Sources of finance (percent of social enterprises):			
Foundations	42.9%	42.7%	27.3%
Government	68.6%	46.9%	59.5%
Private individuals, philanthropists, donors	54.3%	49.0%	40.5%
Bank	2.9%	5.2%	3.6%
Credit Union	5.7%	26.0%	6.4%
Community Futures	8.6%	1.0%	6.4%
Purpose of finance (percent of social enterprises):			
Technical assistance grants	25.7%	39.6%	9.1%
Operation grants	77.1%	58.3%	63.6%
Long-term loans / equity	0.0%	5.3%	2.7%
Short-term loans	0.0%	4.2%	1.8%

APPENDIX C: Key Points of Comparison by Location

Table 5: Key points of comparison - Location

Demographic Profile	Winnipeg	Non-Winnipeg	All
Year of formation: median	1990.0	1992.0	1991.0
Year of first sale: median	1999.0	1993.0	1994.0
Number of business sectors (1-7): average	2.8	2.4	2.7
Number of targeted populations (0-16): average	3.3	4.7	3.8
Members: average in 2010	41.3	76.6	54.1
Trained: average for 2010	128.3	27.9	62.6
Employed (from target group): average for 2010	65.3	10.4	30.0
Served: average for 2009	8667.4	1701.7	4211.8
FTEs: average in 2010	33.4	6.1	15.7
Volunteers (full-and part-time): average in 2010	32.4	88.4	51.0
Total expenditure: average in 2010 *	\$1,198,350	\$139,500	\$501,700
Total wages and salaries: average in 2010 *	\$561,100	\$73,400	\$240,250
Total revenue: average in 2010 *	\$1,277,000	\$174,675	\$551,700
Revenue sales of goods and services: avg. 2010 *	\$1,082,800	\$122,800	\$451,200
Revenue from grants, loans, donations: avg 2010 *	\$187,500	\$35,200	\$89,300
Revenue exceeds expenses in 2010: percent *	70.0%	84.5%	79.5%
Sales as percent of revenue: avg. per org. 2010 *	70.1%	60.9%	64.0%
Revenue less grants/loans/donations exceeds expenses in 2010: percent	52.7%	34.5%	46.4%
Purpose (percent of social enterprises):			
Employment development, training and placement	17.1%	52.4%	29.7%
Income generation for parent organization	40.8%	33.3%	38.1%
Social mission	86.8%	76.2%	83.1%
Cultural mission	61.8%	78.6%	67.8%
Environmental mission	52.6%	33.3%	45.8%
Legal structure (percent of social enterprises):			
Non-profit legal structure	94.7%	95.2%	94.9%
Registered charity	44.7%	72.5%	54.3%

* Financial data is reported only for those social enterprises for which complete data were obtained.

Key points of comparison - Location (cont'd)

	Winnipeg	Non-Winnipeg	All
Target groups (percent of social enterprises):			
All the people living in a particular place / community	71.4%	88.2%	82.2%
Aboriginal / Indigenous people	42.9%	22.4%	29.7%
Children	35.7%	30.3%	32.2%
Ethnic minority	40.5%	18.4%	26.3%
Families	21.4%	36.8%	31.4%
Homeless people	16.7%	7.9%	11.0%
Immigrants	31.0%	18.4%	22.9%
Men	21.4%	18.4%	19.5%
Lower income individuals	42.9%	32.9%	36.4%
People with mental disabilities	40.5%	21.1%	28.0%
People with employment barriers	40.5%	11.8%	22.0%
People with physical disabilities	23.8%	19.7%	21.2%
Refugees	19.0%	3.9%	9.3%
Senior / aged / elderly	16.7%	36.8%	29.7%
Women	31.0%	21.1%	24.6%
Youth / Young adults	47.6%	34.2%	39.0%
Sources of finance (percent of social enterprises):			
Foundations	36.8%	22.2%	27.3%
Government	65.8%	56.2%	59.5%
Private individuals, philanthropists, donors	42.1%	39.7%	40.5%
Bank	7.9%	1.4%	3.6%
Credit Union	13.2%	2.8%	6.4%
Community Futures	7.9%	5.6%	6.4%
Purpose of finance (percent of social enterprises):			
Technical assistance grants	7.9%	9.7%	9.1%
Operation grants	76.3%	56.9%	63.6%
Long-term loans / equity	5.3%	1.4%	2.7%
Short-term loans	2.6%	1.4%	1.8%

APPENDIX D: Key Points of Comparison by Purpose

Table 6: Key points of comparison - Purpose

	Mission-focused (cultural, environmental, social)	Income- focused	Multi-purpose (Employment focused + either a cultural, social or environmental focus)	All
Demographic profile				
Year of formation: median	1992.3	1991.0	1986.3	1991.0
Year of first sale: median	1992.8	1996.3	1987.5	1994.0
Number of business sectors (1-7): average	2.6	2.3	3.0	2.7
Number of targeted populations (0-16): average	3.0	3.8	4.8	3.8
Members: average in 2010	57.9	43.3	56.2	54.1
Trained: average for 2010	22.9	56.9	110.0	62.6
Employed (from target group): average for 2010	18.3	27.0	46.2	30.0
Served: average for 2010	5495.6	1592.5	4210.8	4211.8
FTEs: average in 2010	6.8	22.3	22.7	15.8
Volunteers (full-and part-time): average in 2010	54.4	37.5	48.8	51.0
Total expenditure: average in 2010 *	\$225,700	\$207,600	\$1,077,900	\$501,750
Total wages and salaries: average in 2010 *	\$104,500	\$103,500	\$517,900	\$240,250
Total revenue: average in 2010 *	\$235,200	\$254,750	\$1,183,561	\$551,800
Revenue from sales of goods and services: average 2010 *	\$150,700	\$139,700	\$1,072,100	\$451,200
Revenue from grants, loans, donations: average 2010 *	\$96,100	\$47,150	\$109,300	\$89,300
Revenue exceeds expenses in 2010: percent *	87.2%	90.9%	59.3%	79.5%
Sales as percent of revenue: average per organization 2009 *	54.5%	71.1%	71.3%	64.0%
Revenue less grants/loans/donations exceeds expenses in 2010: percent	48.6%	60.0%	33.3%	46.4%
Purpose (percent of social enterprises):				
Employment development, training and placement	11.9%	19.2%	73.2%	29.7%
Income generation for parent organization	0.0%	100.0%	46.3%	38.1%
Social mission	78.4%	76.9%	92.7%	83.1%
Cultural mission	82.4%	23.1%	78.0%	67.8%
Environmental mission	41.2%	38.5%	56.1%	45.8%
Legal structure (percent of social enterprises):				
Non-profit legal structure	94.1%	96.2%	95.1%	94.9%
Registered charity	41.2%	65.4%	64.1%	54.3%

* Financial data is reported only for those social enterprises for which complete data were obtained.

Key points of comparison - Purpose (cont'd.)

	Mission-focused (cultural, environmental, social)	Income- focused	Multi- purpose (Employment focused + either a cultural, social or environmental focus)	All
Target groups (percent of social enterprises):				
All the people living in a particular place / community	92.2%	76.9%	73.2%	82.2%
Aboriginal / Indigenous people	29.4%	23.1%	34.1%	29.7%
Children	35.3%	38.5%	24.2%	32.2%
Ethnic minority	21.6%	15.4%	39.0%	26.3%
Families	33.3%	30.8%	29.3%	31.4%
Homeless people	5.9%	11.6%	17.1%	11.0%
Immigrants	13.7%	23.1%	34.1%	22.9%
Men	15.7%	19.2%	24.4%	19.5%
Lower income individuals	21.6%	50.0%	46.3%	36.4%
People with mental disabilities	13.7%	34.6%	41.5%	28.0%
People with employment barriers	9.8%	15.4%	41.5%	22.0%
People with physical disabilities	15.7%	19.2%	29.3%	21.2%
Refugees	5.9%	3.8%	17.1%	9.3%
Senior / aged / elderly	27.5%	34.6%	29.3%	29.7%
Women	21.6%	19.2%	31.7%	24.6%
Youth / Young adults	33.3%	46.2%	41.5%	39.0%
Sources of finance (percent of social enterprises):				
Foundations	38.8%	12.5%	21.6%	27.3%
Government	72.0%	54.2%	45.9%	59.5%
Private individuals, philanthropists, donors	34.0%	58.3%	37.8%	40.5%
Bank	4.1%	4.2%	2.7%	3.6%
Credit Union	10.2%	4.2%	2.7%	6.4%
Community Futures	6.1%	8.3%	5.4%	6.4%
Purpose of finance (percent of social enterprises):				
Technical assistance grants	12.2%	4.2%	8.1%	9.1%
Operation grants	73.5%	66.7%	48.6%	63.6%
Long-term loans / equity	2.0%	0.0%	5.4%	2.7%
Short-term loans	2.0%	4.2%	0.0%	1.8%

APPENDIX E: Survey Questionnaire

MANITOBA SOCIAL ENTERPRISE STUDY, 2011

To be completed by Research Team:

Name of interviewer/contact:

Date of completion (day/month)

Completion mode (circle one): In person interview / Telephone interview / Self-completion

Organization name:

Organization survey number:

Organization mailing address:

Postal code:

Organization phone number:

Organization contact email:

To be completed by the respondent (or read to the respondent if a telephone interview): This research project is being conducted by Dr Peter Hall (Simon Fraser University), Dr Peter Elson (Mount Royal University), Brendan Reimer (CCEDNet Manitoba) and their research assistants, under the auspices of the SSHRC-funded Research Alliance, "The Social Economy in BC and Alberta: Strengthening the Foundations for Growth", widely known as BALTA. The goal of this survey is to support the sector by creating clear indicators of the nature, scope and socio-economic contribution of social enterprises in Manitoba.

Your participation in this survey is entirely voluntary. It is assumed that you have the authority to answer the questionnaire on behalf of your social enterprise. Ideally, we would like you to answer all questions, but please feel free to decline any or all questions you would rather not answer. No risks to participating in this survey are anticipated, while the social enterprise sector broadly will benefit from the study. Your name will be kept confidential, as will the individual answers you provide. However, we cannot guarantee the confidentiality of questionnaires submitted by email. Your answers will be combined with those provided by other respondents, and analyzed by the research team. The original questionnaires will be held in locked cabinets in our university offices until the end of 2015, and then destroyed. An electronic version of the data will be available only to the research team on secure computers. The final report may be placed on the BALTA and CCEDNet Manitoba websites and may be used in promotional and educational materials, and policy-related initiatives. We will send you an email informing you of the release of the report. You will also be able to obtain a copy of the report by contacting the CCEDNet Regional Coordinator, Brendan Reimer at breimer@ccednet-rcdec.ca. The research will be completed by August 2011.

If you have any questions please contact Brendan Reimer at 204-927-3203 breimer@ccednet-rcdec.ca or Dr Peter Hall at 778-782-6691 or pyhall@sfu.ca or Dr Peter Elson at 403-440-8722 or pelson@mtroyal.ca. The research has been reviewed and approved by the SFU Office of Research Ethics (ORE ref 2011s0245) and the MRU Human Research Ethics Board (HREB). You may address any concerns or complaints to Dr. Hal Weinberg, Director, SFU ORE at hal_weinberg@sfu.ca or 778-782-6593, or to Dr. Michelle Yeo, Chair HREB, MRU (403)440-6494 or hreb_chair@mtroyal.ca.

I agree, of my own free will, to participate in this questionnaire survey for the Manitoba Social Enterprise Study, 2011 (please check). ☐ YES ☐ NO

Measuring the Social Enterprise Sector in Manitoba

This is a survey of social enterprises in Manitoba. 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 circle or check the appropriate box on the right hand side of each question, or insert dates, numbers, amounts or text as requested.

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 *MISSION* or *PURPOSE* of your Social Enterprise? Please check ALL that apply

Employment development, training, and placement	
Income generation for parent organization	
Social mission	
Cultural mission	
Environmental mission	

2.1 In your own words, what is the PRIMARY *MISSION* or *PURPOSE* of your social enterprise?

3. Does your social enterprise have a membership base?

Yes	
No	

3.1 If yes, how many members do you have?:

4. What is the legal structure of your social enterprise? Please check ALL that apply

Non-Profit	
Cooperative	
For Profit	
Other, please specify:	

5. Is your social enterprise a registered charity with the Canada Revenue Agency?

Yes	
No	

6. Do you have a parent organization?

Yes	
No	

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 arms-length from the parent	

7. 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	
City / town	
Region (county / regional district)	
Province	
National (other parts of Canada)	
International	
Other, please specify:	

8. In which business sectors does your social enterprise sell products and/or services?
Please check ALL that apply.

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

9. 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:

All the people living in a particular place / community	
Aboriginal / indigenous people	
Children	
Ethnic group / minority	
Family	
Homeless persons	
Immigrants (including temporary workers, permanent residents, etc)	
Men	
Lower income individuals	
People with mental disabilities, including addictions	
People with employment barriers	
People with physical disabilities	
Refugees	
Senior / aged / elderly	
Women	
Youth / young adults / students	
Other, please specify:	

9.1 From the groups listed above, in 2010...

- how many people did you train?
- how many people did you employ?
- how many people did you provide services to?

	Number in 2010
Trained	
Employed	
Provide 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 business customers of your social enterprise.

10. How many people were employed or volunteering at your social enterprise during 2010? Estimated totals are acceptable. Please include those who you employ as part of your mission:

	Total number employed / volunteering in 2010
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. We would like to know about the revenue and expenses in 2010 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.

	2010
Total expenses on all items of the social enterprise including wages/salaries	\$
Total wages and salaries paid, including those trained	\$
Total revenue from all sources of the social enterprise including sales/grants/etc	\$
Total revenue from sales of goods and services, Including service contracts with government	\$
Total revenue from grants, loans, and donations	\$

11.1 What were the sources of grants, loans and donations received in 2010?
Please check all that apply:

Foundations	
Government	
Private individuals, philanthropists, donors	
Bank	
Credit Union	
Community Futures	
Other, please specify:	

11.2 What were the purposes of grants, loans and donations received in 2010?
Please check all that apply:

Technical assistance grants	
Operational grants	
Long-term loans / equity	
Short-term loans	
Other, please specify:	

**THANK YOU FOR YOUR PARTICIPATION.
IF SELF-COMPLETED, PLEASE RETURN TO:**

MAIL (Brendan Reimer, 309-323 Portage Ave, Winnipeg, MB, R3B 2C1),
EMAIL (breimer@ccednet-rcdec.ca)
OR FAX (204-927-3201)

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NOTES



[www. http://www.ccednet-rcdec.ca/en/regional_networks/manitoba](http://www.ccednet-rcdec.ca/en/regional_networks/manitoba)

www.mtroyal.ca/nonprofitinstitute