

MONEY & MISSION

SOCIAL ENTERPRISE IN CALGARY

**An Environmental Scan & Readiness
of Calgary & Area Social Enterprise Activity**



Sharilyn Amy
Go-To Group, Inc.
Creating Collaborative Futures...
www.go-to-group.com
403.585.6876

Study Purpose



- Increase understanding of current social enterprise and earned income activity
- Enhance ability to support innovation, act upon opportunity & collaborate
- Emphasis on the human service non-profit sector



Research Opportunity

The research provided an opportunity to:

- **Analyze and better understand the current state**
- **Develop an inventory of SE and proponents**
- **Stimulate discussion regarding role of SE in the sector**
- **Implement an SE definition and test our theoretical understanding**
- **Identify SE sector support requirements and readiness**

... an enterprise, organization or venture that advances its social mission through earned income strategies

Research Question & Objectives

“What is the state of Social Enterprise activity in Calgary?”

- To develop an inventory of Calgary’s current SE activity**
- To determine “readiness” for SE development through an assessment of interest, awareness and understanding within human service agencies**
- To provide shared understanding and a foundation of information that supports decision making between project sponsors**

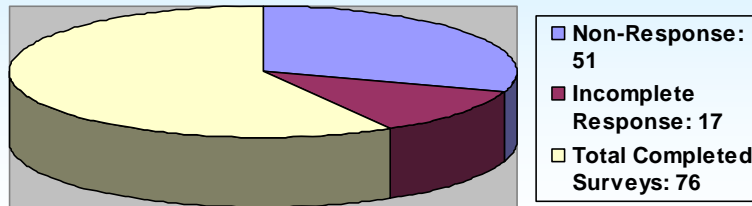
*... capture data to support analysis of activity and sector readiness
for additional support*

Research Design & Methodology

- **Quantitative & Qualitative Measures**
 - **E-survey, Sample Design: entire population of human service non profits currently supported (RR: 76 agencies or 53%)**
 - **Interviews, Nonprofit Entrepreneurs / Capacity Builders / Community Leaders (45 in total)**
 - **Secondary Research**
 - **Limitations of the Study: auspices & social desirability bias**
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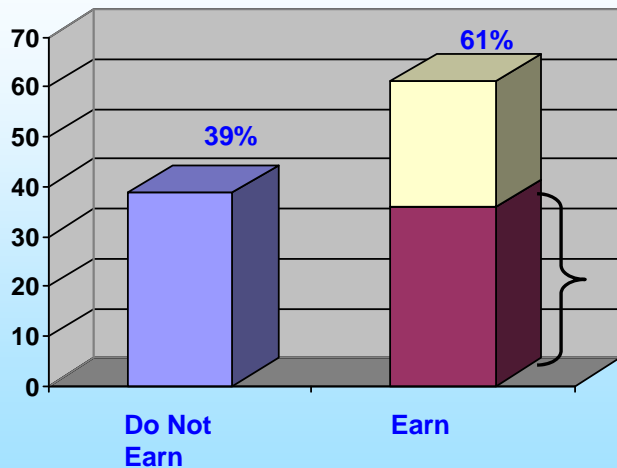
Survey Response

Survey Response Rate



- **53% Response Rate**
- **56% Agency Budget > \$1M**
- **61% Earn Money**
- **60% Self Identify as a Social Enterprise**

Percentage of Agencies that Earn Income from the Marketplace



60% consider the activity a social enterprise

Survey Results: Activity

Duplication with capacity

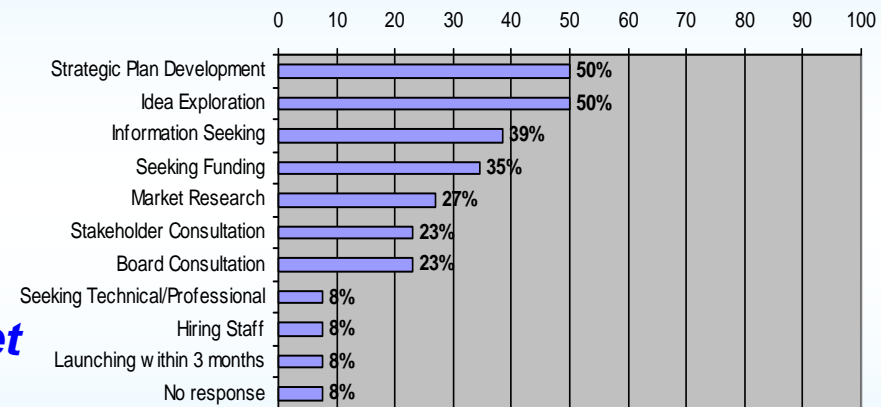
Stability with 72% growing or mature

Value – earning expectations often met

Motivation – 76% of income from market

Opportunity – 31% are planning

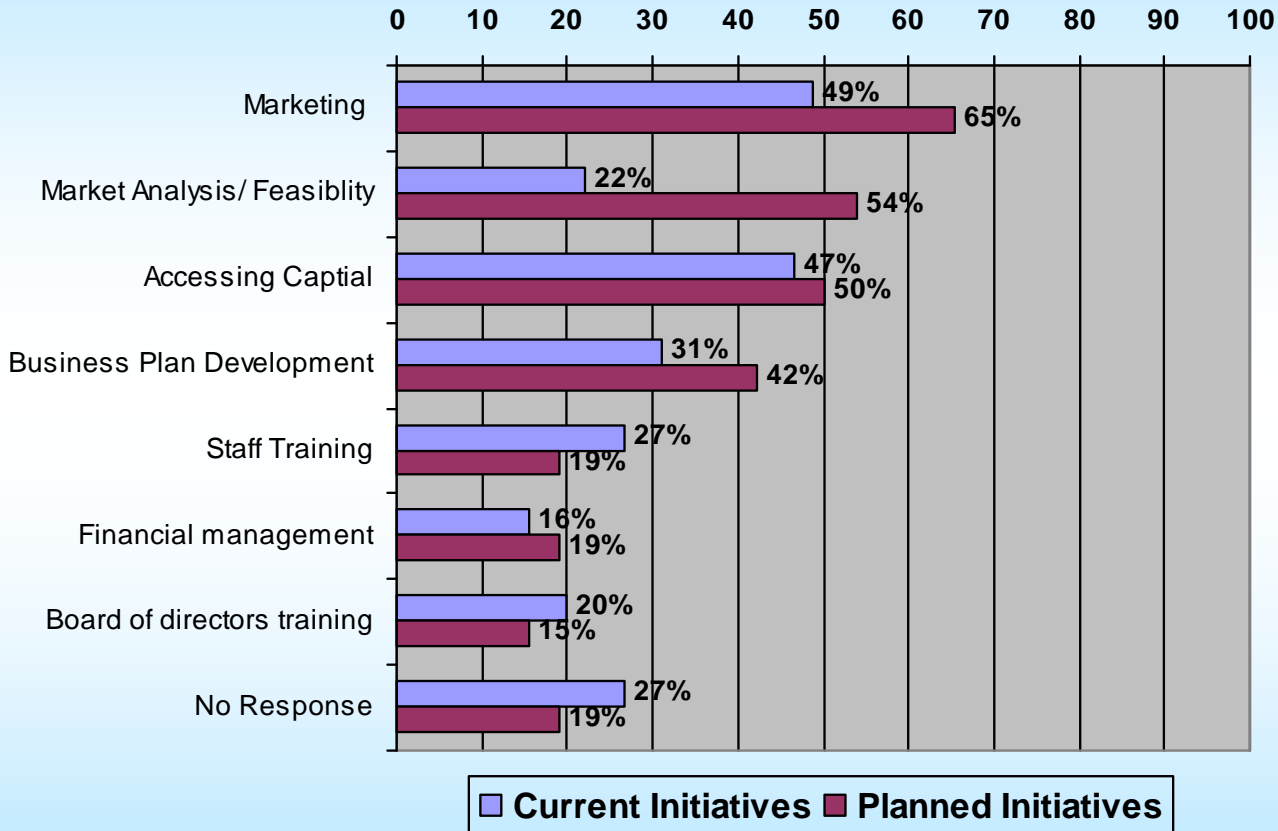
Stage of Pre-Implementation Frequency By Percentage



...85% would access a social enterprise fund

Survey Results: Need

Support Requested by Current and Planned Initiatives



...capacity building support through technical assistance & capital

Interview Findings: Non-profit Entrepreneurs (9)

“When I describe to others what we do, I tell them that we run a ***Profit with Purpose*** business – and they understand right away what our venture is about.”

- **Social enterprise activity supports agency sustainability & program delivery**
- **Balance challenge**
- **Significant time to establish**

Needs:

- **Advocacy, Networking & Awareness**
- **Business Skills Training**
- **Seed Capital & Grants**

Valuable Tool

...success is not just based on breaking even or earning surplus, but seen when some costs covered to support program innovation

Interview Findings: Capacity Builders (18)

“The social enterprise sector requires *more than just access to funds* if we want to see it grow and flourish.”

- **Capacity building to assess venture**
- **Similarities to mainstream ventures**
- **Skills of participants, capital, balance & nimbleness critical**

Needs:

- **Centralized Resources**
- **Access to Capital & Advice**
- **Focus on Risk Alleviation for sector**

Support = Reduced Risk

...integrate activity into the system available to support small business to the extent possible – recognizing unique needs

Interview Findings: Community Leaders (18)

Even given the risks, the majority were enthusiastic for social enterprise as an innovative approach to social services delivery that supports long term sector sustainability.

- **Have “skin in the game”**
- **Individualize support, not “cookie cutter”**
- **Attracts young, vibrant business leaders**

Needs:

- **Incubation Advice & Mentorship**
- **Directed by Participants**
- **Longer-term Horizon**
- **System Integration**

Make Winners

...tailor support, link proven business skills to planning stage to alleviate sector risk, create success with the ventures supported

Interview Participants

Bruce Alger

Alger and Associates

Tracey Arnett

Alberta Women Entrepreneurs

Susan Bedard

Ontario Trillium Foundation

Judy Birdsell

OMH Consulting

Steve Brown

Business Development Canada

Anna Bubel

Another Way

Lin Bui

Marichu Antonio

Sherry Choma

Ethnicity Catering

Dixie Cameron

Fireworks Cooperative

Beth Coates

Canadian Alternative Investment
Cooperative

Alderman Joe Connelly

City of Calgary

Martin Garber-Conrad

The Edmonton Foundation

Dani Deboice

First Calgary Savings

Mike Lickers

Ghost River Rediscovery

Andrew McLaughlin

Michael O'Reilly

Habitat for Humanity

Gerrad Oishi

Strafford Foundation Chair

Cathy Pearl

Jacqueline Powell

Ontario Trillium Foundation

Geoff Pradella

Calgary Chamber of Commerce

Steve Savidant

Oil and Gas Entrepreneur

Alderman Druh Farrell

City of Calgary

Sherry Ferronato

The Calgary Foundation Grants
Committee

Charlie Fischer**Jim Gray**

Cheryl Hamelin

University of Calgary

Alderman Bob Hawkesworth

City of Calgary

Dr. Tessa Hebb

CEDTAP

Walter Hossli

Lisa Caton

Momentum

Jenny Kain

Bob Marvin

City of Edmonton

Ann-Marie Latoski

VRRl

Janet Lavoie

Calgary Chamber of Voluntary
Organizations

John Leishman

Geeks on the Way

David LePage

Enterprising Non Profits

Alderman Jim Stevenson

City of Calgary

Bill Storey

Meals on Wheels

Corrine Tessier

Affirming Workplace Solutions

Don Thurston

The Calgary Foundation Board

Burke Vindevoghel

The Business *Link*

Bob Ward

Omar Yaqub

SEF Edmonton

Brett Wilson

Creating Action

- **Prepare resources for action in advance**
- **Determine key stakeholders for the findings**
- **Create materials that meet communications needs**
- **Update leadership regarding the project**
- **Advocate for your organization to take a “point-of-view” based on the findings**
- **Establish a plan to extend that POV into the community (via face-to-face meetings with key donors, events, etc.)**