

**Social Enterprise for Sustainable Communities
FINAL Report to Ontario Trillium Foundation**

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Executive Summary and Collective Evaluation of SESC

Project overview

The project goal is to incubate social enterprise as an important component of (re)building sustainable communities. London, Ottawa and Sarnia, each at a different stage of social enterprise development, will share learnings with each other and other communities through workshops, case studies and a web-based learning platform.

Most important thing

From the perspective of all three communities, the most important outcomes include:

- a) Increased awareness of the possibilities that social enterprise can offer (both nonprofit and business sectors)
- b) Our own learning as intermediaries
- c) The availability of a central community knowledge hub for social enterprise
- d) An emerging trend in traditional thinking within the nonprofit sector to have different perspectives, use different tools, seek innovative ways to deliver on their mission

A common theme across all three communities is that the SESC funding allowed us to grow with the sector, as social enterprise capacity builders. Over the three years that this project was operational, social enterprise flourished as a sector and a concept:

- The province now has an Office for Social Enterprise.
- The federal government is exploring social finance concepts.
- Business schools are incorporating social innovation into their curriculum.
- There is a palatable rise in social entrepreneurship present with young people as an option to employment.

While the building of awareness in the community was an outcome for all of us, an even more important thing was the learning, relationship-building, culture-shifting and growth that occurred within our own organizations and teams. The creation of a social enterprise support system is not a static thing. It evolves with the needs, the quality and depth of supports provided elsewhere that are not to be duplicated and the appetite for social enterprise. Our communities need a 'hub' where they know is the go-to place for all things social enterprise.

The project has been successful in delivering on our outcomes

<p>A community-level strategy for social enterprise incubation and integration, based on the community stage.</p> <p>Increased capacity for local groups to undertake social enterprise.</p>	<p>Our three communities were at three different stages:</p> <ul style="list-style-type: none"> a) Sarnia: readiness b) London: intervention c) Ottawa: assessment <p>Sarnia, which was entirely volunteer run, explored and grew in their understanding of social enterprise. An organization has not yet surfaced to lead the community to the next phase, but awareness was achieved.</p> <p>In London, our community has grown in its ability to provide supports to social entrepreneurs and nonprofits seeking to develop social enterprises. Pillar Nonprofit has emerged as a hub for connections, learning and social enterprise supports. Ivey, through Dr. Oana Branzei, has established a strong rapport with community groups and is producing a significant number of social entrepreneurs from their student body. United Way remains committed to supporting the social enterprise and social finance movements we have created.</p> <p>In Ottawa, CISED has shifted from being a collaborative to a newly created legal entity. They continue to evolve in their ability to support social enterprises.</p>
<p>Protocol / online guides / learning platform / sharing of resources</p>	<p>SEOntario.org has more than fulfilled our expected deliverable for this online province-wide tool. All three communities have become engaged in province-wide networks to share learning, resources and tools. Ottawa and London are involved in OSER, the Ontario Social Economy Roundtable that networks backbone organizations and intermediaries in the sector.</p> <p>Twitter has also been valuable in learning and sharing.</p>
<p>Increased the awareness</p>	<p>All three communities have successfully increased awareness.</p>
<p>Funding for social enterprise</p>	<p>Social Finance London will continue to explore ways to increase funding opportunities for social entrepreneurs. United Way London Middlesex continues to have grants available for social enterprise.</p> <p>In Ottawa, the Community Loan Fund continues to build its capabilities to fund social enterprises.</p>
<p>Increased cross-sector collaboration between nonprofit, education, business and government sectors</p>	<p>The project has been significant in contributing to increased cross-sector collaboration. In London, we have engaged all sectors in our Advisory Committee and in Social Finance London.</p>

Social Enterprise for Sustainable Communities Achievements

Detailed achievements follow this summary. Here, we wanted to bring to light the most important outcomes of the project.

Expected Results	Performance Indicators	Achievements
Development of a province-wide strategy for stimulating social enterprises.	Interviews completed. 30 - 50 participants at each community meeting.	Oana and the Ivey team conducted more than 50 interviews to gather the data needed for their community case studies
	Sustainability plans completed for each community and for the project.	<p>London: Community Connection for Social Impact funded for 2 years by OTF, Social Innovation Shared Space, Social Finance London</p> <p>Sarnia: Will continue to provide resources, education, awareness through several community groups to include within their existing offering.</p> <p>Ottawa: CISED incorporated as a non-for-profit entity and has new funding from OTF.</p>
	Grant proposal submitted and accepted.	London and Ottawa received new funding.
Increased understanding of the role social enterprises play in (re)building	5 - 10 media hits about the social enterprise protocol including ethno-cultural media.	<p>We exceed 10 media hits in the following topics:</p> <ul style="list-style-type: none"> • Socialsca.pe mapathon • Coupons for hunger • Textbooks for change • Impact junk solutions • Socialfinance.ca blog • 6 blogs by Chris Moss • Fast company article about SE tour • World forum pitch competition for our Social Innovation Shared Space • Radio interview • Pioneer's post article about pitch competition • Oana's videos prepared for Impact Junk and Coupons for Hunger <p>SEOntario.org promotions; includes Pillar</p> <p>Ottawa: increased website presence</p>
Establishment of a province-wide protocol for community planning for incubating and integration social enterprises.	Final protocol completed and disseminated, including readiness assessment, strategic planning process, cross-sector dialogue and partnership models,	Over the course of 2013, the deliverable shifted, as other social enterprise backbone organizations across Ontario collaborated to create and deliver a robust online tool called SEOntario.org. We leveraged our OTF funding (LIAISON, MEDTE, SESC) to collectively build this new website, which was launched late 2013. The website includes

	financing and scalability, survey results and learning resources.	case studies of social enterprises and it will include the intensive community case studies and the research completed by Oana Branzei.
	Protocol shared with at least 2 - 4 other provincial and national networks.	SEOntario.org has been launched and is being used across the province. As it is new, we do not as yet have reporting on who has used it. Some surrounding communities such as Brantford have also received some coaching from Chris Moss.
	3 - 4 other communities in the province access the protocol.	
Increased social enterprise interventions in three local clusters. (Ottawa, London and Sarnia)	<p>London – 6 workshops delivered with 30 - 50 participants per session, subsidies accessed. 5 - 10 organizations apply for technical assistance and 2-3 selected.</p> <p>SROI surveys for 2 - 3 new and 2 - 3 existing social enterprises.</p> <p>Number of jobs created tracked.</p>	<p>London delivered 3 workshops in 2013 (SE tours), and several custom board workshops.</p> <p>We provided technical Assistance grants to Impact Junk Solutions, Coupons for Hunger, Clothingworks, Daya Counselling.</p> <p>While this is a new area of research, we have not found a system that has been widely adopted by our community.</p> <p>Each social enterprise that we worked with created new employment however, tracking the new number of jobs has been challenging and are ever changing. While we are unable to estimate the total jobs created by this project, we do know that Impact Junk created 14 new jobs for people with mental health issues. Our project was a significant support in launching Impact Junk.</p>
	Sarnia - workshops held and technical assistance and business planning accessed by social enterprises.	<p>8 events were held in total (All day Bootcamp, Social Finance session for funders, Socialscape, MaRS bus tour, Speaker series - Tal Dehtiar. Allyson Hewitt, Joe Mancini and local Social Enterprise.</p> <p>Documents, videos and website links were shared widely throughout the community.</p>
	Business plan completed in Sarnia.	<p>According to the Sarnia Roundtable, "It was difficult to find an organization to carry the activities forward. It was decided to focus on providing as much education to various organizations within the community to include within their existing offering."</p> <p>Sarnia Lambton Business Development Corporation and Sarnia Lambton.on.ca and the Sarnia Chamber of Commerce have expressed interest in moving social enterprise forward as part of their economic development plans.</p>
	Fund development goals met in 3 communities, with \$75,000 raised in London.	United Way London & Middlesex has earmarked \$25,000 annually for 3 social enterprises for 3 years but no funds have yet been distributed.

		Momentum is only now starting to build in readiness for social enterprise by registered charities meeting United Way's criteria.
	Project evaluation report completed and disseminated. Project report completed and disseminated.	All three communities have completed and submitted their final evaluation reports.

2013 London Final Report

Prepared by Chris Moss and Lina Bowden, Pillar Nonprofit Network

1. *What was the most important thing that happened as a result of your grant?*

Over the three years of the grant, we have matured and shifted our own thinking around social enterprise, what it is and it can be a tool – whether nonprofit, for-profit, co-op. We have built a strong sense of community around social enterprise, drawing out social entrepreneurs, connecting people with interest in social change and Pillar is well known now, as the place to go for anything social enterprise.

We have built a sophisticated knowledge and understanding of what capacity building needs there are in our community as it relates to social enterprise and what pivotal supports are needed.

We are well connected locally, provincially and federally in this space of social enterprise.

To sum up, the SESC grant has given London, Ontario a viable, well-functioning support vehicle that fits well within the local and sector eco-system as ‘the’ place to go to be nurtured and to explore social enterprise.

2. *Describe how your community or the people you serve benefited from your OTF grant. How did it make a difference?*

- We have been successful in shifting of attitudes and knowledge. Today, nearly everyone knows what social enterprise is now and the community understands it. Three years ago it was a nascent concept, even though several social enterprises existed.
- The work of SESC project was the impetus to start Social Finance London, a collaborative to increase opportunities for community benefit investments.
- Pillar’s growing expertise and connections with social enterprise fueled the initiative and community momentum to push forward with a social innovation shared space
- the SESC project led to Pillar bringing the Princes Seeing is Believing Tours to London, which strengthened the relationship with the city’s Chamber of Commerce. From this work to engage corporations in community building, the Chamber of Commerce Business Achievement Awards asked Pillar to lead the development of a new Corporate Social Responsibility Award, which has become part of the Annual Business Achievement Awards program.
- We held numerous Social Enterprise Tours, giving a real live view of social enterprise on the inside. A significant success was being recognized by Fast Company with the attached article <http://www.fastcompany.com/3018838/how-to-be-a-success-at-everything/how-a-great-field-trip-makes-new-ideas-brilliantly-bloom>
- The SESC project helped expand the opportunity for the community to learn from the building knowledge base at Ivey around social innovation and from the Ivey students.
- Our own team has matured in its understanding of what supports are needed in our community.

- Through the engagement of key individuals in our community on our advisory committee, we have gained commitment to move forward as a 'Solutions Table', adding more structure to our process of intake and assistance to social entrepreneurs.
- And last but not least, social entrepreneurs and change makers have experienced the power of having like-minded people around them. It is an important benefit to not feel like they are crazy and alone.
- We were thrilled with the result of SEOntario.org, a direct expected outcome of this project. The SEOntario website is a community-driven showcase of social enterprise (SE) and the social economy in Ontario. With a platform created by a collaboration of regional, provincial and national nonprofit organizations, SEOntario demonstrates the geographic scope and community impact of social enterprise across the province. With a showcase of examples of social enterprise work and a geo-mapped searchable database to explore various types of social enterprise in different regions, it connects to a wide range of resources, marketplaces and events, and provides regional, francophone and co-operative supports.

3. *Is there advice that you would give to another organization doing a similar project? What did you learn? Would you do anything differently the next time?*

- a) We would propose an ecosystem approach, whereby the social entrepreneur receives the supports together (not necessarily by one organization) but as a wrap around by the community, with organizations working together as a community, providing their own areas of expertise as needed. Every community needs a "connector/coach", whose strength is communication and networking, fearlessly plugging into the network. A power networker can ignite excitement in the community, engaging it. The coach should be able to do lots of public speaking, be excellent with media and awareness building.
- b) We learned to "not rush to the money" – as was evidenced in our efforts to 'spend' the United Way grant. Creating capacity and awareness first is important, as is the acknowledgement that this is an emerging field. Avoid getting hung up on definitions and walls, be ready to participate with others in shaping this space and being fluid to change as needed.
- c) For communities starting this work to create a social enterprise support system, intermediary or backbone organization, it would be important to seek out your social entrepreneurs in your community (for-profit and non-profit). Get to know their stories because it will inspire you and others and engage them in the process of building the supports because they know best what is needed.
- d) Use experiential learning - do Social Enterprise Tours, Executive Director's learn from Executive Director's and clients who are living it.

During the course of this project, we have formed well over 100 new relationships that lead to networks in the entrepreneurship sector in London, Ontario partnerships ranging from sharing of information to referrals. Some of these include:

- Small Business Centre
- London Economic Development CorporationEDC
- London Chamber of Commerce
- Hacker Studios
- Techalliance
- Start up London
- Community Futures Development CorporationCFDC
- Unlab/Unlondon
- Social Spark
- BizInc
- Nspire (Western University Chapter)
- Enactus (previously SIFE or Students in Free Enterprise)
- Ivey Entrepreneurs (HBA and MBA)
- RISE
- Social economy networks across Ontario and Canada
- CCEDNet
- Paro
- Toronto Enterprise Fund
- Enterprising Nonprofits (Enp)np
- OSER (Ontario Social Economy Roundtable)
- MaRS, Centre for Impact Investing, Social Innovation Generation at MaRS
- Centre for Social Innovation, Toronto
- University of Toronto, Centre for Social Economy
- Aperio
- In Guelph, WPB, LIP, EcDev
- ONCo-op
- YES Employment Services
- Hamilton Executive Directors' Aboriginal Coalition
- COIN
- Ministry of Economic Development Trade & Employment (MEDTE) Office of Social EnterpriseMEDTE
- Human Resources Skills Development Canada (HRSDC) RSDC
- Social Enterprise Council (London to host 2015 SE Conference)
- MaRS: Social Innovation Generation, Centre for Impact Investing

4. Individual Impact: Did your grant result in any observed behaviour change among those individuals that directly benefited from your grant? Please check all that apply.

- Stronger cultural awareness
- ✓ **A greater sense of community belonging**
- ✓ **Increased awareness of community resources**
- Enhanced communications skills
- Participation in workforce
- Development of life skills
- ✓ **Enhanced self-confidence/esteem**
- Enhanced success for students and learners
- Enhanced physical activity
- Other

5. Organizational Impact: How did your organization benefit from your OTF grant? Please check all that apply.

- ✓ **Enhanced capacity to deliver service and programs**
- ✓ **Increased number of partnerships / networks formed in the community**
- ✓ **Increased membership in your organization**
- ✓ **More active participation of members in your organization**
- ✓ **Improved staff training and development**
- Enhanced technological capacity
- Enhanced organizational and/or strategic planning
- Enhanced organizational stability
- ✓ **Raised profile of your organization**
- ✓ **Increased funds raised**

Other benefits to Pillar:

- By leading this project, Pillar has incorporated an entrepreneurial approach to our consulting practice and workshops, in our work to create healthy, resilient nonprofits.
- We have created a deep social enterprise support system that will continue to reap benefits, through Community Connections for Social Impact (a 2 year grant from OTF) and through a newly created consulting firm by Chris Moss.
- One of our biggest successes is that London is now well versed in the capabilities of social enterprise and we have seen some success stories. Throughout the last 3 years Pillar has been recognized as a leader in social enterprise locally and within the sector across the province.
- While a separate initiative, the SESC project has helped us build Pillar's profile in the social innovation field through the social innovation shared space initiative, also led by Pillar.

6. If you indicated new partners, how many new partnerships?

During the course of this project, we have formed well over 100 new relationships that lead to partnerships ranging from sharing of information to referrals. Some of these include:

- a) networks in the entrepreneurship sector in London, Ontario
 - a. Small Business Centre
 - b. London Economic Development Corporation
 - c. London Chamber of Commerce
 - d. Hacker Studios
 - e. Techalliance
 - f. Start up London
 - g. Community Futures Development Corporation
 - h. Unlab/Unlondon
 - i. Social Spark
 - j. BizInc
 - k. Nspire (Western University Chapter)
 - l. Enactus (previously SIFE or Students in Free Enterprise)
 - m. Ivey Entrepreneurs (HBA and MBA)
 - n. RISE
- b) Social economy networks across Ontario and Canada
 - a. CCEDNet
 - b. Paro
 - c. Toronto Enterprise Fund
 - d. Enterprising Nonprofits (Enp)
 - e. OSER (Ontario Social Economy Roundtable)
 - f. MaRS, Centre for Impact Investing, Social Innovation Generation at MaRS
 - g. Centre for Social Innovation, Toronto
 - h. University of Toronto, Centre for Social Economy
 - i. Aperio
 - j. In Guelph, WPB, LIP, EcDev
 - k. ONCo-op
 - l. YES Employment Services
 - m. Hamilton Executive Directors' Aboriginal Coalition
 - n. COIN
 - o. Ministry of Economic Development Trade & Employment (MEDTE) Office of Social Enterprise
 - p. Human Resources Skills Development Canada (HRSDC)
 - q. Social Enterprise Council (London to host 2015 SE Conference)
 - r. MaRS: Social Innovation Generation, Centre for Impact Investing

7. Community Impact: How did your grant benefit your community, clients or participants?
Please check all that apply.

- Created economic opportunities in your community
- ✓ **Enhanced services, programs or events**
- Increased participation in community life by removing barriers to participation (i.e., financial, social, cultural and linguistic barriers)
- ✓ **Enhanced awareness or profile of issue**
- Enhanced or strengthened the local environment (land, water, air, energy conservation, etc.)
- Increased physical access to buildings, facilities
- Enhanced volunteerism by recruiting, training or diversifying the volunteer base
- Enhanced organizational responsiveness to the community
- Made better use of community facilities or land by repairing, renovating or making them available to community groups

8. Did your grant have any broader impact on the not-for-profit or voluntary sector in your community or in the sector in which you operate? Please check all that apply.

- ✓ **Enhanced effectiveness of the broader not-for-profit or voluntary sector in your community**
- ✓ **Advanced the knowledge or resources available to other not-for-profits in your community**
- ✓ **Established a model that will be used by other not-for-profit or voluntary organizations**
- ✓ **Enhanced the responsiveness, resiliency and relevance of the broader not-for-profit or voluntary sector in your community**

9. Number of employment positions (Please report in FTEs, Full-Time Equivalents) funded in your organization through your OTF grant:

Our grant funded one full-time staff member.

10. Statistics: London

The Statistics Tables that follow respond to the following OTF questions:

- *How many people directly benefited from your grant?*
- *How many new programs, activities or events were you able to offer as a result of your grant?*
- *Did your initiative receive any media coverage?*
- *Volunteer Contribution*
 - *How many volunteers directly contributed to the initiative funded by your grant?*
 - *Hours Contributed*
 - *New Volunteers Recruited*
 - *New Volunteer Training #*

Notes/Definitions:

SE = Social Enterprise

Year One: Feb 14 - Sept 31, 2011

Year Two: Oct 1, 2011 - Sept 31, 2012

Year 3: Oct 1, 2012 – Dec, 2013

Statistics: London**1.1 Benefits to Participants**

Deliverables	Year 1	Year 2	Year 3	Total
One-on-One Coaching:				
# Unique individual	47	57	41.0	145.0
# Social entrepreneurs	18	25	23.0	66.0
# Nonprofit leaders (combined NPO & charities)	29	32	18.0	79.0
Total Coaching Hours	82.5	153	158.0	393.5
Workshops:				
# Workshop Participants	270	398	625.0	1293.0
# Hours of Workshops	28	77	52.5	157.5
Events:				
# Events	4	14	14.0	32.0
# Hours involved	20	52	44.0	116.0
# Event Participants	307	1195	800.0	2302.0
# New programs due to grant (SE PD, SEE)	2	0	0.0	2.0
Volunteers:				
# Volunteers	3	4	26	9.0
# Volunteer hours	300	50	1764	2114
# New volunteers over previous year	0	2	1.0	3.0
# Hours working with provincial partners	40	41.5	34.0	115.5
# Advisors we met with	31	24	25.0	80.0

****see MS Excel document for more details.**

1.2 In Kind & Non-financial Support: London

Estimated Value (\$)	Year 1	Year 2	Year 3	Total
Donated space and utilities:				
<i>Social Enterprise Exchange at WOTCH (\$50 per)</i>	\$200	\$400	\$200	\$800
<i>Steering & Advisory Meetings at United Way (\$50 per)</i>	\$350	\$550	\$550	\$1450
Donated services:				\$0
<i>Legal</i>	\$500	\$1,000	\$1000	\$2,500
Did you generate any revenue as a direct result of your OTF grant?				\$0
<i>PD revenue</i>	\$3,890	\$440	\$40,000	\$44,330
<i>Consulting revenue</i>		\$723	\$10,000	\$10723
<i>Honorarium</i>		\$1,200	\$0	\$1,200

1.3 Earned Revenue received as a Direct Result of the OTF Grant

United Way has committed a total of \$225,000 towards social enterprise start ups over 5 years.

Pillar Nonprofit Network was awarded a consulting role in late 2013 by the Ontario Office for Social Enterprise at MEDTE, to facilitate a Social Enterprise Open For Business community consultation across the province.

London Community Foundation, Sisters of St. Joseph and United Way London and Middlesex have collectively committed \$15,000 to seed fund the work of Social Finance London in 2013.

1.4 Media Coverage

	Target:	Actual
Increased understanding of the role social enterprises play in (re)building sustainable communities.	20 media hits related to social enterprise these will include ethno-cultural media	We surpassed our target media hits in year 1. Throughout 2012 and 2013, we continued to have significant profile, through newspaper, video and web-based features.

10. Did you achieve all, some or none of your expected results (over the entire time of the grant)?

London Achievements:

Expected Results	Performance Indicators	Achievements
Development of a province-wide strategy for stimulating social enterprises.	Interviews completed. 30 - 50 participants at each community meeting.	Oana Branzei and the Ivey team conducted more than 50 interviews to gather the data needed for their community case studies.
	Sustainability plans completed for each community and for the project.	London has been approved for funding by OTF for two years for "Community Connection for Social Impact". Other sustainability plans include the creation of a Social Innovation Shared Space and of Social Finance London.
	Grant proposal submitted and accepted.	"Community Connection for Social Impact" submitted and accepted.
Increased understanding of the role social enterprises play in (re)building	5 - 10 media hits about the social enterprise protocol including ethno-cultural media.	We exceeded 10 media hits in the following topics: <ul style="list-style-type: none"> • Socialsca.pe mapathon • Coupons for hunger • Textbooks for change • Impact junk solutions • Socialfinance.ca blog • 6 blogs by Chris Moss • Fast company article about SE tour • World forum pitch competition for our Social Innovation Shared Space • Radio interview • Pioneer's post article about pitch competition • Oana's videos prepared for Impact Junk and Coupons for Hunger • SEOntario.org promotions; includes Pillar
Establishment of a province-wide protocol for community planning for incubating and integration social enterprises.	Final protocol completed and disseminated, including readiness assessment, strategic planning process, cross-sector dialogue and	Over the course of 2013, the deliverable shifted, as other social enterprise backbone organizations across Ontario collaborated to create and deliver a robust online tool called SEOntario.org. We leveraged our OTF funding to collectively

	partnership models, financing and scalability, survey results and learning resources.	build this new website, which was launched late 2013 at the Social Enterprise World Forum in Calgary Alberta.
	Protocol shared with at least 2 - 4 other provincial and national networks.	SEOntario.org is a provincial tool that will connect with more than 4 other provincial and national networks.
	3 - 4 other communities in the province access the protocol.	SEOntario.org has had a soft launch, but is yet to be widely promoted. An official launch of SEOntario is still pending this spring, after some needed upgrades. However, CCEDNet has confirmed that there have been over 1500 unique visitors to SEOntario.
Increased social enterprise interventions in three local clusters. (Ottawa, London and Sarnia)	<p>6 workshops delivered with 30 - 50 participants per session, subsidies accessed.</p> <p>5 - 10 organizations apply for technical assistance and 2-3 selected.</p> <p>SROI surveys for 2 - 3 new and 2 - 3 existing social enterprises. Number of jobs created tracked.</p>	<p>We hosted 3 workshops in 2013 (SE tours) and 3 custom board workshops. The attendance at the tours varied from one with small attendance (6) to one very well attended tour (35).</p> <p>Technical Assistance grants have been provided to Impact Junk Solutions, Coupons for Hunger, Clothingworks and Daya Counselling.</p> <p>Measuring social performance has been a topic of interest and learning for our team. We have found that SROI is one tool, but several are emerging and the experts in this space are learning as we are.</p> <p>We continue to look on with interest as the field of SROI and social performance measurement expands. At this stage, we were not in a position to apply SROI to our work.</p> <p>Each social enterprise that we worked with</p>

		created new employment however, tracking the new number of jobs has been challenging and are ever changing. While we are unable to estimate the total jobs created by this project, we do know that Impact Junk created 14 new jobs for people with mental health issues. Our project was a significant support in launching Impact Junk.
	\$75,000 raised in London.	United Way London & Middlesex has earmarked \$25,000 annually for 3 social enterprises for 3 years but no funds have yet been distributed. Momentum is only now starting to build in readiness for social enterprise by registered charities meeting United Way's criteria.
	Project evaluation report completed and disseminated. Project report completed and disseminated.	London's report completed February 5, 2014.

11. If there were any unanticipated results, positive or negative from your work, please describe them.

- a) SEOntario.org - launch with Dr. Eric Hoskins, added MEDTE funding enabled this to be at a larger scale and a province collaborative bigger than we envisioned.
- b) Emergence of Social Finance London, bringing together London's key stakeholders in creating a social finance movement
- c) Pillar was asked by the Province to facilitate the Open for Business Process for Social Enterprise
- d) Chris Moss has launched her own consulting practice, and will continue to work in the social enterprise sector locally and provincially. We are multiplying the level of resources in our community and we have created supports/expertise that can be leveraged across the province.
- e) The various community-based entrepreneurship supports (BizInc, Small Business Centre, Western Student Success Centre, Social Spark, Ivey Business School) are all seeing a rise in social purpose start ups. We feel this project has had an impact on several individuals who have a better chance of exploring their social business idea with our support.

12. Continuing Activities: Do you expect the activities resulting from your grant to continue once your grant ends?

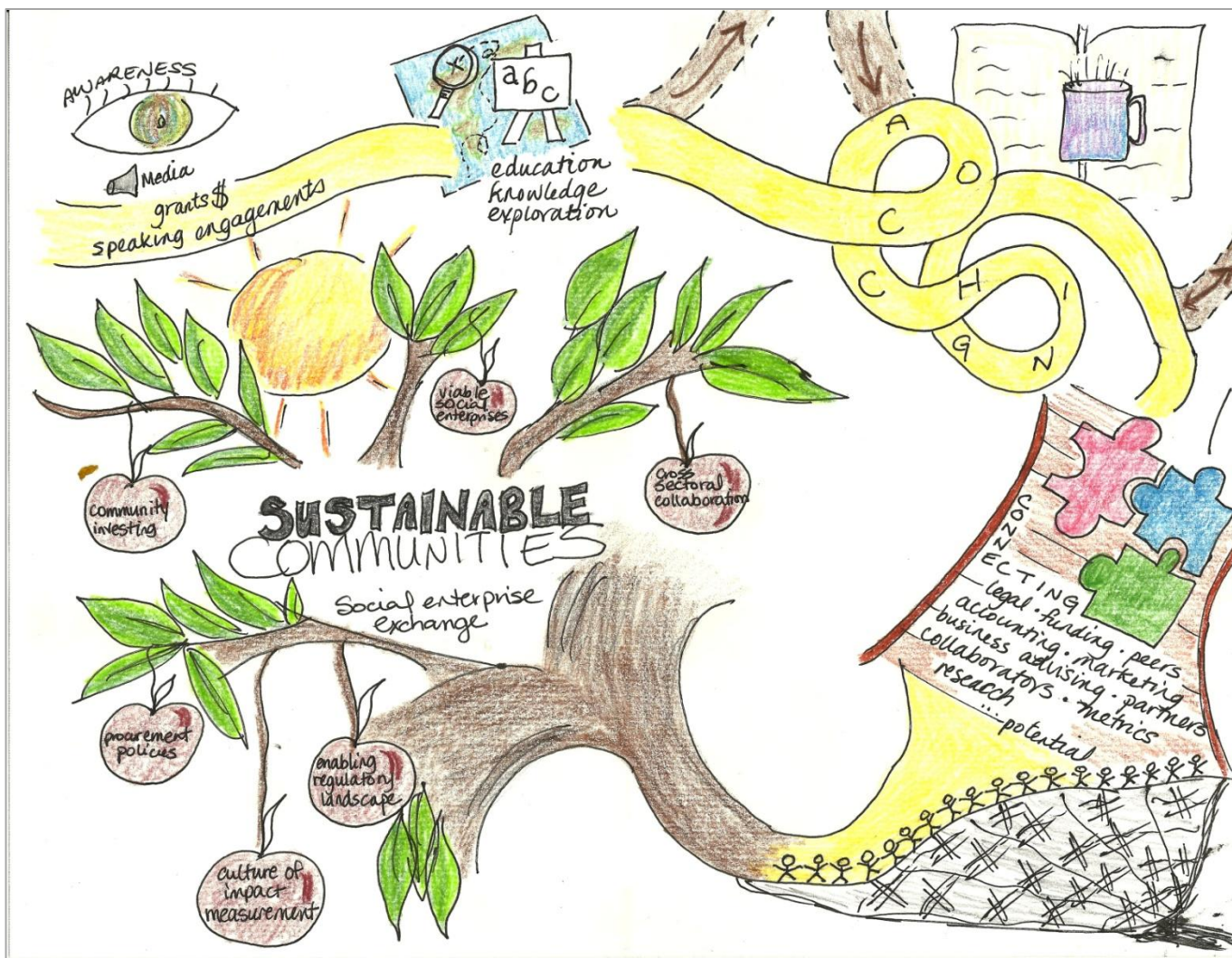
- a. The newly OTF-funded program: Community Connections for Social Impact will continue the work of SESC for another two years. We have hired a new staff member at Pillar Nonprofit Network (Lore Wainwright) who will provide and coordinate the coaching and advisory services.
- b. The continued support offered from Chris Moss as a consultant will also leverage our learning over the last three years to continue and create additional supports to the broader community and other provincial communities in social enterprise.
- c. Once our social innovation shared space opens its doors, more programming and support systems will be available to change makers and social entrepreneurs.
- d. Social Finance London will continue and evolve including a submission to the Office of Social Enterprise (MEDTE) for a demonstration fund for social enterprise.
- e. Pillar will continue its relationships with other provincial intermediaries.
- f. We are working more closely with Cara Finn and Community Futures Development Corporation, to support more intensely social enterprise in Middlesex County.
- g. We will continue to seek ways to partner and collaborate with Goodwill social enterprise centre.

Additional Information

Support System

In an attempt to explain the support system we use when working with a nonprofit exploring social enterprise, this illustration was drawn.

- Step One:** Awareness of social enterprise is created by speaking engagements, grant offerings, and media. Nonprofit leaders choose at that stage to get “on the yellow brick road” or not.
- Step Two:** Along the road, they move towards education. They take workshops, have meetings with their boards and staff and continue to learn whether social enterprise is a viable option for their organization.
- Step Three:** If the organization is ready, it begins coaching with the Social Enterprise Program Manager and works through different portions of readiness, idea exploration, feasibility and business model planning. This portion of the road is a challenge and is a lot of work.
- Step Four:** It will be connected with many resources and advisors in the community who understand or can help. These connections make its initiative a bit easier to maneuver.
- Step Five:** Joining the social enterprise exchange, monthly meetings become a community whereby many different concepts are explored, discussed and possibly implemented.



2013 London Final Report – United Way Evaluation

Prepared by Janet Tufts, United Way London & Middlesex

1. *What was the most important thing / how did people benefit from the OTF grant?*

From United Way's perspective, the most important thing that happened as a result of the OTF grant was having the opportunity to explore/test/build a model/process to determine organizational readiness and then move forward in applying for start-up funding through our organization. There were some real lessons learned.

London/Middlesex community has benefitted from the Social Enterprise for Sustainable Communities (SESC) initiative through enhanced awareness of social enterprise, social entrepreneurship and social innovation as a means to address social issues.

2. *Is there advice that you would give to another organization doing a similar project? What did you learn? Would you do anything differently the next time?*

As a result of this project, United Way learned that demand for social enterprise grants in London/Middlesex appears to lie with individual social entrepreneurs and nonprofit organizations. Few registered charities approached United Way for funding. However, this lack of demand may partially be the result of United Way's specific guidelines for investment. Eligibility for funding consideration includes the following primary criteria:

- Registered charitable status;
- The request must be for a new social enterprise at the pre-launch stage of development;
- The request could not originate from a member of the Advisory Committee;
- The social enterprise must be in alignment with United Way's Community Impact Agenda which focuses on outcomes associated with alleviating poverty, mental health issues and concerns faced by individuals in transition (including immigrant populations).

The demand for funding under the above guidelines was not strong during the SESC project. During the last three years, United Way was approached by several prospective individual and organizational grantees. As per a process developed by the SESC steering committee, prospective applicants were directed to the SESC program manager, who assisted in determining their "readiness" for a social enterprise venture and "eligibility" to apply to United Way for funding consideration.

While eligible applicants were invited to apply to United Way's social enterprise fund, only two proposals were submitted to United Way during the three-year period. One of these proposals was later withdrawn by the agency. The other proposal is currently under review.

3. *How many volunteers directly contributed to the initiative funded by your grant? Please do not give the total number of volunteers in your organization. (#volunteers, #hours contributed, #new volunteers)*

United Way engaged four volunteers in the review of social enterprise proposals. These three individuals have remained interested in social enterprise as members of our three Impact Councils. Each person has also been engaged in other "spin-off" events generated through the SESC partnership including United Way's microloans/matched savings initiative, case study research on payday loan businesses, Social Finance London (an off-shoot of the SESC project focused on alternative funding sources for social enterprise, entrepreneurship and innovation), Ivey Business School's RISE initiative (involving social enterprise and those with mental health concerns), and the Prince of Wales' *Seeing is Believing* Roundtable (which engaged our SESC partners along with local business and nonprofit leaders concerning the topic of social enterprise and mental health).

4. *Did your grant result in any observed behaviour change among those individuals that directly benefited from your grant?*

United Way has noted increased engagement from its community partners (developed and/or strengthened by the SESC initiative) particularly with respect to their involvement in "spin-off" events/activities that have been generated through the project (as noted in the answer to the previous question above).

5. *How did your organization benefit from your OTF grant?*

OTF's grant to the SESC initiative allowed United Way to both build and strengthen its relationships in the community (beyond its partners in the initiative, Pillar Nonprofit Network and the Ivey Business School). Engagement on the SESC Advisory Committee allowed United Way to cultivate new and existing relationships, creating opportunities to interact with local organizations differently than it has in the past. This has precipitated the development of additional connections for other (non-related) projects in the community.

The SESC initiative has also assisted United Way in significantly increasing its knowledge base and awareness of social enterprise as a tool for addressing social issues in our community.

Finally, involvement in the SESC initiative led United Way to establish specific guidelines for investment in social enterprise.

6. *Did you achieve all, some or none of your expected results (over the entire time of the grant)?*

United Way had hoped to establish multi-year funding relationships with at least three different registered charities over the three-year initiative. However, these funding relationships have not yet developed as few agencies have approached United Way for funding based on our eligibility requirements for investment. Regardless, United Way is actively seeking opportunities to make a funding commitment to a local social enterprise. We are hopeful that an investment opportunity will present itself before March 31, 2014.

7. *Do you expect the activities resulting from your grant to continue once your grant ends?*

Yes. While United Way will not be a formal partner in the next phase of the SESC project (to be led by Pillar Nonprofit Network), our organization will remain engaged in related activities and discussions. United Way will also seek to make an investment in a local social enterprise initiative led by a registered charity.

2013 Sarnia Final Report

Prepared by Alison McMahon, Sarnia Roundtable

8. *What was the most important thing that happened as a result of your grant?*

- The introduction of the social enterprise concept along with the educational/training opportunities throughout the grant.
- All parties were brought together from the beginning (Not for profits, business, government, community citizens & youth). The Committee focused on the broad definition of social enterprise, which was based on including all these sectors and not the definition that focused only on the Not for Profit sector.
- Social finance was introduced to local funders to create awareness of the concept in case any opportunities arose.
- Leaders within the SE sector were brought into the community to educate and provide real life examples of social enterprises.

9. *Describe how your community or the people you serve benefited from your OTF grant. How did it make a difference?*

- Linking to MARS – Allyson Hewitt was brought to Sarnia to speak and a bus trip to the MaRS Discovery District was also organized. Tal Dehtiar from Oliberte was brought back to the community a second time (after this grant brought him in the first).
- Opened people up to new possibilities by showcasing experts and the concepts of social enterprise, social innovation, social finance, and collective impact in general.
- Connected different sectors within the community (and in the future – www.Socialsca.pe). Local businesses were introduced to Not for Profit's for example.
- Highlighted local SE's to bring their cause to the forefront (I.e. Wawanosh making coffins)
- An Awesome Foundation chapter was launched in Sarnia.

10. *Is there advice that you would give to another organization doing a similar project? What did you learn? Would you do anything differently the next time?*

- A strictly volunteer organization takes a longer timeframe to accomplish the objectives
- It is important to have funding for some human resources to support the work
- In terms of sustainability, asking an organization to continue the work without future funding was difficult.
- Tried to integrate social enterprise within the existing supports within the community.
- We learned that sectors didn't have a clear understanding of each others perspectives (for example, Not for Profits thought profit was a dirty word and Business felt that Not for Profits had an unfair advantage)

11. How many volunteers directly contributed to the initiative funded by your grant? Please do not give the total number of volunteers in your organization. (#volunteers, #hours contributed, #new volunteers)

- 22 total volunteers contributed to the project.
- 564 hours were contributed.
- 12 new volunteers were recruited.

12. Did your grant result in any observed behaviour change among those individuals that directly benefited from your grant?

- The community has more opportunities to participate in Social Enterprise activities now
- During the timeframe of the project, an Awesome Foundation was started in the community and the Chamber of Commerce established a Social Profit group

13. How did your organization benefit from your OTF grant?

- It was an opportunity for the Community Round Table to continue to work across various sectors to support collaboration and awareness of the various sectors.
- The OTF grant supported the Community Round Table in moving forward on community goals such as collaboration and enhancing sustainability

14. How did your grant benefit your community, clients or participants?

- It helped strengthen community capacity and opened up doors for the various sectors to work together.

15. Did your grant have any broader impact on the not-for-profit or voluntary sector in your community or in the sector in which you operate?

- The various speakers and training sessions (Tal Dehtiar of Oliberte shoes, Allyson Hewitt from the MaRS Discovery District, Joe Mancini of the Working Centre in Kitchener, Lina Bowden with her expertise in social finance, the beginner and intermediate Bootcamps) provided opportunities for various sectors to be exposed to the SE concept and in some cases explore ways for their organization to become sustainable.
- Hands on training to learn strategies related to social enterprise
- Socialsca.pe has the potential to link those in our community to other local initiatives as well as similar initiatives across a broader geography

9. Did you receive any in-kind or non-financial support?

- \$2250 in in-kind support was received in terms of expertise, meeting space, and resources, was donated to the various events and initiatives

10. Did you receive any revenue as a direct result of your OTF grant?

- No revenue was generated.

11. Did you achieve all, some or none of your expected results (over the entire time of the grant)?

- Based on the original proposal we would suggest that Sarnia achieved some of the expected results.

12. If there were any unanticipated results, positive or negative from your work, please describe them.

- An Awesome Foundation chapter was created in our community.
- Members of our community are now linked with the MARs Discovery District, which enhances connections to resources, expertise, and potential opportunities to promote/sell products
- Stronger linkages between the not for profit sector and the Chamber of Commerce (during the timeframe of the grant, the Chamber started a Social Profit group), the Chamber also partnered with the Community Round Table on the bus trip to the MaRS Discovery District

13. Do you expect the activities resulting from your grant to continue once your grant ends?

- We feel the community has learned valuable skills to continue this work and have opened up the possibility for a number of not for profits to look at social enterprise activities to become sustainable.
- We've provided opportunities for local organizations to learn about the Social Enterprise concept. We hope that organizations such as Sarnia Lambton Economic Partnership, Sarnia Lambton Business Development Corporation and the Chamber of Commerce provide this support to their clients.

14. If you have additional comments related to this report, include them here.

- We have just heard back about the Who Cares Social Enterprise dvd and will be purchasing it. We will be organizing an event to show this in the future.
- The group is looking at supporting a Youth grant for business planning related to social enterprise through the Sarnia Lambton Economic Partnership.

15. Report on Grant results and performance indicators:

Outcome: Development of a province-wide strategy for stimulating social enterprises

Performance Indicators	Achievements
Sustainability plans completed for each community and for the project.	Sarnia: Created awareness and provided the tools to individuals, not for profits and community organizations to move the concept forward.
Grant proposal submitted and accepted.	Sarnia: Held a session for funders within the community to make them aware of the concept, to move the idea forward and support those looking at the Social Enterprise.

Sarnia - workshops held and technical assistance and business planning accessed by social enterprises.

Sarnia: 8 events were held in total (All day Bootcamp, Social Finance session for funders, Socialscape, MARS bus tour, Speaker series - Tal Dehtiar. Allyson Hewitt, Joe Mancini and local Social Enterprise. Documents, videos and website links were shared widely throughout the community.

Business plan completed in Sarnia.

Sarnia: It was difficult to find an organization to carry the activities forward. It was decided to focus on providing as much education to various organizations within the community to include within their existing offering.

Project evaluation report completed and disseminated. Project report completed and disseminated.

Report completed and submitted to Pillar Nonprofit January 15, 2014.

2013 Ottawa Final Report

Prepared by Brenda Richardson, Centre for Innovative Social Enterprise Development (CISED)

1. *What was the most important thing that happened as a result of your grant?*

At a sector level:

The formal documentation of the development path of each community via 3 case studies (yet to be reviewed by each partner and then finalized) will provide a valuable resource which can be utilized by each project partner as well as the broader social enterprise sector.

At an organizational level:

The shared learning with London, and to a lesser extent with Sarnia, around social enterprise development, both at the level of an intermediary and as a sector, as well as access to the academic thinking and support offered by the Ivey School of Business, provided CISED with new and expanded sources of expert and practical knowledge, thinking, and support.

2. *Describe how your community or the people you serve benefited from your OTF grant. How did it make a difference?*

As a result of this grant:

- ✓ CISED was able to substantially improve its web presence and social media capacity to serve social enterprises in Ottawa.
- ✓ CISED was able to incorporate learning from London into its programming and sustainability planning.
- ✓ CISED was/is able to access tools developed by the various partners in the project, in particular Ivey, to use in its work with the community.
- ✓ OCLF was able to advance its fund development activities and provide a small amount of capital for a Mission Multiplier Grant offered through CISED (as the Ottawa affiliate of ENP).

3. *Is there advice that you would give to another organization doing a similar project? What did you learn? Would you do anything differently the next time?*

- ✓ PILLAR was a strong lead in this project and appeared to have valuable added capacity as a result of its partnership with UW London and Ivey.
- ✓ Having the same staff at PILLAR for the duration of the project provided consistency and opportunities for incremental learning. Chris Moss was a knowledgeable and collaborative resource throughout the project.
- ✓ Having a “collaborative arrangement” with several parties that includes another “collaborative arrangement” is challenging, can create ambiguity, and requires at least one stakeholder to take on the coordination and administration for others. Any change in staff can lead to a disconnect in communications and expectations.
- ✓ Developing an annual joint workplan for all partners would be beneficial to outline expectations, clarify deliverables, and identify areas of common work and overlap.
- ✓ Establishing an effective and affordable means for regular exchanges of learning and updates, as well as reflecting and planning, would be useful. Regular reporting to each

partner serves a purpose but the real opportunity for innovation and reflective planning comes from being together and thinking together.

4. How many volunteers directly contributed to the initiative funded by your grant? Please do not give the total number of volunteers in your organization. (#volunteers, #hours contributed, #new volunteers)

CISED & OCLF: # of vols – 2, 14 hours, 1 new volunteer

5. Did your grant result in any observed behaviour change among those individuals that directly benefited from your grant?

The social enterprises that CISED works with are more inclined to access information about CISED and its activities via the CISED website and its related communications (ie e-newsletter, blog).

6. How did your organization benefit from your OTF grant?

- ✓ CISED was able to access the experience gained by London and Sarnia – both in the role of an intermediary and by looking at specific social enterprise examples in their communities.
- ✓ CISED benefited from the exposure and connections resulting from the work of PILLAR in the social enterprise sector both provincially and nationally.
- ✓ CISED was able to recoup a portion of the development costs for its original workshop series.
- ✓ CISED was able to expand its website and social media presence.
- ✓ OCLF was able to expand its fund development activities.

7. How did your grant benefit your community, clients or participants?

As a result of this grant:

- ✓ CISED was able to substantially improve its web presence and social media capacity to serve social enterprises in Ottawa.
- ✓ CISED was able to incorporate learning from London into its programming and sustainability planning.
- ✓ CISED was/is able to access tools developed by the various partners in the project, in particular Ivey, to use in its work with the community.
- ✓ OCLF was able to advance its fund development activities and provide a small amount of capital for a Mission Multiplier Grant offered through CISED (as the Ottawa affiliate of ENP).

8. Did your grant have any broader impact on the not-for-profit or voluntary sector in your community or in the sector in which you operate?

No.

9. Did you receive any in-kind or non-financial support?

CISED received in-kind support in the form of website development, a social media strategy, and ongoing coaching and support from a private sector company. The value of this in-kind support is estimated to be \$6000.00.

10. Did you receive any revenue as a direct result of your OTF grant?

No.

11. Did you achieve all, some or none of your expected results (over the entire time of the grant)?

- ✓ CISED shared its workshop materials with London and contributed to the knowledge sharing and collection activities led by Ivey.
- ✓ Marketing materials were developed by CISED in the form of an enhanced website and social media presence.
- ✓ OCLF expanded its fund development activities and participated in knowledge sharing activities with project partners.
- ✓ The original project description outlined the development of peer learning circles and mentoring in year 2 and 3. These tasks were not clearly defined and did not take place.

12. If there were any unanticipated results, positive or negative from your work, please describe them.

13. Do you expect the activities resulting from your grant to continue once your grant ends?

- ✓ It is expected that CISED and OCLF will continue to share knowledge, insights, and tools with London and Ivey, as well as Sarnia.
- ✓ Assuming funds can be raised to match in-kind support, CISED will continue to work with its private sector partner for further website development and expanded social media activities.

14. If you have additional comments related to this report, include them here.

The case studies are anticipated to be a rich source of information and learning, and the time to collect, analyze, and synthesize the data and information is understood and appreciated. That being said, finalization of the case studies does have a certain time sensitivity in order to provide maximum value for the individual project partners as well as the sector more generally.

15. Report on Grant results and performance indicators:

Expected Results	Performance Indicators	Achievements
	Sustainability plans completed for each community and for the project.	CISED incorporated as a nfp entity and has developed a plan for supporting social enterprise based of four business lines.
	Grant proposal submitted and accepted.	Yes – new funding received from OTF for CISED as a separate non-profit entity.

Increased understanding of the role social enterprises play in (re)building

Project evaluation report completed and disseminated.
Project report completed and disseminated.

Increased web presence that promotes the role and presence of social enterprise

Report submitted to Pillar Nonprofit on January 13, 2014.
