

BALTA Social Economy Survey Phase 1 Draft Survey

Welcome to the BC–Alberta Social Economy Survey!

This survey is part of BALTA's "Mapping the Social Economy" project, designed to capture the scope and characteristics of the social economy in BC and Alberta.

The purpose of the mapping project is to identify and characterize social economy organizations (including social enterprises, non-profits, co-operatives, etc.) that are contributing to the social economy sector in both BC and Alberta. Through this research we will compile a comprehensive inventory of social economy organizations and actors that will be available for various analytic and research purposes, will profile the social economy sector with government and the public, and will provide valuable information to practitioners, academics and policy makers with the aim to strengthen the social economy in western Canada.

Thank you for your participation.

The survey should take approximately 10-15 minutes to complete.

Reminder: you will need your organization's financial statements from the past year in order to complete the survey.

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Participant Consent

The BALTA Social Economy Survey is housed on a secure website. All information provided will be kept strictly confidential and transferred to a database maintained at Athabasca University in Alberta. Access to survey information will be restricted to BALTA partners for research purposes only. At no time will any specific information be attributed to any individual or organization unless your permission has been obtained beforehand. All data will be securely and confidentially held for 3 years after the completion of the project.

All information collected in this questionnaire is protected by the provisions of the FOIP (Freedom of Information and Protection of Privacy) Act.

If you have any questions about the BALTA Social Economy Survey or would like further information, please contact:

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Copies of all research reports will be published and housed with BALTA. You can obtain a copy of the survey results or any reports by contacting the BALTA Project Coordinator, Stuart Wulff at: swulff@uniserve.com or 250.723.2296.

You are not compelled to participate in this research project. Participation is voluntary and you are free to withdraw from participation at any time without prejudice. If you choose not to participate in this research project, this information will also be maintained in confidence. Not all questions may apply to your organizations and you may also choose to leave any particular question unanswered for any reason. By filling out this survey, you are agreeing to participate. If you have any concerns or complaints please contact Dr. Hal Weinberg, Director, Office of Research Ethics at hal_weinberg@sfu.ca or 778.782.6593.

I have read the above information and consent to participate in the BALTA Social Economy Survey.

- I agree
 I do not agree

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1. Name of Organization

2. Name of Contact Person (and position within the organization)

(Name)-----

(Position)-----

3. Email Address

4. Mailing Address

Postal code* ----- (Format: V5H2K7) *required

5. Telephone Number

(___) - (___-____) ext (____)

6. Incorporation/Constitution year -----

7. Organization's Web Page Address ----- (URL ex.:
www.organization.ca)

8. a) Does your organization have more than one establishment in Alberta and/or BC?

Note: The **establishment** is an organizational unit (like a main office, branch or regional office) for which distinct financial statements are held.

Yes No

Is yes, how many? ___

b) What geographic area does your establishment serve? (check all that apply)

neighbourhood/local community

city/town

region (county/regional district)

province

national

international

non applicable

Other (please specify)

If you selected other, please specify:

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9. Does your establishment have a membership base?

Yes No

If yes, how many members do you have? _____

10. How many persons are on your organization's board of directors?

Total _____ (Please enter numeric value only)

Women _____ (Please enter numeric value only)

11. What is the legal form of your establishment/organization? (check all that apply)

- not-for-profit organization
- not-for-profit corporation
- foundation
- society
- co-operative
- association
- for profit organization/corporation
- Other (please specify)

If you selected other, please specify

12. a) Please identify the sector(s) that your establishment works in:
(check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> agriculture, forestry, fishing, mining | <input type="checkbox"/> social services |
| <input type="checkbox"/> recreation / tourism | <input type="checkbox"/> arts and culture |
| <input type="checkbox"/> manufacturing | <input type="checkbox"/> communications |
| <input type="checkbox"/> construction | <input type="checkbox"/> professional services |
| <input type="checkbox"/> retail sales | <input type="checkbox"/> technical / scientific services |
| <input type="checkbox"/> wholesale sales | <input type="checkbox"/> training |
| <input type="checkbox"/> transportation / storage | <input type="checkbox"/> administrative services |
| <input type="checkbox"/> finance and/or insurance | <input type="checkbox"/> waste management |
| <input type="checkbox"/> real estate | <input type="checkbox"/> teaching / education |
| <input type="checkbox"/> catering/hosting | <input type="checkbox"/> public services |
| <input type="checkbox"/> health | <input type="checkbox"/> Other (please specify) |

If you selected other, please specify:

b) Of the above please specify the primary sector of your establishment:
[in drop down menu select the primary category from above]

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13. a) Does your establishment have an explicitly stated social purpose/mission?

Yes No

b) If yes, please identify the categories that apply best to your establishment's social mission or scope of activities.

- | | |
|--|--|
| <input type="checkbox"/> Human rights | <input type="checkbox"/> Women |
| <input type="checkbox"/> Education | <input type="checkbox"/> Unemployed persons |
| <input type="checkbox"/> Health | <input type="checkbox"/> Homeless persons |
| <input type="checkbox"/> Basic needs provision
(clothes, food, shelter, etc.) | <input type="checkbox"/> Persons with disabilities |
| <input type="checkbox"/> Housing | <input type="checkbox"/> Lower income individuals |
| <input type="checkbox"/> Legal/financial services | <input type="checkbox"/> Persons with mental illness |
| <input type="checkbox"/> Family services | <input type="checkbox"/> Refugees |
| <input type="checkbox"/> Fair trade | <input type="checkbox"/> Ethnic communities |
| <input type="checkbox"/> Children/Youth | <input type="checkbox"/> Indigenous People |
| <input type="checkbox"/> Elderly persons | <input type="checkbox"/> General community |
| | <input type="checkbox"/> Other (please specify) |

If you selected other, please specify

c) Of the above please specify the **primary** category:
[in drop down menu select primary category from above]

14. a) Does your establishment have an explicitly stated environmental purpose/mission?

Yes No

b) If yes, please identify the categories that apply best to your establishment's environmental mission or scope of activities.

- | | |
|--|---|
| <input type="checkbox"/> Conservation and Protection | <input type="checkbox"/> Research/Independent Science |
| <input type="checkbox"/> Alternative energy | <input type="checkbox"/> Legal/Financial services |
| <input type="checkbox"/> Resource management | <input type="checkbox"/> Agriculture and food |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Alternative/Sustainable business practices |
| <input type="checkbox"/> Waste management/recycling | <input type="checkbox"/> Ecolabeling/Auditing/Monitoring |
| <input type="checkbox"/> Pollution prevention | <input type="checkbox"/> Health |
| <input type="checkbox"/> Climate change | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Green building/Architecture | |

If you selected other, please specify:

c) Of the above please specify the **primary** category:
[in drop down menu select category from above]

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The following questions concern your establishment only and refer to your last financial year (the twelve-month economic cycle for which your financial statements are held).

15. Please indicate the number of employees within your establishment during the last financial year.

Full-time and part-time employees refer to all persons receiving pay for services rendered in Canada or for paid absence, and for whom the employer is required to complete a Revenue Canada T-4 Supplementary Form.

Freelancers include all persons for which the employer is required to complete a Revenue Canada T-4 Supplementary Form. However, employees working subcontractors are not considered freelancers. Contract workers are individuals that are not listed on your payroll and have been hired temporarily, for a precise project or term.

Seasonal workers are employees that have worked 30 hours or more per week, for more than 2 weeks but less than 8 months.

Volunteers are individuals offering a service without payment.

Full time employees (30 hours or more per week)	----
Part time employees (Less than 30 hours per week)	----
Seasonal employees	----
Freelancers and contract workers	----
Volunteers (excluding the ones on your board of directors)	----

16. Does your establishment employ specific target groups (or intended beneficiaries) such as persons with disabilities, homeless people, women, persons with mental illness, ethnic communities?

Yes ---- No ----

If yes, how many? ___

How many are women? ___

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16. Does your organization earn some of its income through a market-based or business activity (i.e. through the provision of goods and/or services)?

Yes No

If yes, please describe

17. a) Does your organization offer/provide support to other organizations?

Yes No

b) If yes, please indicate the type of support activity your organization provides: (check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> technical | <input type="checkbox"/> research and education |
| <input type="checkbox"/> financial | <input type="checkbox"/> advocacy and promotion |
| <input type="checkbox"/> training | <input type="checkbox"/> networking |
| <input type="checkbox"/> capacity building | <input type="checkbox"/> enterprise development |
| <input type="checkbox"/> organizational development | <input type="checkbox"/> other (please specify) |

If you selected other, please specify:

18. Typically, if your organization generates a financial surplus or profit, how does it distribute most of the surplus earned? (check all that apply)

- ___ distributed to individual members
- ___ invested back into the organization
- ___ donated to other community organizations
- ___ held in reserve for community benefit / community trust
- ___ other (please specify)

If you selected other, please specify:

19. What was your actual operating budget and actual capital budget for the last full accounting year?

Actual Operating Budget: \$_____ (Please enter the rounded dollar amount, no periods and commas e.g. 265540)

Actual Capital Budget: \$_____ (Please enter the rounded dollar amount, no periods and commas e.g. 265540)

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20. For the last fiscal year, please indicate your organization's total revenues from the following areas (approximate values if exact figures are not available):
Please enter the rounded dollar amount, no periods and commas.

A service contract is a payment made to the establishment by the government or municipality for goods sold or services rendered.

Sales of goods or services means other than service contract with government.

Government grants	\$_____
Loans	\$_____
Service contracts	\$_____
Sale of goods/services	\$_____
Donations	\$_____
Investments	\$_____
Endowments	\$_____
Membership/Subscriptions	\$_____
Foundation grants	\$_____
Corporate sponsorship	\$_____
Utilities/Crown corporations	\$_____
Anomalies/	
Outstanding revenues	\$_____
Other	\$_____

Other (please specify the revenue area): _____

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A Few Final Questions...

21. Are you a member of any networks, associations or umbrella groups?

Yes No

If yes, please name them:

22. Please list other social economy organizations that you interact with (if you interact with multiple organizations please name the three most frequent):

23. Would your organization be interested in receiving a copy of the results from this study?

Yes No

24. Would your organization be willing to participate in a follow up interview/survey?

Yes No

25. We have been considering to compile a searchable directory of social economy organizations in BC and Alberta in a future project. Would such a tool be useful for you and would you be interested in participating?

Yes No

26. Please use the space below if you would like to add any further comments:

Thank you for your participation!

Please encourage any of your fellow social economy organizations to fill out the survey. If they have not already heard about this survey, you can send them to <http://www.socialeconomy-bcalberta.ca/mapping.html>