



The BC-Alberta Social Economy Research Alliance

***Strength, Size, Scope:***  
**A Survey of Social Enterprises**  
**in Alberta and British Columbia**

**BALTA Project C16**

**Prepared by**

**Peter R. Elson, Mount Royal University**  
**Peter V. Hall, Simon Fraser University**

**With the assistance of:**

**Jeremy Arbuthnot**

**Jessica Baas**

**Tom Nelson**

**Samantha Sadler**



Bissett School  
of Business



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THINKING OF THE WORLD

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For further information, contact the BC-Alberta Social Economy Research Alliance, PO Box 1161, Port Alberni, BC, V9Y 7M1, (tel) 250-723-2296

Website: [www.socialeconomy-bcalberta.ca](http://www.socialeconomy-bcalberta.ca)

Email: [balta@explornet.com](mailto:balta@explornet.com)

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We were greatly assisted in our efforts to identify social enterprises, and thus increase the response rate, by Enterprising Nonprofits (ENP) in British Columbia, and by the Calgary Foundation and the Edmonton Community Foundation in Alberta.

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### **Author Information**

Peter R. Elson is the Senior Research Associate in the Institute for Nonprofit Studies, Mount Royal University. [pelson@mtroyal.ca](mailto:pelson@mtroyal.ca)

Peter Hall is Associate Professor in the Urban Studies Program, Simon Fraser University at Harbour Centre. [pyhall@sfu.ca](mailto:pyhall@sfu.ca)

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## Social Enterprises in Alberta and British Columbia

### Introduction

Social enterprises are emerging as both an identifiable and viable organizational form capable of providing goods and services in the marketplace and motivated by a clear social, cultural, environmental or employment mission. Yet their actual value and contribution defies easy quantification: how do we determine the employment contribution of a fair-trade marketing and distribution intermediary that employs perhaps one full-time worker, but whose services shift large numbers of peasant- or home-based producers from poverty to self-sufficiency? What is the value of the unpaid (voluntary?) work within a social enterprise that motivates someone recovering from substance abuse toward potential fulltime paid employment?

As researchers working in the context of the broader social economy, we wanted to learn more about social enterprises in British Columbia and Alberta, i.e., where they operate, what they hope to achieve, and how they chose to operate in the market. This report is the first attempt to literally and figuratively map the location, purpose and operations of social enterprises in the two provinces. We certainly hope it will not be the last as social enterprises are just beginning to make their presence felt.

This project surveyed social enterprises in British Columbia and Alberta in the spring of 2010 with the goal of developing 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 respondents were asked to report on their 2009 year-end financial period.

Project implementation was in three phases. In phase one, the structure and content of the mapping instrument was developed and tested. Existing social economy networks were also identified and invited to contribute names and contact information to the survey sample frame, and in turn, would benefit from its results. In phase two, the survey was circulated to all social enterprises on the sample frame to achieve a large and fully representative sample of social enterprises in the two provinces. Data was subsequently collected for entry and analysis. This report marks phase three, the circulation of the survey results to social enterprise-related networks in both provinces through both participant feedback and de-briefing workshops.

To ensure confidence in a representative sample, we developed a list (or what is technically referred to as a sample frame) of known Alberta- and British Columbia-based social enterprises and enterprising nonprofits. Any social enterprise included in our sample had to meet the dual criteria of being a business venture that sells goods and services, and that does so primarily to fulfill its social and/or environmental mission. A further selection criterion that we included in our sample frame required the social enterprise, when possible, to be independently verified as a social enterprise.

Thus, our goal was to collect a representative sample large enough for statistical analysis from a list of known social enterprises in BC and Alberta that not only trade in goods and services to fulfill their social/environmental goals, but are also recognized as such by others in their context of operation.

We were greatly assisted in our efforts to identify social enterprises, and thus increase the response rate, by Enterprising Nonprofits (ENP) in British Columbia, and by the Calgary Foundation and the Edmonton Community Foundation in Alberta. Each organization provided a letter of support to accompany the questionnaire that could be sent to potential respondents.

### **What is a social enterprise?**

In this study, a social enterprise (SE) is defined as 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; financial, social, environmental, and cultural.

This survey represents the first profile of social enterprises in BC and Alberta. Social enterprises work in communities to fulfill training, income, social, cultural, and environmental missions. A further selection criterion included that the social enterprise must, when possible, be independently verified as a social enterprise.

## Summary: What we now know

The results of this survey are reported with much caution. The one hundred and forty respondents represented almost a 50 percent response rate. We can say much about the social enterprises we heard from. We also know where the non-responsive social enterprises are located. But, given the current state of knowledge regarding social enterprises, we can't assert 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. What we can say is a general picture is revealed of what the whole may look like.

### **Social Enterprises in BC and Alberta**

Of 295 confirmed social enterprises, 231 are in BC and 64 are in Alberta. We surveyed 140 of these social enterprises, 35 in Alberta and 105 in BC. Responding social enterprises in Alberta are generally older (average of 24 years) and larger than those in BC (average age of 15 years). This reflects the emergence of, and institutional support for, a new generation of social enterprises in BC.

Social enterprises exist for a variety of purposes:

- 51% of social enterprises in BC and 22% in Alberta provide employment development, training and placement support.

- 47% of social enterprises in BC and 39% in Alberta generate income for a parent organization. Social enterprises in suburbs of major cities are especially active in this arena.
- 71% of social enterprises in BC and 92% in Alberta operate to fulfill a social mission.
- 35% of social enterprises in BC and 25% in Alberta operate to fulfill a cultural mission. Small town / rural social enterprises are especially active in this arena.
- 38% of social enterprises in BC and 22% in Alberta operate to fulfill an environmental mission.

Two-thirds of social enterprises in both provinces sell goods or services across multiple sectors, and two-thirds serve multiple populations. Social enterprises tend to gravitate toward servicing low income individuals, people with mental disabilities, people experiencing employment barriers, women, and youth.

Social enterprises engage people in multiple ways, unlike the employee and client relationships in a traditional business. The same individual may have multiple, intersecting connections to a social enterprise, as member, recipient of training, employment and services, employee or volunteer. In 2009:

- Social enterprises in BC averaged 241 members, in Alberta an average of 107 members. Overall, the responding social enterprises in the two provinces totaled 27,870 members; 23,890 in BC and 3,980 in Alberta.

- Social enterprises provided paid employment for a total of 4,500 people in 2009; approximately 3,000 in BC and 1,500 in Alberta. Fulltime, part-time, seasonal and contract workers, together earned in excess of \$63 million in wages and salaries. Fulltime, part-time and seasonal workers represented an estimated 2,010 fulltime equivalent employees.
- Sixty percent of those 4,500 employed workers (2,700 people -1,940 in BC and 760 in Alberta) are employed directly because of the mission of the social enterprise (e.g. people with disabilities and/or other employment barriers) .
- Social enterprises also involved 6,780 full- and part-time volunteers (4,880 in BC and 1,900 in Alberta).
- Social enterprises also provided training to 11,670 people (10,450 in BC and 1,220 in Alberta) and provided services to more than 678,000 people.

Financial results:

- Total revenue for responding social enterprises in 2009 was at least \$113 million (\$46m in BC and \$67m in Alberta). This includes sales of \$78 million (\$29m in BC and \$49m in Alberta).
- Sales accounted for an average of 63.6% of total revenue per social enterprise.
- In 2009, three-quarters of all social enterprises generated more revenue than expenses, resulting in aggregate net profits of \$7.9 million (\$4.1m in BC and \$3.7m in Alberta).

- In financial terms, social enterprises in Alberta are larger than those in British Columbia, averaging slightly more than \$2m (vs \$536,000 in BC) in total revenues, \$1.5m (vs \$380,000 in BC) in sales, and \$117,000 (vs \$57,000 in BC) in net profits.

Finance and support:

- The main sources of financing for social enterprises in BC were foundations, government, individual donors and technical assistance grants. In Alberta, the main sources of financing were foundations, government and individual donors.
- ENP, based in Vancouver, was a direct funder of 48%, and an indirect supporter (typically of a parent non-profit) of 7% of the responding social enterprises in BC.

The location pattern of social enterprises is revealing:

- Social enterprises are present throughout both provinces, but reflecting the distribution of population needs and market opportunities, they are geographically concentrated. More than half of respondents were located in Edmonton, Calgary or Vancouver and the BC Lower Mainland.
- Social enterprises in small towns and rural areas are smaller than those in major urban centres and are more diverse in their activities.
- The largest social enterprises in terms of employees and revenue are more common in suburban locations of major cities. Often these organizations have a clear income-generation mandate for their parent non-profit.

- Social enterprises in core areas of major cities are surprisingly diverse. Some are more like their large suburban counterparts, often with a national and international mandate. Others are more like those found in small towns and rural areas; smaller but with diverse activities that engage members of specific communities, such as aboriginal and homeless populations.

In 2009, the 140 social enterprises that responded to the survey generated at least \$113 million in revenues, including at least \$78 million in sales. They paid \$63 million in wages and salaries to almost 4,500 people, of whom 2,700 were employed as part of the mission of the organization. They also trained 11,670 people, provided services to over 678,000, and involved 6,780 volunteers.

## Data Notes and Methodology

Given the objectives of the study – to generate widely intelligible and comparable quantitative indicators of the impact of social enterprise activity in British Columbia and Alberta – we opted for a sample survey method using a short and highly standardized questionnaire, designed for easy completion and return in order to achieve a high response rate.

Best efforts were made to create a sample frame that included all social enterprises in BC and AB, and to collect data from a representative sample of this population. Sources used to identify verifiable or potential social enterprises include:

- BC, primarily a list created by ENP
- AB, advice from persons knowledgeable about the social enterprise sector (e.g., ENP, Edmonton Community Foundation, Calgary Foundation)
- *Also supplemented by the following:*
  - Mapping Project<sup>1</sup> respondents that self-reported fitting our selection criteria
  - Further classification of the master list from Mapping Project (including non-respondents sorted into classes such as foundations, co-ops, societies, etc.) and included those organizations from the classes that were likely valid social enterprises (e.g., farmers' markets)

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<sup>1</sup> The Mapping Project is another research project of the BALTA partnership which attempts to capture the size, geographic scale, scope and characteristics of all the organizations in the social economy in BC and Alberta, including social enterprises. The mapping project consists of an online survey completed by any social economy organization (social enterprises as well as cooperatives, non-profits, societies, associations, and others) on a self-selection basis. For more information, see <http://www.socialeconomy-bcalberta.ca/research/mapping.php>.



- Supplemented the list (e.g., farmers' markets) when the smaller list could be classified as a social enterprise.

Based on these lists, we identified a total of 382 organizations were potential social enterprises.

Once contacted by our research assistants, potential respondents were further screened both, verbally and with the following text included on the first page of the questionnaire to determine whether they were (still) operating as a social enterprise:

“This is a survey of social enterprises in BC and Alberta. 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.”

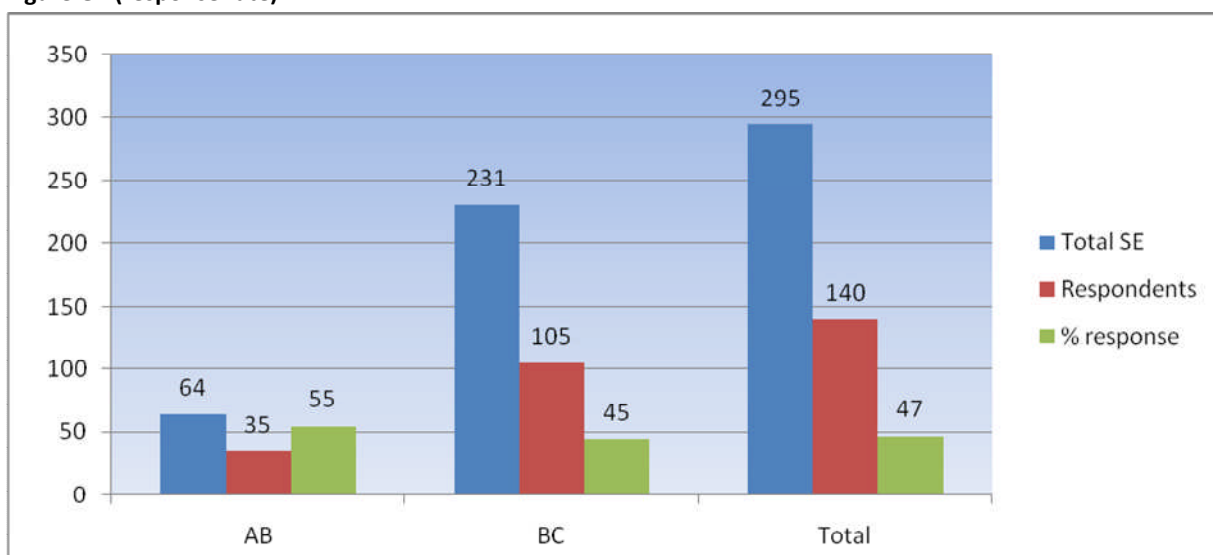
This resulted in 284 confirmed social enterprises. Of these, some indicated that they had multiple social enterprises, thus requiring a correction to the estimated population for multiple responses.

Of the 135 respondent organizations, 3 organizations indicated more than 1 SE (1 had 2, 2 had 3, for a total of 5 more). Hence our actual social enterprise response was  $n=140$ .

To account for the likelihood that some of the non-responding organizations contained multiple social enterprises, we therefore adjusted our estimate of the total number of social enterprises upward from 284 to  $N=295$ . Hence, our overall response rate = 47.5% [140 out of 295].

**Table 1: Survey Response**

Initial lists of potential social enterprises		382
1 = Not contactable (following several tries)	38	
2 = Contacted, not a social enterprise	53	
2.1 = Contacted, no longer a social enterprise	2	
2.5 = No response yet (follow-up with call and send questionnaire cold)	5	
Confirmed list of social enterprise organizations		284
3 = Contacted, refused to participate	26	
4 = Contacted, sent a questionnaire	50	
4.1= First Follow-up	23	
4.2= Second Follow-up	3	
4.3= Third Follow-up	47	
5 = Responded	140 social enterprises representing 135 listed organizations	140
Estimated number of actual social enterprises accounting for multiple enterprises per listed organization		295
Net response rate		47.5%

**Figure G1 (response rate)**

## **Questionnaire**

The questionnaire was developed and piloted by students in Peter Hall's Spring 2009 course, SCD 403 (Leadership in Sustainable Community Development). The questionnaire was further refined by the research team to deal with problems from 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 meet newly identified specific needs (e.g.'s, sources and uses of grant financing). However, the basic structure and length of the tested and proven questionnaire was retained. See Appendix C for the complete questionnaire. We have subsequently encouraged other social enterprise surveyors to use the same data fields for comparative purposes.

## **Data Treatment and Management**

Data entry spreadsheet and guidelines were established for the student research assistants who entered data subsequent to conducting / receiving interviews. Several random checks for internal consistency in responses were conducted by the researchers. When necessary, respondents were re-contacted to clarify unclear or contradictory responses, especially regarding the collection of financial data.

Various decisions about data classifications were made based on the responses received:

- Demographic groups: SEs providing drug treatment were recorded as serving ‘people with mental disability’; SEs providing assistance to students were recorded as serving ‘youth’.
- Types of business: ‘accommodation’ includes banquet halls, conference facilities, party space as well as overnight and short-term rental; ‘waste management’ includes recycling; ‘delivery/postering’ is a business service; ‘printing’ includes publishing; ‘health and social services’ includes treatment for addictions, etc.
- “Social Economy Sector” intermediaries: Based on open-ended responses that identified additional populations served by the SE, we created this new category. These are organizations that included other social enterprises, i.e., non-profits, co-ops, social agencies, farmers’ markets, and their employees, as part of their target group.
- ‘Number of populations’ and ‘Multi-populations’ targeted does not include “all people in a place” defined as a geographic community.

Some respondents were unable to provide an estimate of the Full-Time Equivalent (FTE) positions in their organization. In calculating Estimated FTEs, if respondent provided an FTE count, this was accepted. Otherwise an estimate based on 1 FTE per full-time employee, 0.5 per part-time and 0.25 per seasonal was calculated. Missing data were regarded as 0 for this calculation.

Although it is inaccurate to speak of many social enterprises in terms of profitability, since many are budget- or service-maximizers while others are satisficers<sup>2</sup>, we did calculate Profit as revenue minus expense. It allowed us to identify social enterprises that broke even (i.e., showed a profit of zero or more in the 2009 financial year).

### **Outliers**

We found considerable variation in levels of employment, financial indicators and the number of people in targeted groups that were trained, employed and served. We excluded as a potentially misleading outlier, membership and people served numbers for an SE in the cultural sector (which appeared to have included business clients / patrons in their reports). However, other high numbers, for example, the number of people served by a social enterprise that is part of a relief organization were not excluded. We also entered as missing the *Organization Formation* and *Start Year* for a SE linked to a First Nation since they responded that their organization was formed before the birth of Christ.

Finally, financial information was incomplete for some organizations, resulting in potentially misleading estimates for some indicators. Although we primarily present results that include all responses, we include only those that provided complete financial data when average financial data per social enterprise is reported.

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<sup>2</sup> With acknowledgement and apology to Herbert Simon, here we use the term 'satisfice' to describe the extremely complex motivations of a small number of social enterprises which seek to meet the multiple needs of a defined population without trying to maximize any one of them, and without trying to grow beyond their existing scale.

**Table 2: Business sector classification**

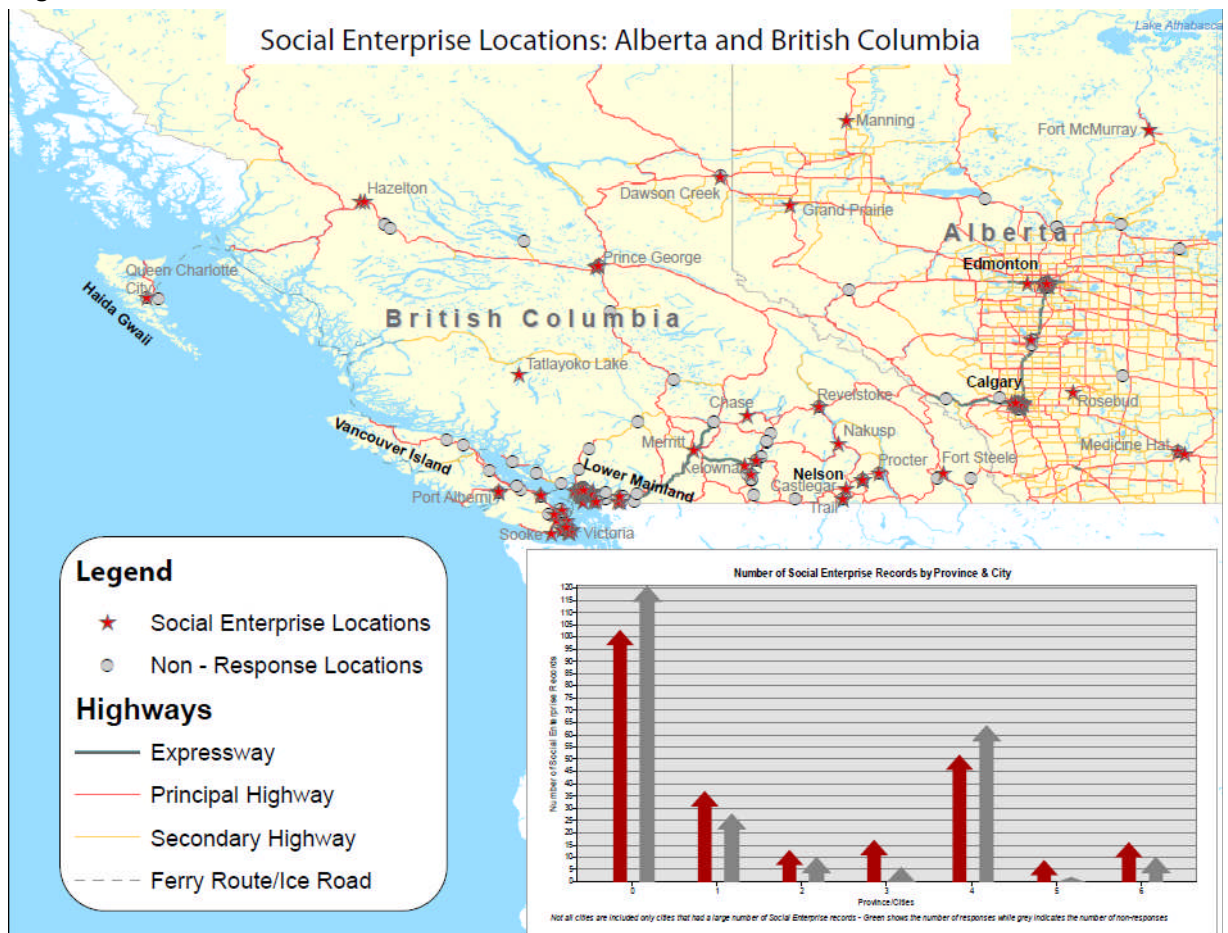
Broad Sector Grouping Based on Bouchard et al., 2008 (R-2008-01)	Detailed sector description (from questionnaire)	Percentage of SE's active in this sector
Resources, Production and Construction	Agriculture, forestry, fishing, mining Construction Food production Printing Production/manufacturing Repair and maintenance Sewing	37.1
Trade and Finance	Finance and insurance Retail sales (incl. thrift stores) Wholesale sales	33.6
Real Estate	Housing Property management Real estate	11.4
Accommodation, tourism and food service	Accommodation Food service/catering Food distribution Recreation Tourism	40.7
Health and Social Services	Day care Employment services Health care Social services	29,3
Arts, Culture and Communication	Arts, culture and communications Gallery/arts Theatre/performing arts	35.7
Other Services	Administrative services Consulting Education Janitorial/cleaning (including street cleaning) Landscaping/gardening Movers/hauling Personal services Professional services Public administration services Scientific/technical services Services for businesses Transportation and storage Waste management	58.6
Multi-sector (SE indicating that they sell goods or services in two or more of the above)		67.9

## Survey Findings

### Part 1: Geographic profile

The following four maps provide a view of the geographic location of social enterprises in Alberta and British Columbia. Even at a glance, it is clear that social enterprises are clustered around major metropolitan centres and transportation corridors. The first map (Figure M1) also illustrates that the 140 responses are a reasonable reflection, by location, of the total of 295 identified social enterprises.

Figure M1



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

- Figure M2 identifies the location of the 101 social enterprises in BC that responded and the 121 that did not respond;
- Figure M3 identifies the location of social enterprises within Vancouver and the Lower Mainland of BC. Again, it appears that 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 are able to find a market.
- The trend established in BC continues in Alberta (see Figure M4). Social enterprises are clustered around the two major urban areas, namely Edmonton and Calgary. In these two cities their respective community foundations have also engaged in some preliminary work and investment to promote social enterprises (e.g.'s, the Edmonton Community Foundation's *Social Enterprise Fund* and the Calgary Foundation's *Social Enterprise Readiness Survey*).

### **Profile by geographic location and purpose**

Maps in Appendix A also identify the location of social enterprises by purpose:

employment (Figures M5 – M7), income generation (Figures M8 – M10), social purpose (Figures M11 – 13), culture (Figures M14 – M16), and environment (Figures M17 – M19). Social enterprises are present throughout both provinces and parallel the distribution of population needs and market opportunities. As a result, they are geographically concentrated. More than half of respondents were located in Edmonton, Calgary, Vancouver and the BC Lower Mainland.



Further examination of the relationship between social enterprises and their context is found in Part 2: Demographic profile below.

## **Part 2: Demographic profile**

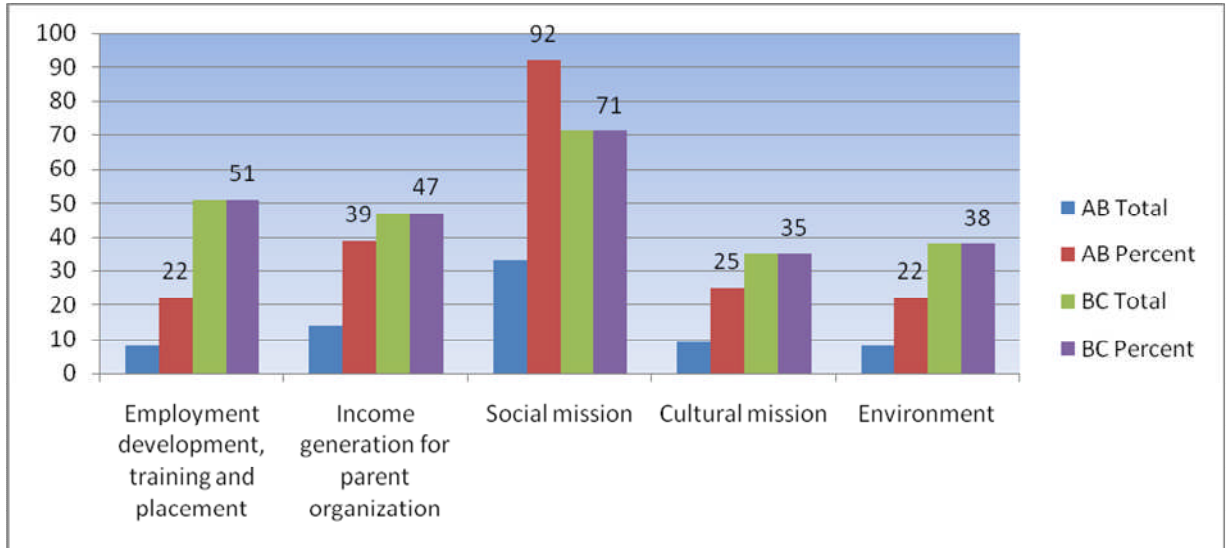
### **Age**

The mean age of social enterprises in BC was fifteen years and twenty-four years in Alberta. Organizations began selling operations shortly after they were founded (an average of about two-and-half years later), though this did vary depending on the enterprise. The oldest social enterprise in Alberta was formed in 1914 and the newest was formed in 2010. In BC, the oldest social enterprise was founded in 1950 and the most recent respondent will be formally launched in 2011.

### **Purpose & Mission**

Social enterprises in Alberta and British Columbia reflect a number of non-exclusive purposes. Eight (22%) Alberta social enterprises focused on employment and related activities while 51 (51%) of social enterprises in BC had a similar focus. Thirty-nine percent in Alberta and 47 percent of social enterprises in BC generated income for their parent organization. The highest percentage of social enterprises in both provinces (92% in AB/ 71% in BC) described themselves as having a social mission while 25% of social enterprises in AB and 35% in BC had a cultural mission. Environmental activities were pursued by 22% social enterprises in AB and 38% in BC.

**Figure G2 (profile of social enterprises by non-exclusive purpose)**



## Members

Responses to questions about the number of members associated with a social enterprise revealed that Alberta social enterprises had an average of 108 members and BC social enterprises had an average of 241. A total of 3,978 members of social enterprises were reported in Alberta and 23,892 in BC. Alberta social enterprises reported a membership base that ranged from zero to 750; whereas, in BC the range was from zero to 8,000.

Figure G3 (mean age and number of members: AB and BC)

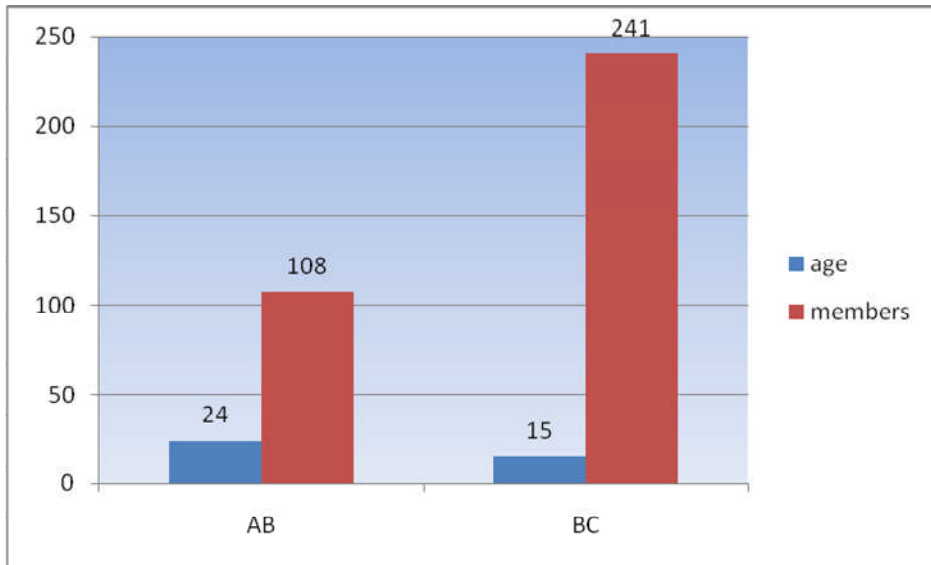
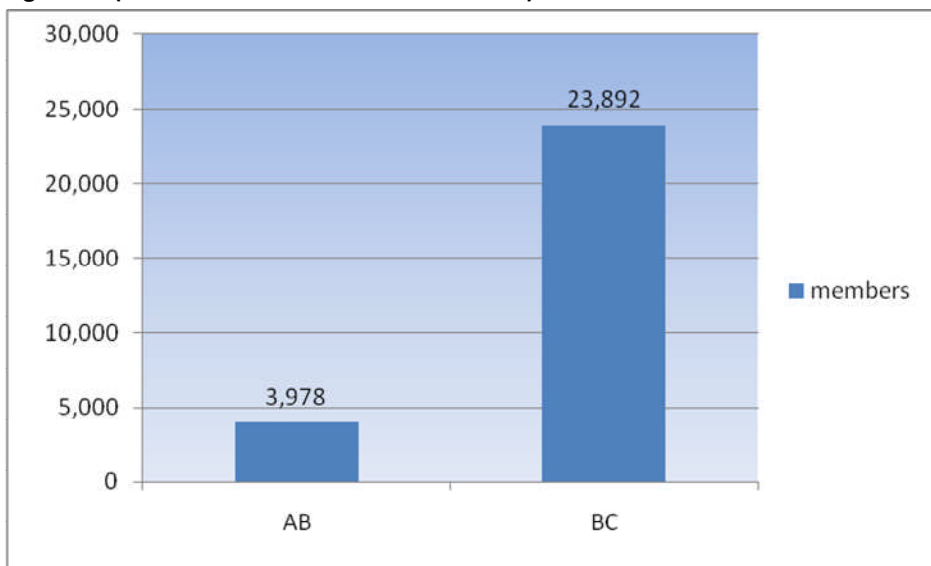


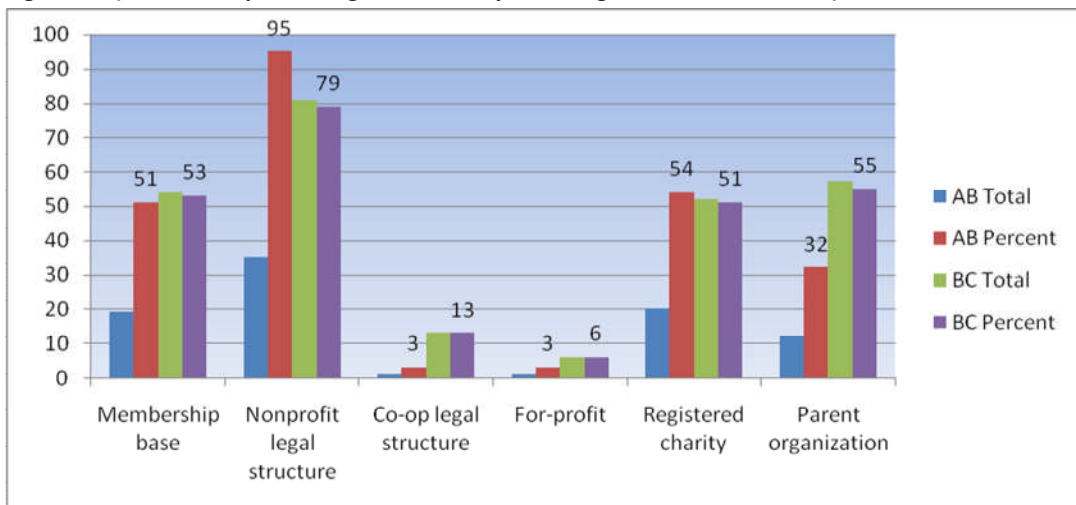
Figure G4 (Total number of members: AB and BC)



### Part 3: Corporate structure

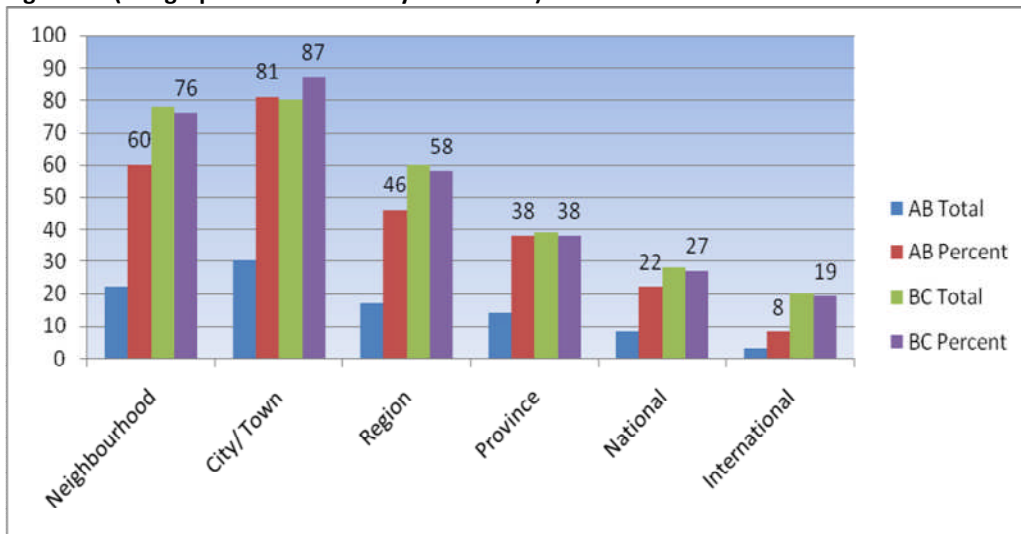
Nearly all social enterprises were registered as nonprofit organizations. Concurrently, more than 50 % of social enterprises in both provinces had a membership base; and a similar percentage was registered as a charity.

**Figure G5 (Membership base, legal structure, parent organization: AB and BC)**



The highest percentage of social enterprises provided support to immediate neighbourhoods (60% in AB; 76% in BC) and the proximal city or town (81% in AB; 87% in BC).

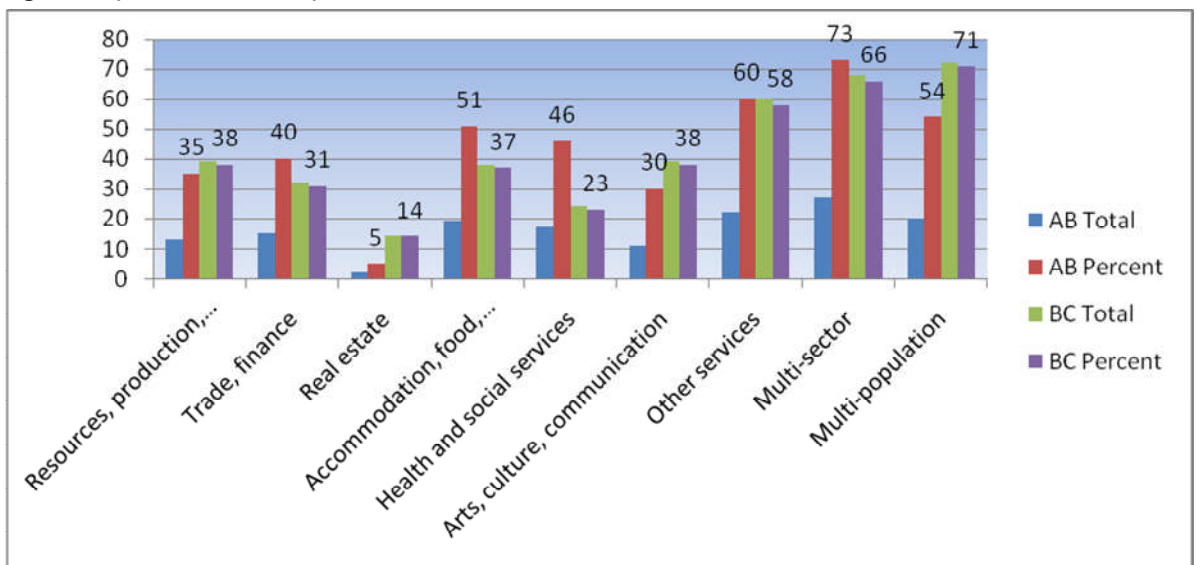
**Figure G6 (Geographic area of activity: AB and BC)**



**Industry sector**

When evaluated by industry sector, most social enterprises operate across multi-sectors and multi-populations. Social enterprises involved in accommodation, food and tourism are common as are those in trade and finance, resources, production and construction, and arts, culture and communication.

**Figure G7 (sector: AB and BC)**



## Part 4: Service profile

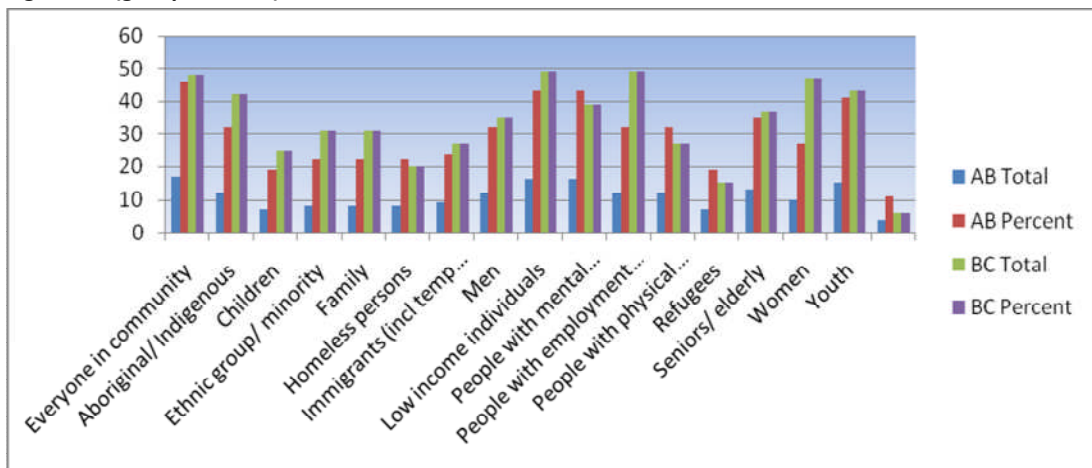
### Designated demographic groups

As part of their mission, social enterprises will often train, employ or provide services to designated demographic groups. Table 2 profiles this investment as a percentage of all social enterprises. The categories and percentages are not mutually exclusive.

### Groups served

A wide variety of groups are served by social enterprises. The highest percentage of groups served, although social enterprises are open to everyone in the community, are low-income individuals, people with mental disabilities, people experiencing employment barriers, women and youth.

Figure G8 (groups served)



**Table 3: Percentage of social enterprises that train, employ or serve each demographic group as part of their mission**

All the people living in a particular place / community	47.1
Aboriginal / indigenous people	39.1
Children	23.2
Ethnic group / minority	28.3
Family	28.3
Homeless persons	20.3
Immigrants (including temporary workers, permanent residents, etc.)	26.1
Men	34.1
Lower income individuals	47.1
People with mental disabilities	39.9
People with employment barriers	44.2
People with physical disabilities	28.3
Refugees	15.9
Senior / aged / elderly	36.2
Women	41.3
Youth / young adults	42.0
Non-profits, co-ops, social enterprises and their employees	7.2

**People Trained**

In 2009, the year respondents were asked to report on, a total of 11,670 people were trained by social enterprises; 1,216 in Alberta and 10,454 in British Columbia (AB range = 0 – 250 / BC range = 0 - 2,000).

**People Employed**

Social enterprises engage members, volunteers, employees, and those that could be designated as special needs employees. Social enterprises provide meaning and dignity for marginalized individuals or those with a disability through work. While the social enterprise may be subsidized by the public sector, these individuals also earn wages as

an employee. Often the subsidy funds are allocated to training and special supports.

This particular phenomenon within social enterprises complicates the task of enumerating employment figures than otherwise would be the case (see footnote<sup>3</sup>).

Surveyed social enterprises provided employment for members of designated social groups for a total of 763 people in Alberta (range = 0 – 350) and 1,938 in BC (range = 0 – 245). See Table 2 (above) for a detailed breakdown of the demographic groups served and employed by social enterprises in both provinces.

Not only are employment opportunities created for members of designated social groups, social enterprises are also important direct employers. Social enterprises staff are often members of the designated or special needs groups, but not always. Social enterprises have full-time, part-time and seasonal employees. In the survey we asked respondents to estimate Full-Time Equivalent positions created, and estimated a number for those respondents who did not provide their own.

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<sup>3</sup> Note that our employment numbers are conservative regarding estimation of impact of social enterprise activity. For example, some marketing and cooperative 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.



Social enterprises also created employment for contract workers. Once again, these individuals may be members of designated groups, especially when the social enterprise is involved in marketing the products of independent producers who are 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 SEs that provide them with services (especially common amongst SEs with a strong employment-training and linkage aspect in their mission).

**Table 4: Employment (AB and BC)**

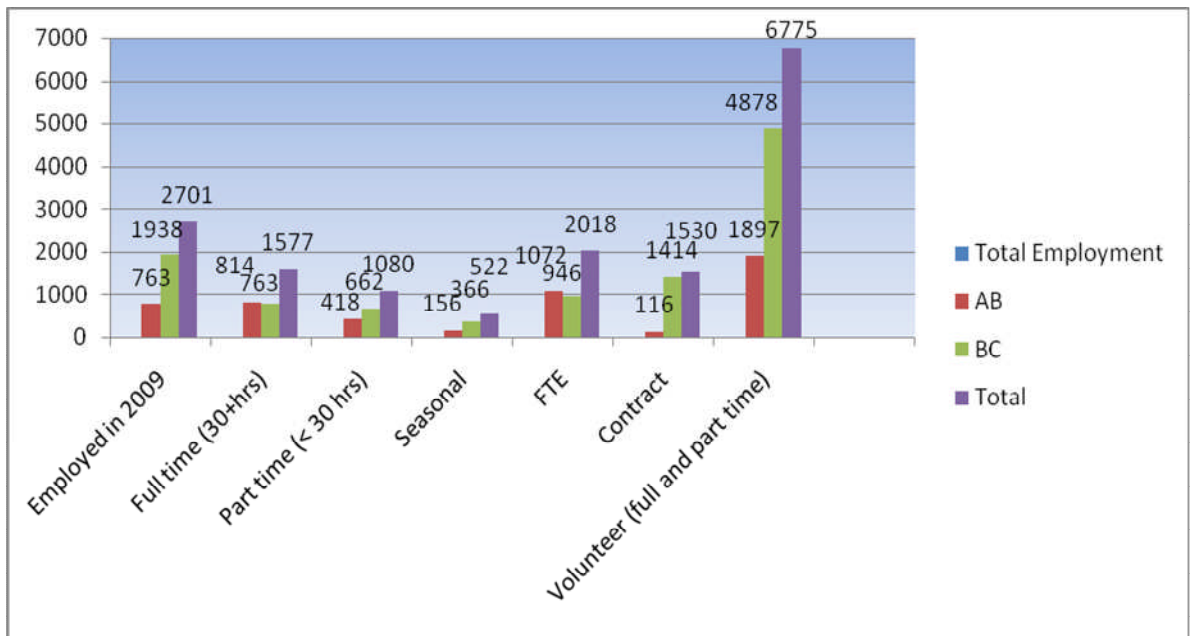
<b>Employment</b>	<b>Alberta</b>	<b>British Columbia</b>	<b>Total (AB+BC)</b>
<b>Number</b>	(Mean) Range	(Mean) Range	
<b>Members of designated groups employed in 2009</b>	(23.8) 0 - 350	(20.2) 0 - 245	(763+1,938) = 2,701
<b>Full time (work 30+ hrs per week)</b>	(22.6) 0 – 294	(5.4) 0 - 50	(814+549) = 1,363
<b>Part time (work &lt;30 hrs per week)</b>	(11.6) 0 – 136	(6.6) 0 -150	(418+662) = 1,080
<b>Seasonal</b>	(4.3) 0 - 100	(3.7) 0- 125	(156+366) = 522
<b>FTE (estimate)</b>	(29.8) 0 - 350	(9.4) 0 – 117.5	(1,072+946) = 2,018
<b>Contract</b>	(3.2) 0 - 53	(14.6) 0 - 250	(116+1,414) = 1,530
<b>Volunteer (full- and part-time)</b>	(52.7) 0 - 600	(48.8) 0 - 800	(1,897+4,878) = 6,775

The total number of associated volunteers in Alberta was 1,897 and 4,878 in BC.

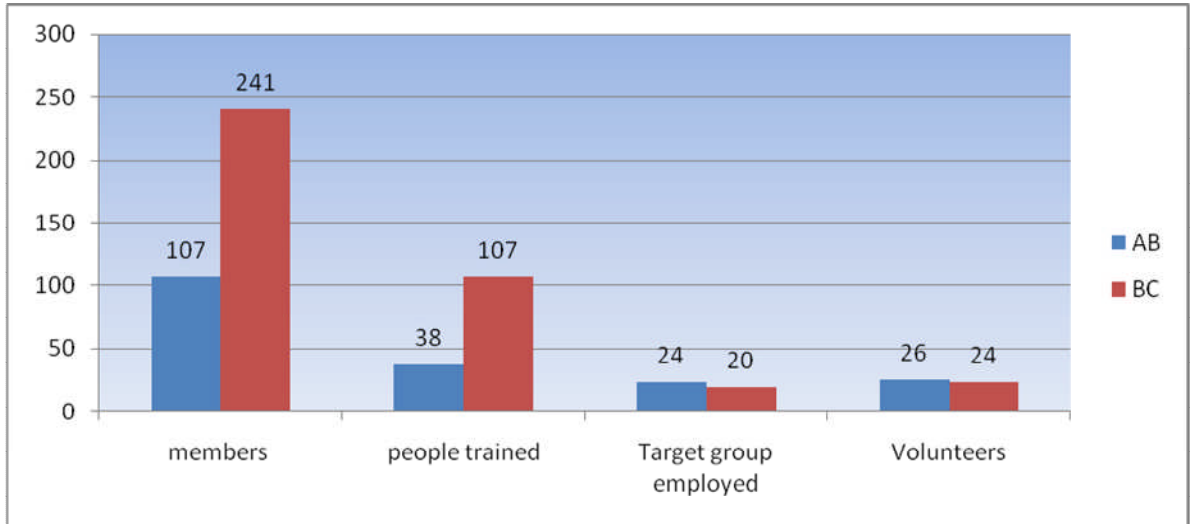
Volunteers who worked more than 10 hours a month comprised 44% of all volunteers in Alberta and 43% in BC.

The following graphs reflect the statistics in the chart above. A total of 2,701 people or 60% of the 4,500 full-time, part-time, seasonally, or on contract employees in social enterprises in AB and BC are employed members of designated social groups, as reflected in the mission of the social enterprise.. The surveyed social enterprises were responsible for 1,363 full-time and 1,080 part-time positions as well as 522 seasonal positions. The number of full-time positions was higher in AB, although the number of social enterprises in BC is three times that of AB. The number of full and part-time volunteers in social enterprises in BC was more than twice the number of AB.

**Figure G9 (social enterprise target group employment)**



**Figure G10 (mean social enterprise age, membership, trainees, target group employed and volunteers: AB and BC)**



**Figure G11 (total social enterprise membership, trainees, target group employees and volunteers: AB and BC)**



Finally, with regards to employment, the following tables provide the distribution of social enterprises by estimated FTEs, and the number of people in designated groups that were trained, employed and served. The tables confirm the wide diversity in the size and scope of social enterprise activity.

**Table 5: Distribution of Social Enterprises by estimated FTEs**

<i>Estimated FTEs, 2009</i>	Percent
None	8.0
Less than 2	24.1
2 to 4,99	24.1
5 to 9.99	15.3
10 to 19.99	12.4
20 to 49.99	10.9
Over 50	5.1

**Table 6: Distribution of Social Enterprises by number trained from target population**

<i>Trained, 2009</i>	Percent
None	33.8
1 to 9	23.1
10 to 49	21.5
50 to 199	12.3
200 or more	9.2

**Table 7: Distribution of Social Enterprises by number employed from target population**

<i>Employed, 2009</i>	Percent
None	28.1
Less than 2	7.0
2 to 4.99	16.4
5 to 9.99	14.1
10 to 19.99	10.2
20 to 49.99	14.8
Over 50	9.4

**Table 8: Distribution of Social Enterprises by number served from target population**

<i>Served, 2009</i>	Percent
None	19.5
1 to 9	8.1
10 to 49	9.8
50 to 199	11.4
200 to 999	21.1
1000 or more	30.1

## Part 5: Financial profile

### *Profitable vs not profitable*

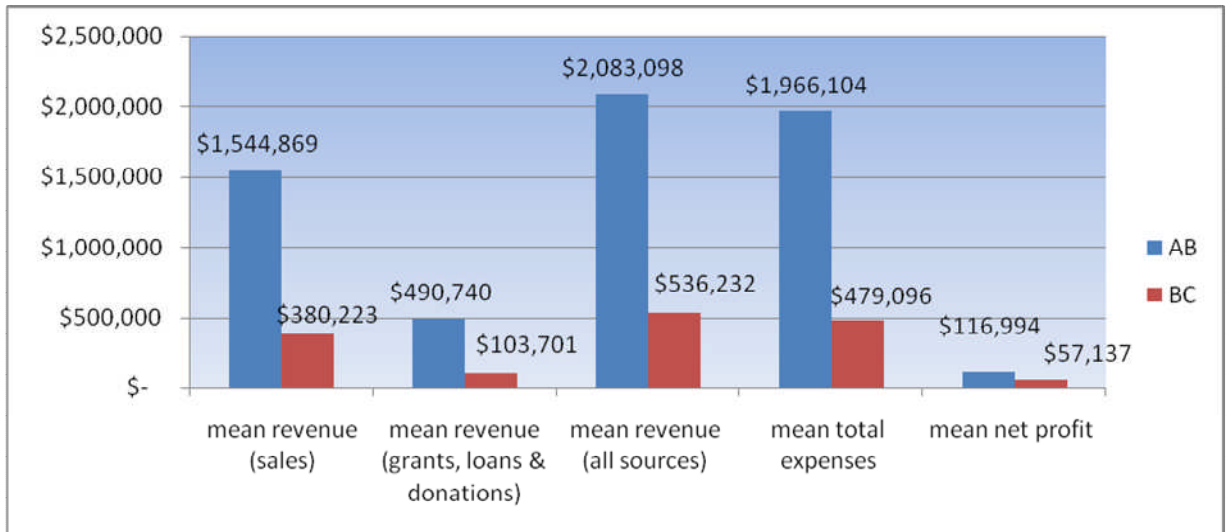
Noting again that the concept of 'profitability' is not always useful when discussing social enterprises, though financial self-sustainability is, we report here that very little difference exists between the profitable and the not profitable groups. This analysis was also limited, both by sample size and due to the dearth of prior financial records. We cannot account for SE that balance revenues and expense over several years, since we effectively had access to income statement, not balance sheet, information.

Those SEs not breaking even are not necessarily younger although, those not breaking even are slightly smaller across various quantitative indicators. We also found that 8 of 10 intermediary organizations did not break even ( $n$  too small for chi-square test). Only the following finding is statistically significant:

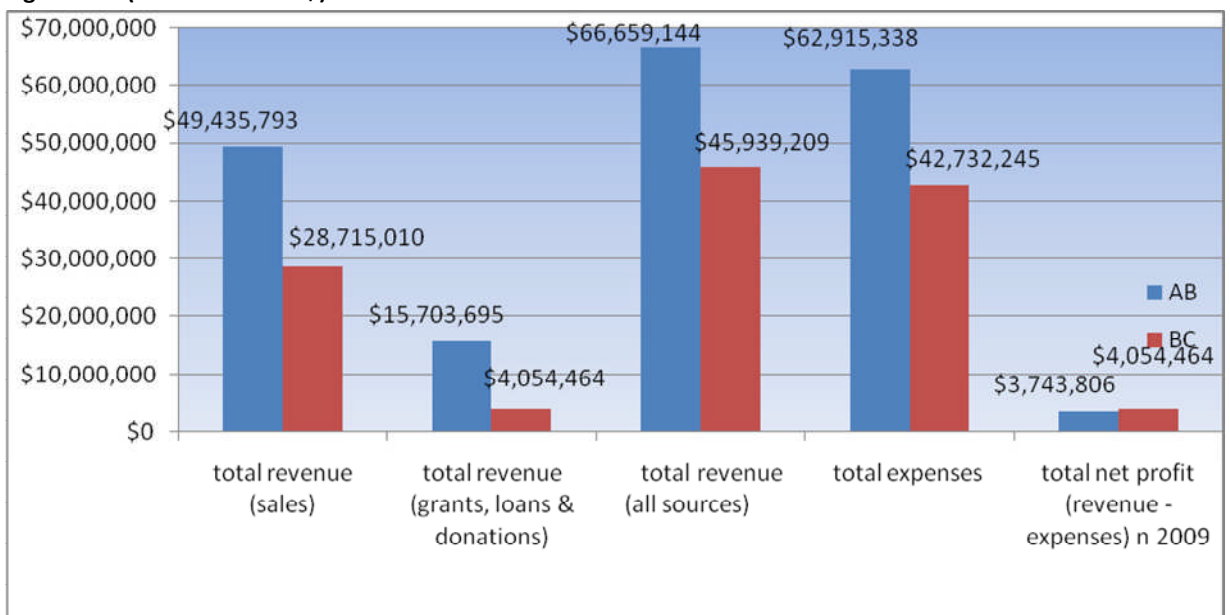
- Those targeting people with employment barriers are more likely to breakeven ( $p=0.052$ ). These organizations are also more likely to be working with government contracts for defined services which must be provided within a defined budget. This relationship is confirmed by the fact that those which rely on operational grants are more likely to breakeven ( $p=0.081$ ), 80% vs 75% overall.

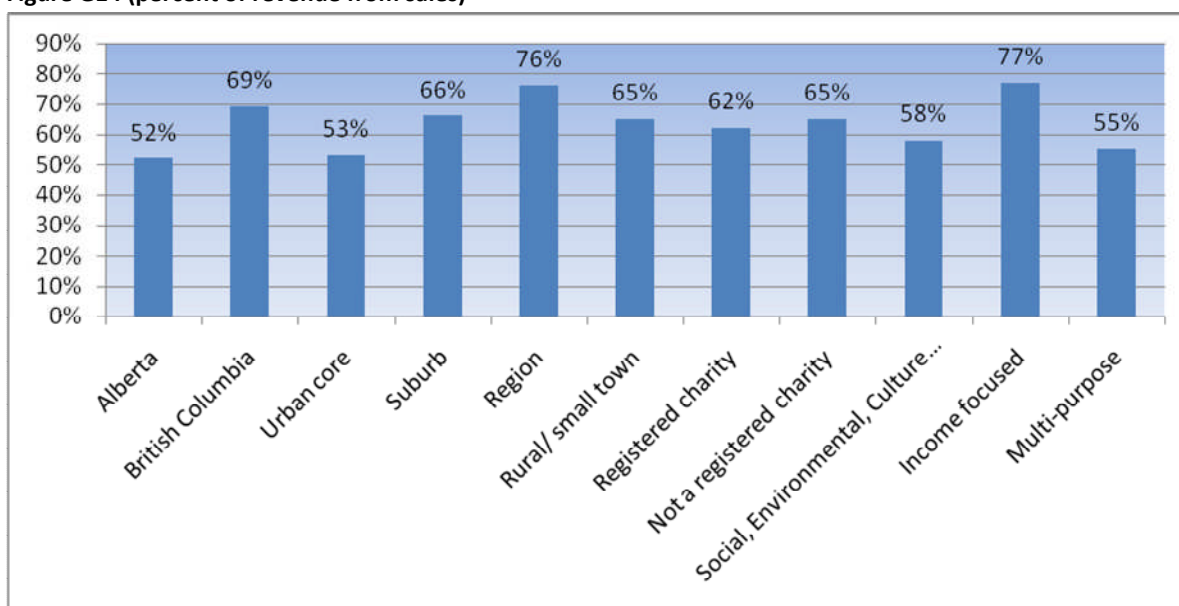
Figures G12 and G13 respectively report the mean and aggregate financial performance of the respondent social enterprises for 2009. Figure G14 reports on the percentage of revenue from sales, which is over 50% in all categories of social enterprise. This verifies the extent to which social enterprises rely on market activities as a critical source of revenue.

**Figure G12 (finances – mean \$)**



**Figure G13 (finances – total \$)**



**Figure G14 (percent of revenue from sales)\***

\* only respondents with complete financial data (n=105)

Finally, with regards to revenue, the following tables provide the distribution of social enterprises by revenue and the percentage of revenue accounted by sales. The tables confirm the wide diversity in the size and scope of social enterprise activity.

**Table 9: Distribution of social enterprises by revenue**

Total revenue, 2009	Percent
\$0-\$10k	9.2
\$10,001-\$50k	10.1
\$50,001-\$100k	10.1
\$100,001-\$500k	37.8
\$500,001-\$1m	13.4
\$1,000,001-\$5m	16.8
\$5m or more	2.5

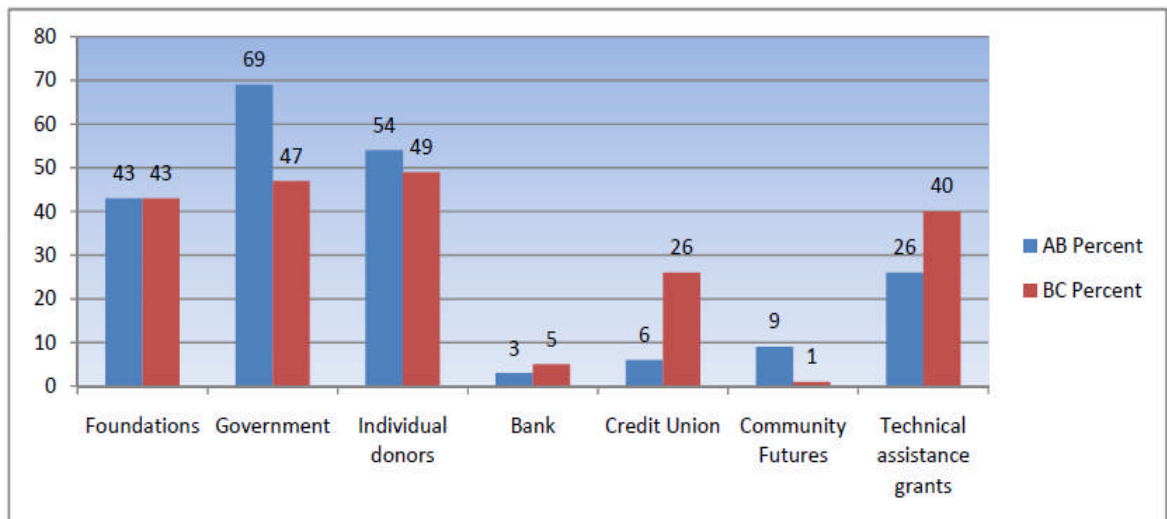
**Table 10: Distribution of social enterprises by sales as a percentage of total revenue**

Sales as Percent of Revenue, 2009	Percent
Less than 10%	13.0
10-25%	8.3
26-50%	12.0
51-75%	21.3
76-90%	13.9
More than 90%	31.5

### Sources of Finance

Government is the primary source of financing for social enterprises, followed by individuals and foundations. The greater access of social enterprises in BC to Credit Unions is also noteworthy as it could represent an untapped source of financing for social enterprises in Alberta.

Figure G15 (sources of financing)





## Two Analytical Lenses

An interesting finding of this research is that social enterprise organizational form and legal structure do not tell us either very much about the activities nor the impact of the organization. This is a tentative finding; more research needs to be conducted to fully examine and to elaborate on this proposition. Nevertheless, we were strongly impressed by how diverse the social enterprises were, and by how little organizational form seemed to matter. So, if organizational form appears to be of secondary importance, what matters?

In this section we step back from the descriptive survey results and reflect upon two modes of thought regarding the forces that influence activities and impact social enterprises. Firstly, the purpose of the social enterprise – chosen by the founders, regardless if they are a parent non-profit or some other individual or group, exerts a clear influence on the scale and nature of the operations undertaken. We propose three ways of classifying SE by purpose. But purpose is not sufficient, since social enterprises also ‘choose’ to fulfill their purpose (or mission) by engaging with the market. Secondly, then, SE activities and impact also reflect the ‘environment’ in which they operate. We explore this dimension by examining the impact of geographic location on social enterprises in BC and Alberta.

### **Focus: Income, Cause and Diversity**

We identify three mutually exclusive social enterprise types based on their focus:

1. Income-focused: defined as an organization with a singular purpose (income-generation) or, if two purposes, one of which is income and the other either employment or cultural or environmental purpose. Social purpose is excluded here because it does not differentiate sufficiently.

2. Social, cultural or environmental-focused: an organization within one of more of a social, cultural or environmental focus, and which has neither income-generation nor employment as an additional focus.
3. Multi-purpose focused: an organization which has employment as a purpose and may have other purposes.

Table 4 in Appendix B 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, which include those with large government contracts, exhibit a closer link between money and their mission – probably also indicative of SE's that are in financial competition with the private sector for government contracts.

In contrast, *income-focused* organizations are:

- Less likely to have a membership base (13% vs 53%)
- Less likely to be non-profits (29% vs 48%)
- Less likely to have a place-community focus (25% vs 38%)
- Less likely to focus on aboriginals, children, ethnic minorities, low income, elderly, women, and youth.

## **Environment: Core, Suburban, Regional and Small Town**

We also identify four geographic contexts for social enterprises:

1. Core urban, including the downtown core of the three largest metropolitan areas in the two provinces, namely, greater Vancouver, Calgary and Edmonton.
2. Suburban, including suburban locations in Vancouver, Calgary and Edmonton.
3. Regional centres, including cities such as Victoria, Kelowna, Prince George, Nanaimo, Dawson Creek, Nelson and Abbotsford.
4. Rural and small town, including places such as Port Alberni, Proctor, Rosebud, Medicine Hat, Trail, Castlegar, none of which have populations of more than 10,000.

Table 3 in Appendix B compares social enterprises of these four types across a range of indicators:

- Social enterprises in small towns and rural areas are smaller than those in major urban centres, yet they are more diverse in their activities.
- The largest social enterprises in terms of employees and revenue are more commonly found in suburban locations of major cities. Often these organizations have a clear mandate to generate income for their parent non-profit.
- Social enterprises in core areas of major cities are surprisingly diverse. Some are more like their large suburban counterparts, often with a national and international mandate. Others are more like those found in small towns and rural areas; smaller but with diverse activities that engage members of specific communities, such as aboriginal and homeless populations.

## Conclusion

This survey represents an initial profile of social enterprises in BC and Alberta. 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 was that the social enterprise must, when possible, be independently verified as a social enterprise. In 2009, the 140 social enterprises that responded to the survey generated at least \$113 million in revenues, including at least \$78 million in sales. They paid \$63 million in wages and salaries to almost 4,500 people, of whom 2,700 were employed as a mandate of the mission of the organization. They also trained 11,670 people, provided services to over 678,000, and involved 6,780 volunteers.

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 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.

Strength, Size, Scope

## Appendix A: Location Maps

Figure M2



Figure M3





Figure M4

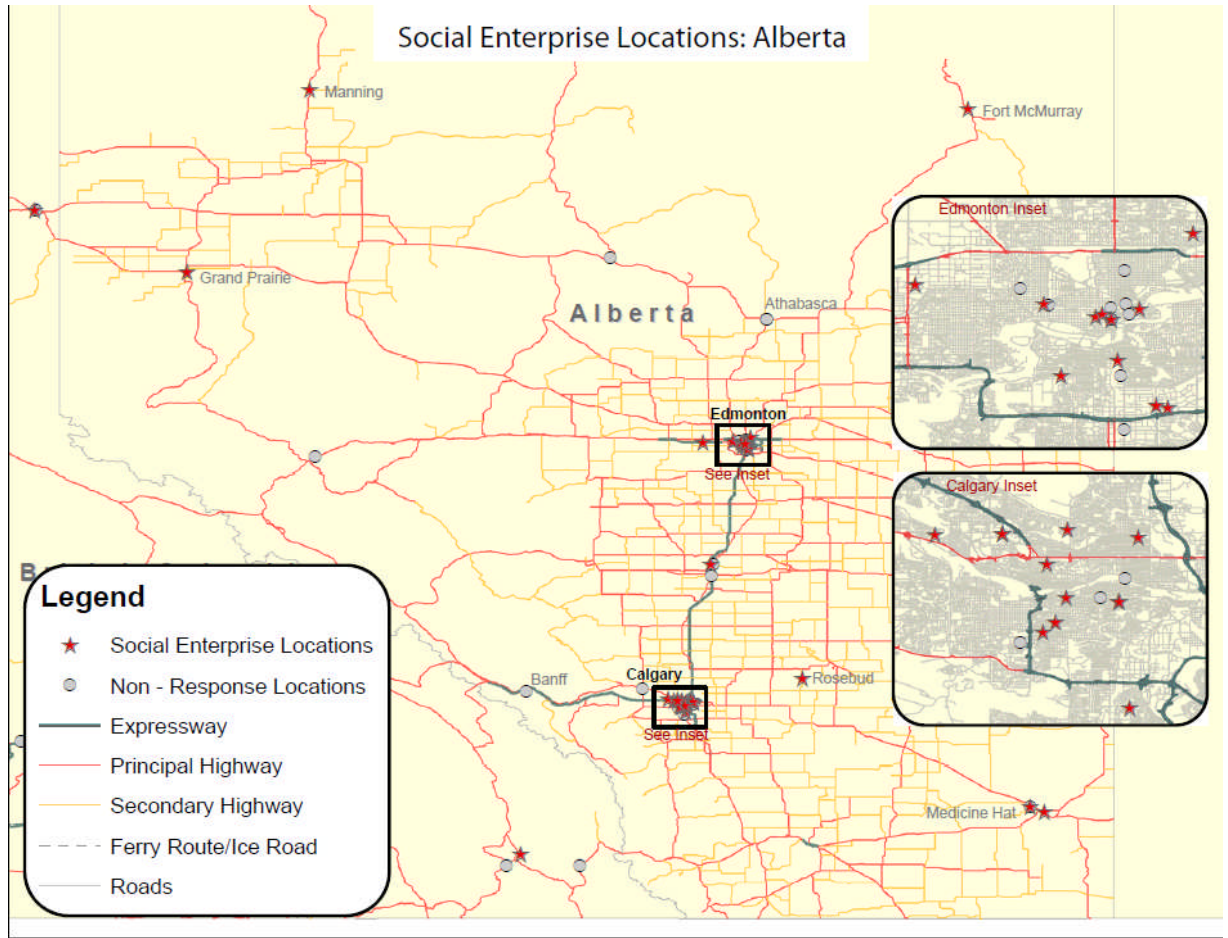




Figure M5

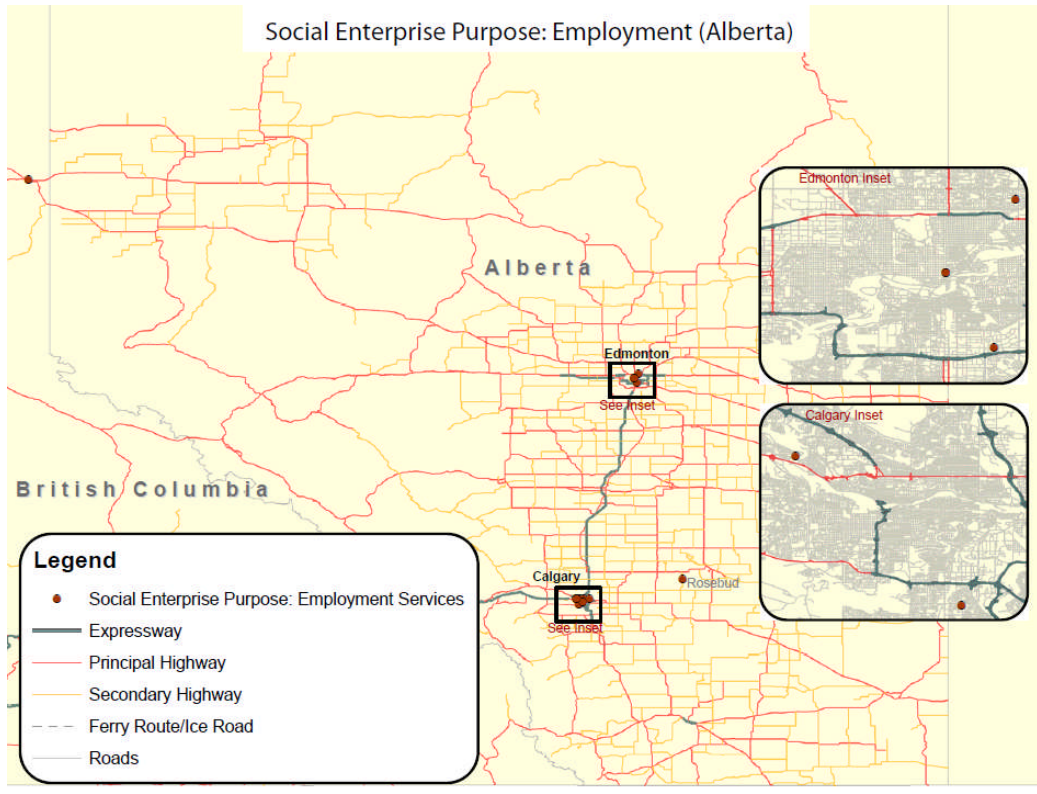


Figure M6



Figure M7

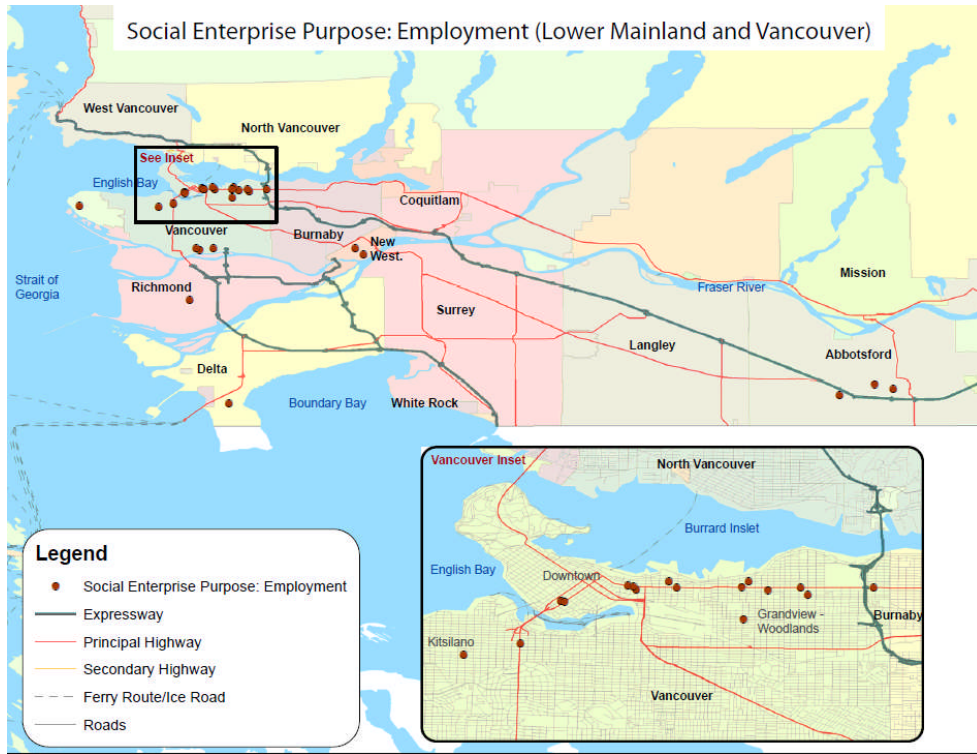


Figure M8

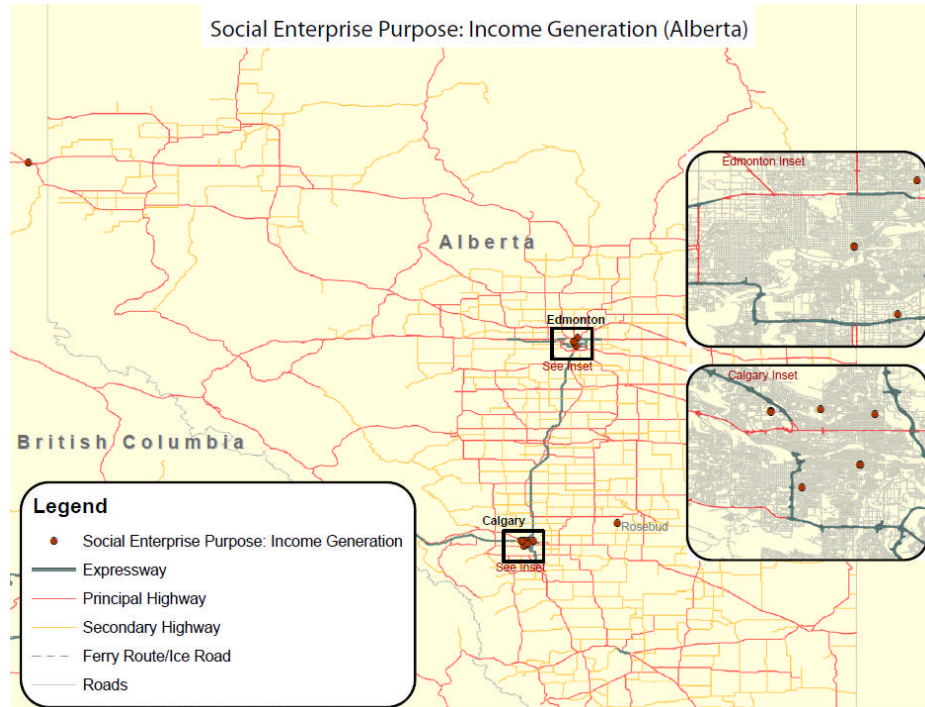


Figure M9

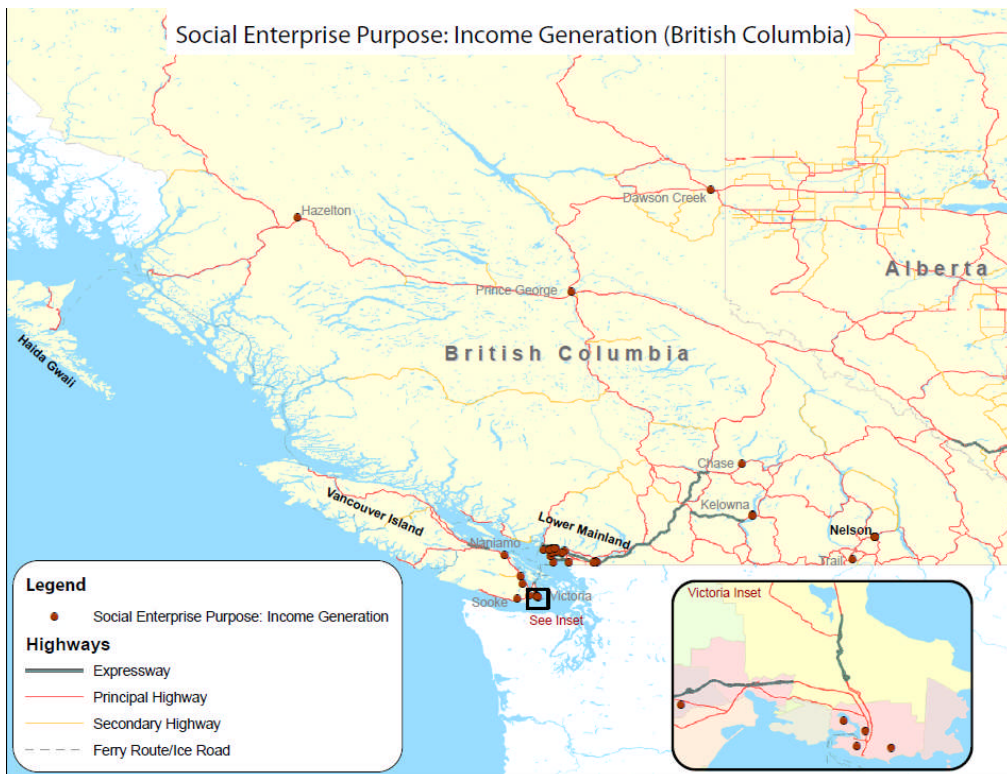




Figure M10

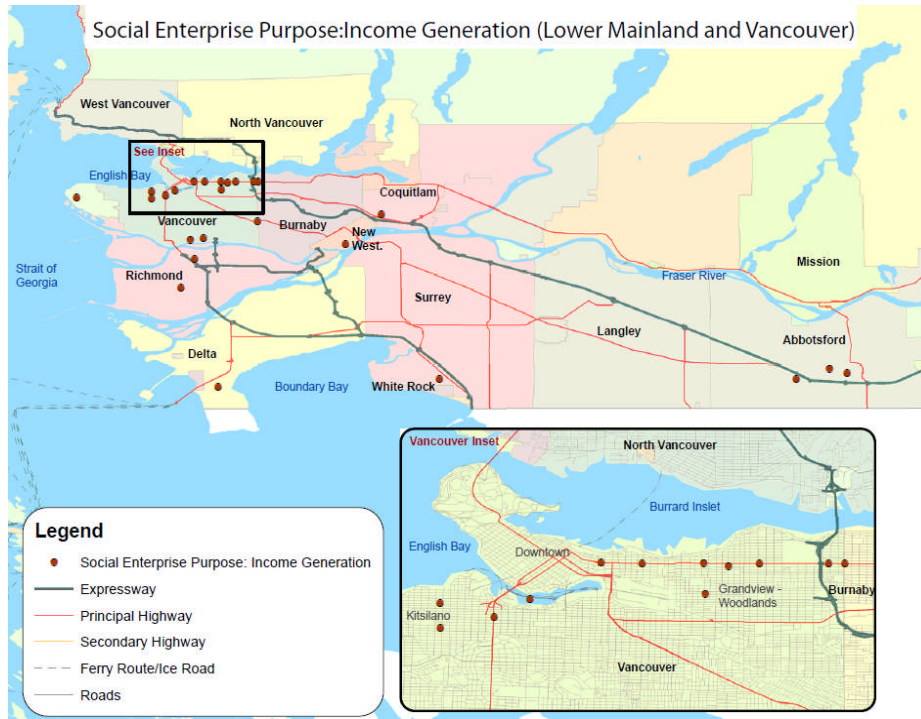


Figure M11

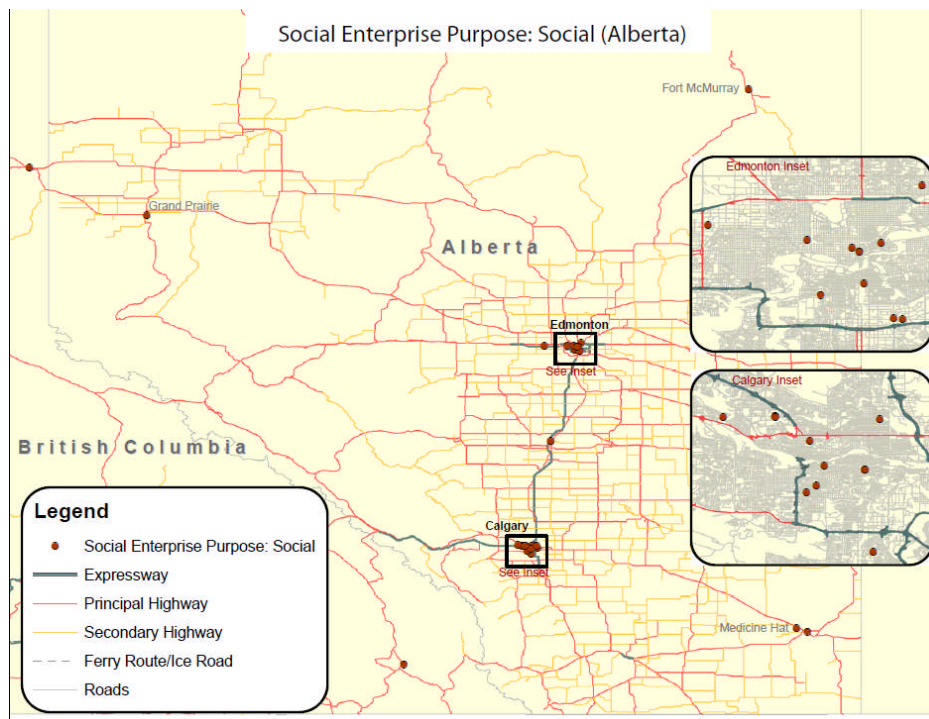


Figure M12



Figure M13



Figure M14

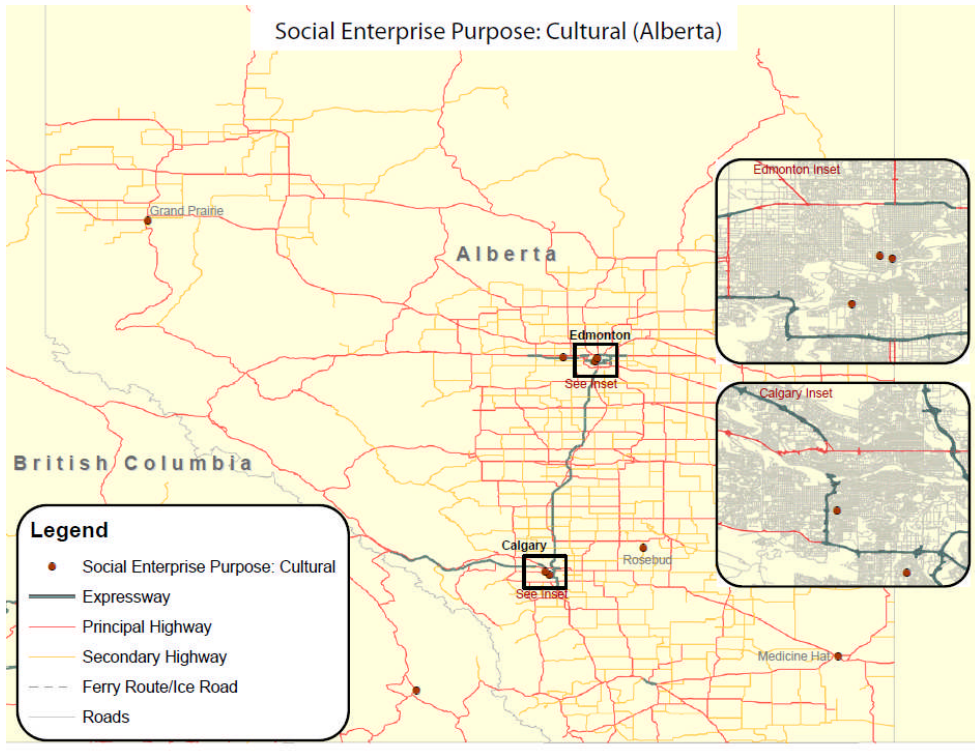


Figure M15





Figure M16

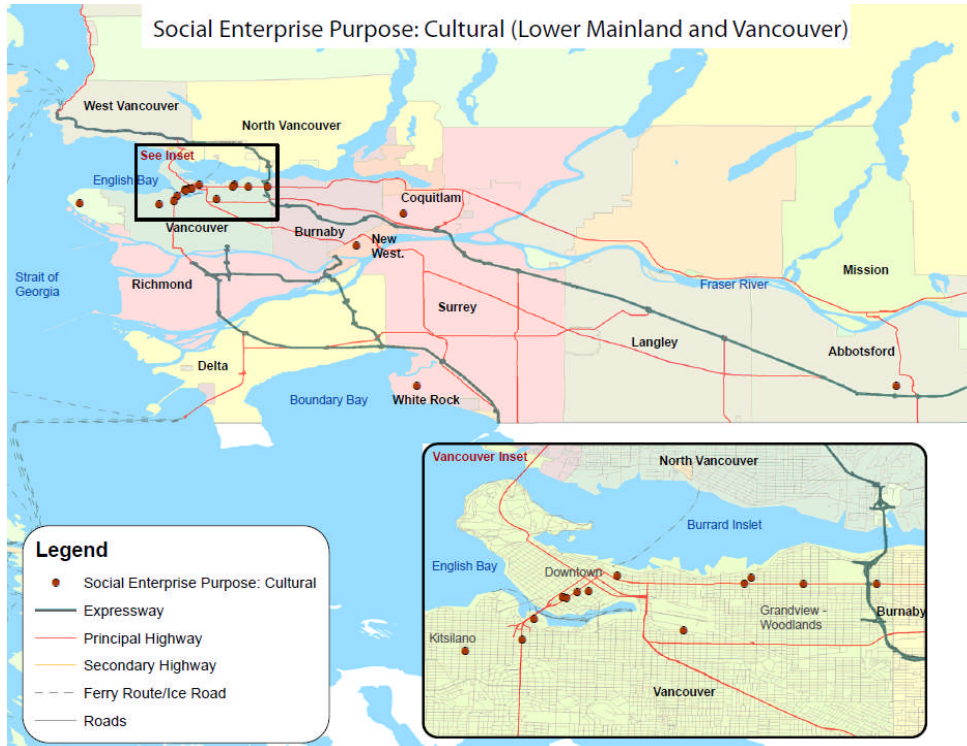


Figure M17

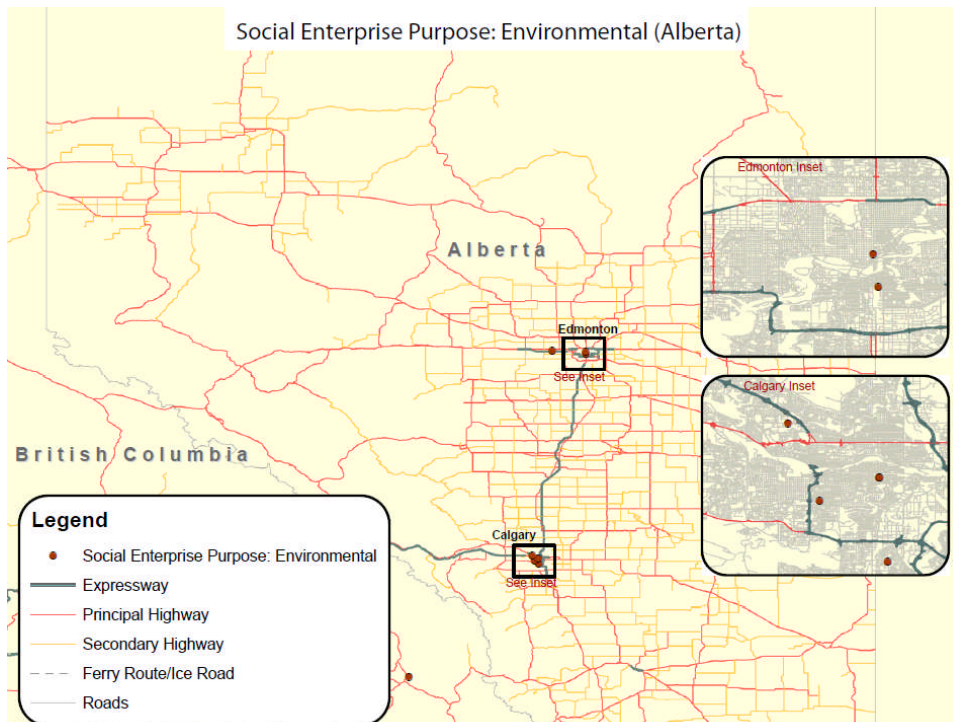
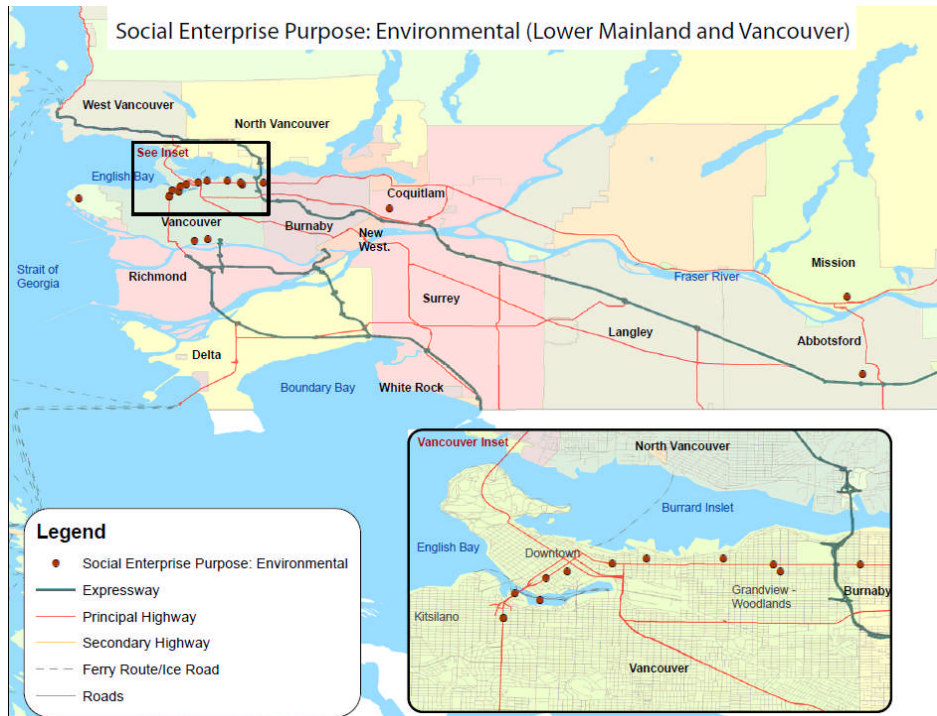


Figure M18



Figure M19





## Appendix B: Key Points of Comparison

**Table 11: Key points of comparison: Province**

	<b>Alberta</b>	<b>British Columbia</b>	<b>Both Provinces</b>
<b>Demographic profile</b>			
Year of formation: median	1991.5	2000.0	1997.0
Year of first sale: median	1995.0	2002.0	1999.0
Number of business sectors (1-7): average	2.7	2.4	2.5
Number of targeted populations (0-16): average	4.6	5.2	5.0
Members: average in 2009	107.5	241.3	204.9
Trained: average for 2009	38.0	106.7	89.8
Employed (from target group): average for 2009	23.8	20.2	21.1
Served: average for 2009	10537.9	3828.8	5519.7
FTEs: average in 2009	29.8	9.4	14.7
Volunteers (full-and part-time): average in 2009	52.7	48.8	49.8
Total expenditure: average in 2009 *	\$1,966,104	\$479,096	\$932,279
Total wages and salaries: average in 2009 *	\$1,254,618	\$262,582	\$564,917
Total revenue: average in 2009 *	\$2,083,098	\$536,232	\$1,007,658
Revenue from sales of goods and services: average 2009 *	\$1,544,869	\$380,223	\$735,163
Revenue from grants, loans, donations: average 2009 *	\$490,740	\$103,701	\$221,656
Revenue exceeds expenses in 2009: percent	72.7%	74.7%	74.1%
Sales as percent of revenue: average per organization 2009 *	51.7%	68.8%	63.6%
Revenue less grants/loans/donations exceeds expenses in 2009: percent	24.2%	32.1%	29.8%
<b>Purpose (percent of social enterprises):</b>			
Employment development, training and placement	22.2%	50.5%	43.1%
Income generation for parent organization	38.9%	47.0%	44.9%
Social mission	91.7%	70.3%	75.9%
Cultural mission	25.0%	34.7%	32.1%
Environmental mission	22.2%	37.6%	33.6%
<b>Legal structure (percent of social enterprises):</b>			
Non-profit legal structure	94.6%	78.6%	82.9%
Registered charity	54.1%	51.0%	51.8%

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

**Key points of comparison: Province (cont.)**

	<b>Alberta</b>	<b>British Columbia</b>	<b>Both Provinces</b>
<b>Target groups (percent of social enterprises):</b>			
All the people living in a particular place / community	45.9%	47.5%	47.1%
Aboriginal / Indigenous people	32.4%	41.6%	39.1%
Children	18.9%	24.8%	23.2%
Ethnic minority	21.6%	30.7%	28.3%
Families	21.6%	30.7%	28.3%
Homeless people	21.6%	19.8%	20.3%
Immigrants	24.3%	26.7%	26.1%
Men	32.4%	34.7%	34.1%
Lower income individuals	43.2%	48.5%	47.1%
People with mental disabilities	43.2%	38.6%	39.9%
People with employment barriers	32.4%	48.5%	44.2%
People with physical disabilities	32.4%	26.7%	28.3%
Refugees	18.9%	14.9%	15.9%
Senior / aged / elderly	35.1%	36.6%	36.2%
Women	27.0%	46.5%	41.3%
Youth / Young adults	40.5%	42.6%	42.0%
Non-profits, co-ops, social enterprises (intermediaries)	10.8%	5.9%	7.2%
<b>Sources of finance (percent of social enterprises):</b>			
Foundations	42.9%	42.7%	42.7%
Government	68.6%	46.9%	52.7%
Private individuals, philanthropists, donors	54.3%	49.0%	50.4%
Bank	2.9%	5.2%	4.6%
Credit Union	5.7%	26.0%	20.6%
Community Futures	8.6%	1.0%	3.1%
<b>Purpose of finance (percent of social enterprises):</b>			
Technical assistance grants	25.7%	39.6%	35.9%
Operation grants	77.1%	58.3%	63.4%
Long-term loans / equity	0.0%	5.3%	3.8%
Short-term loans	0.0%	4.2%	3.1%

**Table 12: Key points of comparison: Purpose**

	<b>Mission- focused (cultural, environmental, social)</b>	<b>Income- focused</b>	<b>Multi- purpose</b>	<b>All</b>
<b>Demographic profile</b>				
Year of formation: median	1995.0	1996.0	1999.0	1997.0
Year of first sale: median	1998.0	2000.0	2001.0	1999.0
Number of business sectors (1-7): average	2.5	2.0	3.0	2.5
Number of targeted populations (0-16): average	4.3	3.8	7.1	5.0
Members: average in 2009	205.3	51.4	383.1	207.9
Trained: average for 2009	42.8	73.2	167.2	91.2
Employed (from target group): average for 2009	15.1	25.4	25.1	21.4
Served: average for 2009	3853.3	7670.7	5519.0	5606.8
FTEs: average in 2009	12.8	18.7	13.7	15.0
Volunteers (full-and part-time): average in 2009	31.5	41.1	82.5	50.5
Total expenditure: average in 2009 *	\$1,170,809	\$1,039,931	\$518,898	\$941,229
Total wages and salaries: average in 2009 *	\$718,191	\$633,740	\$298,557	\$570,346
Total revenue: average in 2009 *	\$1,180,906	\$1,178,008	\$617,031	\$1,017,330
Revenue from sales of goods and services: average 2009 *	\$920,768	\$824,509	\$407,667	\$742,214
Revenue from grants, loans, donations: average 2009 *	\$228,772	\$271,601	\$164,379	\$223,787
Revenue exceeds expenses in 2009: percent *	71.1%	71.4%	80.0%	73.9%
Sales as percent of revenue: average per organization 2009 *	57.9%	77.4%	54.9%	63.3%
Revenue less grants/loans/donations exceeds expenses in 2009: percent	29.5%	29.4%	26.5%	28.6%
<b>Purpose (percent of social enterprises):</b>				
Employment development, training and placement	0.0%	43.2%	95.2%	43.1%
Income generation for parent organization	0.0%	100.0%	41.5%	44.9%
Social mission	74.5%	65.9%	88.1%	75.9%
Cultural mission	41.2%	2.3%	52.4%	32.1%
Environmental mission	23.5%	18.2%	61.9%	33.6%
<b>Legal structure (percent of social enterprises):</b>				
Non-profit legal structure	94.1%	75.0%	78.6%	83.2%
Registered charity	54.9%	53.5%	50.0%	52.9%

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

**Key points of comparison: Purpose (cont.)**

	<b>Mission- focused (cultural, environmental, social)</b>	<b>Income- focused</b>	<b>Multi- purpose</b>	<b>All</b>
<b>Target groups (percent of social enterprises):</b>				
All the people living in a particular place / community	58.0%	36.4%	42.9%	46.3%
Aboriginal / Indigenous people	32.0%	20.5%	66.7%	39.0%
Children	32.0%	9.1%	28.6%	23.5%
Ethnic minority	24.0%	18.2%	45.2%	28.7%
Families	38.0%	22.7%	23.8%	28.7%
Homeless people	16.0%	13.6%	33.3%	20.6%
Immigrants	20.0%	18.2%	40.5%	25.7%
Men	24.0%	29.5%	50.0%	33.8%
Lower income individuals	44.0%	29.5%	69.0%	47.1%
People with mental disabilities	28.0%	45.5%	50.0%	40.4%
People with employment barriers	26.0%	43.2%	66.7%	44.1%
People with physical disabilities	20.0%	25.0%	42.9%	28.7%
Refugees	10.0%	13.6%	26.2%	16.2%
Senior / aged / elderly	34.0%	25.0%	50.0%	36.0%
Women	34.0%	29.5%	61.9%	41.2%
Youth / Young adults	38.0%	29.5%	59.5%	41.9%
Non-profits, co-ops, social enterprises (intermediaries)	10.0%	11.4%	0.0%	7.4%
<b>Sources of finance (percent of social enterprises):</b>				
Foundations	46.9%	38.5%	43.9%	43.4%
Government	65.3%	38.5%	53.7%	53.5%
Private individuals, philanthropists, donors	49.0%	38.5%	63.4%	50.4%
Bank	0.0%	7.7%	7.3%	4.7%
Credit Union	18.4%	23.1%	22.0%	20.9%
Community Futures	0.0%	2.6%	7.3%	3.1%
<b>Purpose of finance (percent of social enterprises):</b>				
Technical assistance grants	35.4%	30.0%	43.9%	36.4%
Operation grants	70.8%	47.5%	73.2%	64.3%
Long-term loans / equity	4.3%	0.0%	7.3%	3.9%
Short-term loans	2.1%	2.5%	4.9%	3.1%

**Table 5: Key points of comparison: Market reach**

	<b>Core Urban</b>	<b>Suburban</b>	<b>Regional Centre</b>	<b>Small town /rural</b>	<b>All</b>
<b>Demographic profile</b>					
Year of formation: median	1998.0	1993.5	2001.0	1998.0	1997.0
Year of first sale: median	1999.0	1995.0	2002.5	2001.0	1999.0
Number of business sectors (1-7): average	2.5	2.1	2.3	3.1	2.5
Number of targeted populations (0-16): average	6.1	4.7	4.3	4.4	5.0
Members: average in 2009	478.9	61.4	119.8	50.6	204.9
Trained: average for 2009	86.9	160.1	45.8	65.8	89.8
Employed (from target group): average for 2009	29.6	20.9	17.2	12.5	21.1
Served: average for 2009	3222.4	10479.0	5075.5	3650.5	5519.7
FTEs: average in 2009	10.1	33.0	7.0	9.2	14.7
Volunteers (full-and part-time): average in 2009	55.6	63.3	38.6	37.3	49.8
Total expenditure: average in 2009 *	\$531,524	\$2,126,357	\$405,840	\$610,486	\$932,279
Total wages and salaries: average in 2009 *	\$277,571	\$1,483,872	\$193,609	\$247,302	\$564,917
Total revenue: average in 2009 *	\$588,964	\$2,295,291	\$432,096	\$645,454	\$1,007,658
Revenue from sales of goods and services: average 2009 *	\$411,934	\$1,761,374	\$295,451	\$409,566	\$735,163
Revenue from grants, loans, donations: average 2009 *	\$156,659	\$401,434	\$98,274	\$225,319	\$221,656
Revenue exceeds expenses in 2009: percent *	65.9%	71.4%	82.6%	83.3%	74.1%
Sales as percent of revenue: average per organization 2009 *	53.4%	66.3%	75.8%	65.3%	63.6%
Revenue less grants/loans/donations exceeds expenses in 2009: percent	17.5%	25.0%	34.8%	52.2%	29.8%
<b>Purpose (percent of social enterprises):</b>					
Employment development, training and placement	40.9%	41.2%	48.4%	42.9%	43.1%
Income generation for parent organization	34.1%	58.8%	61.3%	25.9%	44.9%
Social mission	75.0%	88.2%	64.5%	75.0%	75.9%
Cultural mission	36.4%	23.5%	19.4%	50.0%	32.1%
Environmental mission	36.4%	23.5%	38.7%	35.7%	33.6%
<b>Legal structure (percent of social enterprises):</b>					
Non-profit legal structure	81.8%	88.2%	69.7%	93.1%	82.9%
Registered charity	62.8%	61.8%	39.4%	37.9%	51.8%

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

**Key points of comparison: Market reach (cont.)**

	<b>Core Urban</b>	<b>Suburban</b>	<b>Regional Centre</b>	<b>Small town /rural</b>	<b>All</b>
<b>Target groups (percent of social enterprises):</b>					
All the people living in a particular place / community	45.5%	29.4%	53.1%	64.3%	47.1%
Aboriginal / Indigenous people	54.5%	26.5%	25.0%	46.4%	39.1%
Children	27.3%	20.6%	18.8%	25.0%	23.2%
Ethnic minority	36.4%	26.5%	18.8%	28.6%	28.3%
Families	31.8%	26.5%	25.0%	28.6%	28.3%
Homeless people	34.1%	20.6%	12.5%	7.1%	20.3%
Immigrants	43.2%	20.6%	15.6%	17.9%	26.1%
Men	36.4%	41.2%	31.3%	25.0%	34.1%
Lower income individuals	59.1%	38.2%	43.8%	42.9%	47.1%
People with mental disabilities	45.5%	44.1%	40.6%	25.0%	39.9%
People with employment barriers	47.7%	35.3%	46.9%	46.4%	44.2%
People with physical disabilities	29.5%	29.4%	25.0%	28.6%	28.3%
Refugees	25.0%	17.6%	3.1%	14.3%	15.9%
Senior / aged / elderly	40.9%	32.4%	34.4%	35.7%	36.2%
Women	50.0%	41.2%	37.5%	32.1%	41.3%
Youth / Young adults	45.5%	41.2%	46.9%	32.1%	42.0%
Non-profits, co-ops, social enterprises (intermediaries)	6.8%	8.8%	9.4%	3.6%	7.2%
<b>Sources of finance (percent of social enterprises):</b>					
Foundations	64.3%	32.3%	31.0%	34.5%	42.7%
Government	57.1%	48.4%	41.4%	62.1%	52.7%
Private individuals, philanthropists, donors	69.0%	51.6%	34.5%	37.9%	50.4%
Bank	2.4%	9.7%	0.0%	6.9%	4.6%
Credit Union	21.4%	16.1%	20.7%	24.1%	20.6%
Community Futures	0.0%	6.5%	3.4%	3.4%	3.1%
<b>Purpose of finance (percent of social enterprises):</b>					
Technical assistance grants	47.6%	25.0%	20.7%	46.4%	35.9%
Operation grants	71.4%	65.6%	51.7%	60.7%	63.4%
Long-term loans / equity	4.8%	0.0%	3.4%	7.4%	3.8%
Short-term loans	4.8%	0.0%	3.4%	3.7%	3.1%

## Appendix C: Survey Questionnaire

### BC-ALBERTA SOCIAL ENTERPRISE STUDY, 2010

To be completed by BALTA:

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) and their research assistants, under the auspices of the SSHRC-funded Community-University Research Alliance, "The Social Economy in BC and Alberta: Strengthening the Foundations for Growth". The project is 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 both provinces.

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. Your answers will be combined with those provided by other respondents, and analyzed by the BALTA research team. The original questionnaires will be held in locked cabinets in our university offices until the end of 2012, and then destroyed. An electronic version of the data will be made available only to the BALTA research team. The final report may be placed on the BALTA and Enterprising Non-Profits (enp) 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, and you will also be able to obtain a copy of the final report by contacting the BALTA Coordinator, Stuart Wulff at: [balta@explornet.com](mailto:balta@explornet.com) or 250-723-2296. The research will be completed by June 2010.

If you have any questions please contact Dr Peter Hall at 778-782-6691 or [pvhall@sfu.ca](mailto:pvhall@sfu.ca) or Dr Peter Elson at 403-440-8722 or [pelson@mtroyal.ca](mailto:pelson@mtroyal.ca). The research has been reviewed and approved by the SFU Office of Research Ethics (ORE) 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](mailto:hal_weinberg@sfu.ca) or 778-782-6593, or to Dr. Sean Maw, Chair HREB, MRU (403)440-6590 or [smaw@mtroyal.ca](mailto:smaw@mtroyal.ca).

I agree, of my own free will, to participate in this questionnaire survey for the BC-ALBERTA Social Enterprise Study, 2010 (please check).

YES

NO

This is a survey of social enterprises in BC and Alberta. 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	
BC and Alberta	
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	Personal services	
Accommodation		Printing	
Administrative services		Production/manufacturing	
Agriculture, forestry, fishing, mining		Professional services	
Art and culture		Property Management	
Communications		Public administration services	
Construction		Real estate	
Consulting		Recreation	
Day care		Repair and Maintenance	
Education		Retail sales (incl. Thrift stores)	
Employment services		Scientific/technical services	
Finance and insurance		Services for Businesses	
Food service/catering		Sewing	
Food production		Social services	
Food distribution		Theatre/performing arts	
Gallery/arts		Tourism	
Health care		Transportation and storage	
Housing		Waste management	
Janitorial/cleaning (incl. street cleaning)		Wholesale sales	
Landscaping/Gardening		Other, please specify.....	
Movers/hauling			

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	
People with employment barriers	
People with physical disabilities	
Refugees	
Senior / aged / elderly	
Women	
Youth / young adults	
Other, please specify: .....	

9.1 From the groups listed above, in 2009...

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

	Number in 2009
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 2009? Estimated totals are acceptable. Please include those who you employ as part of your mission:

	Total number employed / volunteering in 2009
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 2009 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.

	2009
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 2009?

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 2009?

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:**

**BRITISH COLUMBIA: MAIL** (Dr Peter Hall, Urban Studies, Simon Fraser University, 515 W Hastings St, Vancouver BC, V6B 5K3), **EMAIL** ([pvhall@sfu.ca](mailto:pvhall@sfu.ca)) **OR FAX** (778-782-5297).

**ALBERTA: MAIL** (Dr Peter Elson, Institute for Nonprofit Studies, Mount Royal University, 4825 Mount Royal Gate SW, Calgary AB, T3E 6K6), **EMAIL** ([pelson@mtroyal.ca](mailto:pelson@mtroyal.ca)) **OR FAX** (403-440-8610).

**NOTES**

## NOTES



**This report is available online at:**

**BALTA**

<http://www.socialeconomy-bcalberta.ca/>

**Institute for Nonprofit Studies, Mount Royal University**

<http://www.mtroyal.ca/ProgramsCourses/FacultiesSchoolsCentres/InstituteforNonprofitStudies/>

(Nonprofit Resources)

**Urban Studies, Simon Fraser University**

<http://www.sfu.ca/~pvhall/>