

ALBERTA SOCIAL ENTERPRISE SURVEY (2014)

This survey is part of a national study of social enterprises being conducted by Simon Fraser and Mount Royal Universities in partnership with the Trico Charitable Foundation and the Alberta Association of Agricultural Societies. Its purpose is to better understand the social enterprise sector, primarily nonprofits, co-operatives, and other organizations that:

- *earn some, or all, of their revenues from the sale of goods and services; and*
- *invest the majority of their surpluses/profits into social, cultural or environmental goals*

The information gathered through this survey will help guide the government, community, agricultural societies and social enterprises to develop new resources, programs and policies to help this important sector of our Alberta economy to grow.

Questions? brittni.kerluke@tricofoundation.ca or call Brittni Kerluke at (403) 228-6756 ext 3

Welcome to the 2014 Social Enterprise Survey for Alberta

This survey has been pre-tested and is expected to take a maximum of 25 minutes to complete, assuming you have the required information, including your 2013 year-end financial statement, available.

Please note, you can exit the survey and then return to complete it by entering your e-mail on the front page, as long as you have not finished it.

We appreciate you taking your valuable time to complete this survey. An opportunity to provide comments or suggestions will appear at the end of the survey.

You may preview a READ ONLY version of the entire survey. This is for information purposes only.

Please complete the survey as soon as you are able. Your information is important to us.

Please enter your email address below.

You will need to re-enter your email address here if you want to return to complete the survey.

PLEASE DO NOT CLICK ON THE FINAL SUBMIT BUTTON AT THE END OF THE SURVEY IF YOU INTEND TO RETURN TO COMPLETE THE SURVEY.

Data is saved automatically as you complete each page.

	Email:		
--	---------------	--	--

Statement on research ethics

This research project is being conducted by the *Trico Charitable Foundation* under the direction of Brittini Kerluke, and in collaboration with Dr Peter Hall (Simon Fraser University), Dr Peter Elson (Mount Royal University) and the Alberta Association of Agriculture Societies. The goal of this survey is to support the social enterprise sector by creating clear indicators of the nature, scope and socio-economic contribution of social enterprises in Alberta.

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 survey report will be placed on the website for the *Trico Charitable Foundation*, the Institute for Nonprofit Studies, Mount Royal University and the Social Enterprise Sector Survey web site: www.sess.ca 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. We anticipate that the research will be completed by July, 2014.

If you have any questions please contact Brittini Kerluke (403) 228-6756 ext 3 or Dr Peter Elson at 403-440-8722 or pelson@mtroyal.ca or Dr Peter Hall at 778-782-6691 or pvhall@sfu.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 Jeff Toward, Director, Office of Research Ethics by email at Jtoward@sfu.ca or telephone at 778-782-6593. or to the Chair HREB, MRU (403)440-6494 or hreb_chair@mtroyal.ca.

Please answer the following: I agree, of my own free will, to participate in this questionnaire survey for the Social Enterprise Study, 2014 (please check one):

	Yes	No
	<input type="checkbox"/>	<input type="radio"/>

Definition of a social enterprise

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

So that we can classify your organization correctly, does your organization undertake both, one, or none of the following activities that define a social enterprise?

	YES	NO
Our organization owns or operates a business venture or facility	<input type="radio"/>	<input type="radio"/>
Our organization sells goods and services in the market for the purpose of creating a blended return on investment, both financial and	<input type="radio"/>	<input type="radio"/>

Definition of a social enterprise

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

So that we can classify your organization correctly, does your organization undertake both, one, or none of the following activities that define a social enterprise?

	YES	NO
social/ environmental/cultural		

	YES	NO
Is your organization an Agricultural Society?	<input type="checkbox"/>	<input type="radio"/>

Thank you. Please continue to complete the survey.

The questionnaire is designed for quick completion.

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

Please provide the following details about your organization	
Name of organization	
Mailing address	
Postal code:	
Phone number (with area code):	
Web site URL:	

1.0 Year of formation and operation. Please answer parts 1.1 and 1.2

1.1 In which year was your Social Enterprise formed (incorporated/ approved) its founding constitution?	
1.2 in which year did your Social Enterprise first start selling products or services?	

2. What is the PURPOSE of your Social Enterprise?

*Please check **all** that apply*

Social purpose	<input type="checkbox"/>
Cultural purpose	<input type="checkbox"/>
Environmental purpose	<input type="checkbox"/>
Income generation for parent organization	<input type="checkbox"/>
Employment development	<input type="checkbox"/>
Training for workforce integration	<input type="checkbox"/>

2.1 In your own words, what is the PRIMARY MISSION of your Social Enterprise?

--	--

3.0 Does your Social Enterprise have individual or organizational members?		
Yes	<input type="radio"/>	
No	<input type="radio"/>	

If YES

3.1 How many individual members does your Social Enterprise have?	
3.2 How many organizational members does your Social Enterprise have?	

4.0 What is the form of incorporation of your Social Enterprise?
*Please check **all** that apply-*

<input type="checkbox"/>	Nonprofit corporation	
<input type="checkbox"/>	Limited liability corporation (for-profit)	
<input type="checkbox"/>	Co-operative, non-financial (distributes surplus)	
<input type="checkbox"/>	Co-operative, non-financial (non-profit distributing)	
<input type="checkbox"/>	Credit union/ Caisse Populaire	
<input type="checkbox"/>	Other (please specify)	

5.0 Is your Social Enterprise a registered charity with the Canada Revenue Agency?

Yes	<input type="radio"/>
No	<input type="radio"/>

6.0 Do you have a parent organization?

Yes	<input type="radio"/>
No	<input type="radio"/>

6.1 If yes, what is the name of your parent organization?

--	--

6.2 What is your relationship with the parent organization?

*Select the **one** option which best describes your relationship with the parent organization:*

<input type="radio"/>	We have no parent organization
<input type="radio"/>	We are an in-house program, project or department of the parent organization
<input type="radio"/>	We are a separate organization that works closely with the parent organization
<input type="radio"/>	We are an independent organization, operating at arm's length from a parent organization

6.3 Did your parent organization regularly provide any of the following supports in the past 12 months?

*Please check **all** that apply*

<input type="checkbox"/>	Personnel (time of staff, administration, management, etc)
--------------------------	--

6.3 Did your parent organization regularly provide any of the following supports in the past 12 months?

Please check **all** that apply

<input type="checkbox"/>	In-kind (goods, materials, transportation, etc)
<input type="checkbox"/>	Space (offices, storage, accommodations, etc)
<input type="checkbox"/>	Finance (grants, loans, loss write-off, etc)
<input type="checkbox"/>	Other (please specify) _____

7.0 What is the name of the municipality (town, city, village, district or reserve) in which your main office is located?

--	--

7.1 In which of the following geographic areas or scales do you operate or provide services?

Please check **all** that apply

<input type="checkbox"/>	To a neighbourhood / local community
<input type="checkbox"/>	To a city / town
<input type="checkbox"/>	Across a region (county / regional district)
<input type="checkbox"/>	Across the province / territory
<input type="checkbox"/>	Across Canada
<input type="checkbox"/>	Internationally
<input type="checkbox"/>	Other (please specify) _____

5

8.0 In which sectors does your Social Enterprise sell products and/or services?

Please check **all** that apply.

<input type="checkbox"/>	Accommodation (overnight, short-term)
<input type="checkbox"/>	Administrative services
<input type="checkbox"/>	Agriculture, forestry, fishing, mining
<input type="checkbox"/>	Arts and culture
<input type="checkbox"/>	Communications (mail, radio, internet)
<input type="checkbox"/>	Construction
<input type="checkbox"/>	Consulting
<input type="checkbox"/>	Day care
<input type="checkbox"/>	Education
<input type="checkbox"/>	Emergency and relief
<input type="checkbox"/>	Employment services
<input type="checkbox"/>	Environment and animal protection
<input type="checkbox"/>	Facilities (banquet, conference, party)
<input type="checkbox"/>	Finance and insurance
<input type="checkbox"/>	Food service/catering
<input type="checkbox"/>	Food production
<input type="checkbox"/>	Food distribution
<input type="checkbox"/>	Gallery/arts
<input type="checkbox"/>	Health care (incl. hospital, nursing, clinic, crisis care, addictions, etc)
<input type="checkbox"/>	Housing (long-term rental, assisted, etc)
<input type="checkbox"/>	Janitorial/cleaning (incl. street cleaning)
<input type="checkbox"/>	Landscaping/Gardening
<input type="checkbox"/>	Law, advocacy, politics

8.0 In which sectors does your Social Enterprise sell products and/or services?

Please check **all** that apply.

<input type="checkbox"/>	Movers/hauling
<input type="checkbox"/>	Personal services
<input type="checkbox"/>	Printing and publishing
<input type="checkbox"/>	Production/manufacturing
<input type="checkbox"/>	Professional services
<input type="checkbox"/>	Property Management
<input type="checkbox"/>	Public administration/services to government
<input type="checkbox"/>	Real estate (development and management)
<input type="checkbox"/>	Repair and Maintenance
<input type="checkbox"/>	Research
<input type="checkbox"/>	Retail sales (incl. Thrift stores)
<input type="checkbox"/>	Scientific/technical services
<input type="checkbox"/>	Services to private businesses
<input type="checkbox"/>	Services to social enterprises, cooperatives, non-profits, charities and their employees
<input type="checkbox"/>	Sewing
<input type="checkbox"/>	Social services (incl. income, social work)
<input type="checkbox"/>	Sports and Recreation
<input type="checkbox"/>	Theatre/performing arts
<input type="checkbox"/>	Tourism
<input type="checkbox"/>	Transportation and storage
<input type="checkbox"/>	Waste management (incl. recycling)
<input type="checkbox"/>	Wholesale sales
<input type="checkbox"/>	Other (please specify) _____

9.0 Which of the following demographic groups does your Social Enterprise train, employ or provide services to as part of your mission?

Please check **all** that apply:

<input type="checkbox"/>	All the people living in a particular place / community
<input type="checkbox"/>	Aboriginal / Indigenous people
<input type="checkbox"/>	Children
<input type="checkbox"/>	Ethnic group / minority
<input type="checkbox"/>	Family
<input type="checkbox"/>	Homeless persons
<input type="checkbox"/>	Immigrants (including temporary workers, permanent residents, etc)
<input type="checkbox"/>	Lower income individuals
<input type="checkbox"/>	Men
<input type="checkbox"/>	People living with addictions
<input type="checkbox"/>	People living with employment barriers
<input type="checkbox"/>	People living with psychiatric disabilities
<input type="checkbox"/>	People living with intellectual disabilities
<input type="checkbox"/>	People living with physical disabilities
<input type="checkbox"/>	Refugees
<input type="checkbox"/>	Senior / aged / elderly
<input type="checkbox"/>	Women
<input type="checkbox"/>	Youth / young adults / students
<input type="checkbox"/>	Other (please specify) _____

9.1 - 9.3 We would like to know about how many people in the target populations listed in Question 9.0 you trained, employed or provided with services.

It is okay to count the same person in more than one category.

Estimated totals are acceptable.

Do not include people who are exclusively the retail customers of your Social Enterprise.

9.1 From the groups listed above, in 2013, how many people did you train?	_____
9.2 From the groups listed above, in 2013, how many people did you employ?	_____
9.3 From the groups listed above, in 2013, how many people did you provide services to?	_____

10.0 How many people were employed or volunteering at your Social Enterprise during 2013?

Estimated totals are acceptable.

Please include those who you employed as part of your mission (see question 9.3):

Full-time paid employees (30 or more hrs/week)	_____
Part-time paid employees (less than 30 hrs/week)	_____
Seasonal employees (30 or more hours per week for more than 2 weeks but less than 8 months)	_____
If known, TOTAL FTEs (full time equivalent employment at 2,000 hours p.a.)	_____
Freelancers and contract workers (hired for a specific project or term)	_____
Volunteers (incl. unpaid interns, etc) who worked 10 or more hrs/month	_____
Volunteers (incl. unpaid interns, etc) who worked less than 10 hrs/month	_____

11.0 We would like to know about the revenue and expenses in 2013 of your Social Enterprise.

Estimated totals are acceptable.

Please fill in as much detail as you can, and round off amounts to the nearest \$1,000.

	REVENUE	
	Revenue from sales of goods and services, including service contracts with government	_____
	Revenue from grants and donations received from parent organization (do not include loans)	_____
	Revenue from grants and donations from other organizations and private individuals (do not include loans)	_____
	Other Revenue	_____
	Total revenue from all sources in 2013	_____
	EXPENSES	
Total wages and salaries paid, including target groups in training within your Social Enterprise	_____	
Total financial transfers to parent organization, if applicable	_____	
	All other operating expenses	_____
	Total expenses on all items in 2013	_____

12.0 What were the sources of **grants and donations** received in 2013?

*Please check **all** that apply:*

	<input type="checkbox"/>	Foundations
	<input type="checkbox"/>	Federal government
	<input type="checkbox"/>	Provincial government
	<input type="checkbox"/>	Municipal government
	<input type="checkbox"/>	Private individuals, philanthropists, donors
	<input type="checkbox"/>	Bank
	<input type="checkbox"/>	Corporations/Private businesses
	<input type="checkbox"/>	Parent organization
	<input type="checkbox"/>	Credit Union
	<input type="checkbox"/>	Community Futures/ CBDC
	<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received	

12.1 What were the purposes of **grants and donations** received in 2013?

*Please check **all** that apply:*

	<input type="checkbox"/>	Training, and technical assistance
	<input type="checkbox"/>	Operations and program/ service delivery
	<input type="checkbox"/>	Governance and management (e.g. strategic planning)
	<input type="checkbox"/>	To research, develop, implement or expand a product or service

12.1 What were the purposes of **grants and donations** received in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Capital project (e.g. new land, building, equipment, upgrades/ retrofit)
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received

12.2 What were the sources of **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Foundations
<input type="checkbox"/>	Federal government
<input type="checkbox"/>	Provincial government
<input type="checkbox"/>	Municipal government
<input type="checkbox"/>	Private individuals, philanthropists, donors
<input type="checkbox"/>	Bank
<input type="checkbox"/>	Corporations/Private businesses
<input type="checkbox"/>	Parent organization
<input type="checkbox"/>	Credit Union
<input type="checkbox"/>	Community Futures/ CBDC
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No loans/ debt instruments taken out

12.3 What were the types **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Operating line of credit
<input type="checkbox"/>	Repayable equity
<input type="checkbox"/>	Long-term loans / equity
<input type="checkbox"/>	Short-term loans
<input type="checkbox"/>	Other (please specify) _____

12.4 What were the purposes of **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Training, and technical assistance
<input type="checkbox"/>	Operations and program/ service delivery
<input type="checkbox"/>	Governance and management (e.g. strategic planning)
<input type="checkbox"/>	To research, develop, implement or expand a product or service
<input type="checkbox"/>	Capital project (e.g. new land, building, equipment, upgrades/ retrofit)
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received

Please take a few minutes to complete this last section of the survey. It is an excellent opportunity to tell us about the opportunities and challenges your IF(LIST_SIZE(Ethics,1,"-")>=4... may be facing in the next one to three years.

Governance Challenges						
		Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
	Internal expertise to drive success	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Board of director involvement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Legal and regulatory considerations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Meeting our organizational mission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Financial Challenges						
		Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
	Access to Loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Access to Grants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Budgeting and accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Cash Flow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Revenue diversity/ mix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Operational Challenges						
		Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
	Business planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Logistics for production and/or distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Sales of products and/or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Human resources (e.g. training, qualified staff, employee and/or volunteer recruitment and retention)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Internal resources (e.g. equipment, facilities)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Information technology (e.g. computers, software, and website)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Marketing Challenges						
		Not a Challenge	Small Challenge	Moderate Challenge	Significant Challenge	Not Applicable
	Contract procurement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Access to customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advertising/publicity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Brand recognition and awareness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there any other challenges you would like to note?	<input type="text"/> <input type="text"/> <input type="text"/>
--	--

What educational resources, support, and training would be relevant and useful to your IF(LIST_SIZE(Ethics,1,"-")>=4... ? Please rate each suggested resource.

Governance resources, support, and training

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Legal and regulatory advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Board development to build organizational capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Financial resources, support, and training

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Access to investment sources (e.g. loans)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Serving both financial and social purposes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Financial planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Tools to measure financial impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Operational resources, support, and training

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Information Technology (IT)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Organizational growth and capacity building strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Tools to enhance staff and/or volunteer capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Tools to measure social, cultural and/or environmental impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Marketing resources, support, and training

		Not helpful	Somewhat helpful	Helpful	Very helpful	Not Applicable
	Communications/public relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Networking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Online marketplace to sell products and/or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there any additional resources, support and training needs you would like to bring to our attention?

<hr/> <hr/>	
-------------	--

THANK YOU FOR YOUR PARTICIPATION!

If there is any information that you wish to add to the questionnaire response and are unable to do so, please e-mail Brittini Kerluke, at brittini.kerluke@tricofoundation.ca or call Brittini at (403)228-6756 ext 3

Once the final survey report has been prepared you will be sent a link so it can be downloaded

Please use this space to make any comments or suggestions

<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
