

Objectives of the Session:

- Together develop the theory of change
- Together develop the impact evaluation questions, tools and tactics
- Together develop the development evaluation questions, tools and tactics
- Have a clear understanding of what the next steps are and their involvement in the process

Participants:

8 Primary stakeholders from EPICentre at University of Windsor, Huron Small Business Enterprise Centre, Waterloo Region Small Business Centre, Pillar Social Enterprise.

Method:

Method was informed by the review of the literature and experience of the evaluation team. The day was divided into three main areas of focus:

- Co-developing a theory of change
- Co-developing an impact evaluation framework
- Co-developing a developmental evaluation framework

Co-development of a theory of change for the SESW:

1. definition of impact posted to facilitate shared understanding
2. participants were asked to write their organizations 4 to 5 key SESW-related activities on post it notes
3. these were shared and posted, and, as a group, similar activities were grouped and themed
4. participants were asked to identify the long term impacts they expect to result from these activities/what they hope to see change/contribute/added, writing their responses on post it notes
5. these were shared and posted, and as a group confirmed

Impact: the change, either positive or negative – inclusive of outputs and outcomes, that occurs for people and communities as the result of an activity or intervention

The purpose of the evaluation of SESW's impact is to assess the changes that occurred

Co-development of an evaluation planning matrix for impact evaluation:

1. draft key impact evaluation questions were presented for cross referencing with the program activities and outcomes
2. as a group exercise, participants were asked what evidence they would need to see to determine if the outcomes were being achieved
3. independently, participants identified how/if this data/evidence was currently being collected
4. data gaps were noted

Co-developing an evaluation framework for the developmental evaluation:

1. Individual reflection: Participants were invited to take 20 minutes to reflect on 3 questions:
 - a) What about social enterprise/enterprising have you learned since you've been involved in this project?
 - b) How have perceptions about social enterprises changed for you because of your involvement?
 - c) How has the model of supporting social enterprises shifted based on your ongoing experience from where you first started?
2. Group reflection: Learnings were discussed as a group with 2 to 3 most significant learnings recorded on butcher paper. This activity was captured by video recording
3. Draft developmental evaluation questions were presented for confirmation
4. Group discussion on options for gather feedback from primary stakeholders on an ongoing basis

Results

SESW-Related Activities by SESW Partner

Partner	Immediate Client group/customers	Activity Area				
		Direct support to SEs	Skill Development	Building Ecosystem	Learning and Development Business Professional Coaches	Networking for SE
Huron County SBC	Entrepreneurs Business Coaches	Coaching Supporting SEs Training SEs	Workshops and Events for SEs	Story sharing (blogs)	Business coaches receive training on SE	Meetups
Innovate Niagara	Business Coaches	Access to resources Mentoring	Workshops	Educating stakeholders Community outreach	Learning about SE	Meetups
EPICentre Windsor	Student entrepreneurs	Access to resources Mentoring	Workshops and Events	Educating stakeholders Community outreach	Business coaches receive training on SE	Provide networking opportunities for clients
Waterloo Region	Entrepreneurs Business Coaches	Connect to experts	Workshops and Events for Business Coaches	Outreach/communications Partnership outreach Community education Reveal SE actors in assets in region Identification of SE Ecosystem research	Development of best practices	Networking with existing SE stakeholders
Pillar SE Coach	SEs	Coaching	Workshops and Events for SEs, Nonprofits, Traditional Entrepreneurs Community education	Educating stakeholders as community outreach to increase presence of SE (examples: Workshops for entrepreneurs)	Supporting learning & development programming	Social enterprise meetups (i.e. Socialpreneur chats)
Pillar Digital	SEs	Online education	Online animation	Animating online conversations with key representatives of the entrepreneurial ecosystem	Promoting learning & development sessions through online platforms	Podcast series
The Pillar SESW Manager supports the partnership by: educating stakeholders, developing a core competency development program, managing and growing the social finance pipeline, facilitating regional meet ups, and relationship-management with investors, partners, stakeholders, vendors, and MEDG.						

Theory of Change

The theory of change for the SESW is guided by the following questions: what are we doing? for whom? and why it matters?

We are...	For...	So That ...(Outcomes)
Providing direct support in the form of coaching, access to capital, access to resources, mentoring, making connections	Entrepreneurs	SEs gain the skills, resources and network needed to be sustainable and impactful Entrepreneurs develop an SE mindset and act as SE champions and ambassadors
Providing relevant skills development in the form of workshops and events	Entrepreneurs including social entrepreneurs and community	Skills development workshops will be valuable, highly anticipated and sold out SEs will have the skills they need to run a sustainable/successful business and will be able to measure impact
Providing learning and development about SE in the form of workshops, professional development	Professional Business Coaches	Coaches will feel equipped to support SEs Coaches will be able to deliver training to others
Offering networking opportunities through monthly meet ups, online chats	Social entrepreneurs	Social entrepreneurs develop a self-sustaining peer support network Contribute to economic dynamics
Building the social enterprise ecosystem by: a) Promoting social enterprise and social entrepreneurship through: <ul style="list-style-type: none"> community outreach and education sharing SE stories revealing SE actors in assets in region identifying SEs helping others identify SEs b) Conducting ecosystem research	SE stakeholders, broader community, Potential partners Traditional entrepreneurs	a) SE presence in the community is increased b) A database/one stop shop is created and made easily and widely accessible Coaches know where to go for information and guidance to support the SE path Newcomers to social enterprise and SEs have a clear and seamless pathway guiding them from “idea” stage to “execution stage”
Providing backbone support by developing a core competency list, managing SESW relationships, developing and nurturing investor relationships, social finance pipeline	SESW partners	Financial support is more readily available Increased knowledge, expertise/embedded resources on training/work of CLA, SBEG, RICs Core competencies are developed

Impact Evaluation Questions

Overarching question: What difference have the SESW hubs had on social enterprise in their region?

1. What impact has SESW had on the number of social enterprises?
2. What impact has SESW had on the level of support and capacity building for social enterprises?
3. What impact has SESW had on the effectiveness (sustainability and skills) of social enterprises?
4. What impact has SESW had in building the social enterprise ecosystem?

Outcome, Evidence Needed and Data Availability

Outcome	Evidence Needed	Data Currently Collected	Ideas, Tools, Tactics
Activity: Direct Support			
Sustainable, impactful SEs (SEs achieve financial sustainability, grow and scale – source: program outcome from grant proposal)	Operational 1 to 2 years out Hit sales and profit targets/generating revenue and meeting financial goals Track their own social and environmental metrics/know how to measure impact through metrics, success stories, et cetera Pitch competition success Press coverage	Operational 1 year out, 2 years out Annual revenue Business profile data Employment outcomes – hiring, hours, employment of owner Stories if pitch competitions, press, launches, testimonials	
SEs have the resources, skills and network they need to be sustainable and impactful/to run a successful business	Confidence in financial and business model Self-identify confidence in skills Self-identify access to resources and network	Self-identify what skills they need support in (growth wheel)/key skills/themes for coaching sessions Number of enterprises/SE coached Use of legal database Self-identify progress and knowledge gain	
Skills Development for SEs and Community			
SEs have an SE mindset/are ambassadors/champions	Owner investment Dollars of capital accessed Owners hiring Number of connections made Testimonials	Owner investment Other investment – grants, loans, prize money Money accessed in capital Number of Verge investees Number of connections made	

Outcome	Evidence Needed	Data Currently Collected	Ideas, Tools, Tactics
Workshops and events are valuable, highly anticipated and sold out	Valuable - feedback surveys, Knowledge transfer and Sustainability of knowledge transfer Highly anticipated – participants attend multiple workshops/repeat participants, inquiries, level of interest on social media Sold out – participation levels/repeat participation, participation targets met	Oral feedback Post workshop surveys – knowledge, content, quality – immediate and 1 month Workshop data – attendance, attendee demographics Year over year attendance by topic Number of workshops by topic	Valuable - Feedback Surveys, focus groups Anticipated – attendance and inquiry data
Learning and Development Business Professionals			
All business professional coaches feel equipped to support SEs	Coaches report feeling equipped Number of SE certified coaches		Surveys
All business professional coaches are able to deliver training to others/Improved coaching, networking	Increased number of SEs A coach support	Number of SE coach by type of business New SE programs Number of companies that coaches identify as SE Number of companies self-identify as SE	
Database/one-stop shop created	Measuring confidence of those who received coaching SE tools used for traditional business		Pre-Post
Networking for SEs			
SE self-sustainable through peer support and networking	Networking activities hosted and/or participated in	Number of total participants/attendees Number of events hosted, attended Number of meetings – partner, business site Number of business presentations, trade shows	

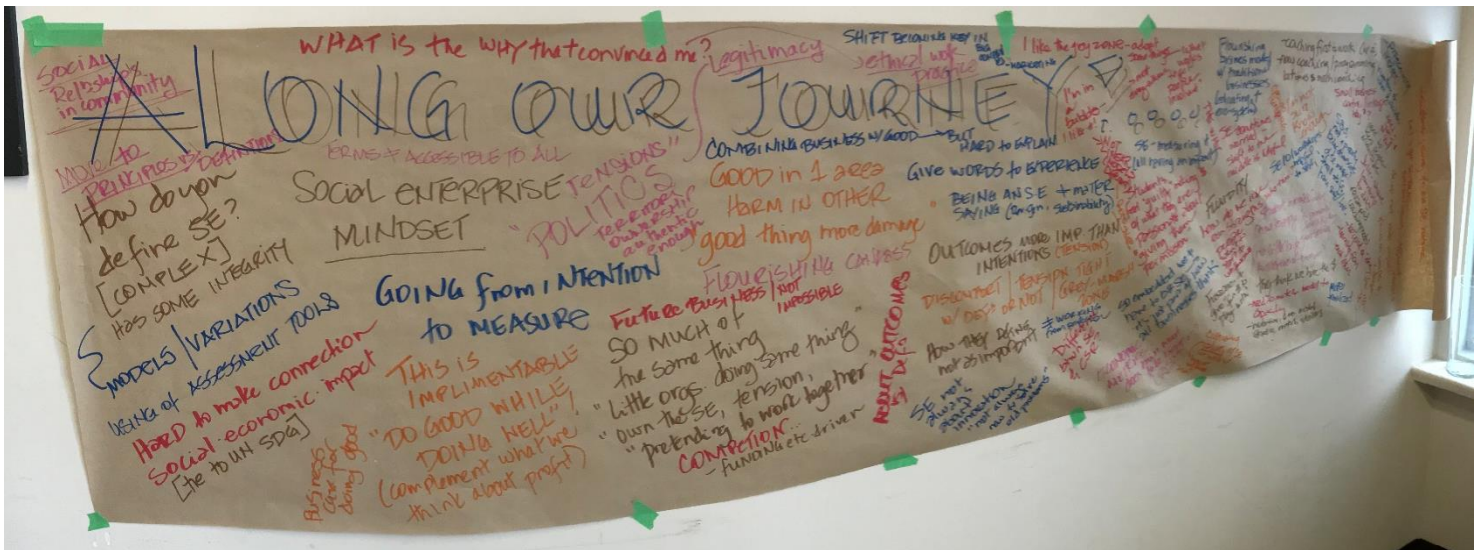
Outcome	Evidence Needed	Data Currently Collected	Ideas, Tools, Tactics
		Number of new products and services attended by SE Key topics and challenge at networking events Number of mentors; number of experts	
Monthly meet-ups for network	Number of SEs serving other SEs (cross-pollination of service and population)	Number of activities Number of connections Number of resources shared Number of participants	
Contributions to economic dynamics	Number of employments Impact investment Other business-related metrics/revenue	New hires/jobs created Number of businesses started Number of employees Number of SE receiving grants or Impact loans Business metrics	
Building Ecosystem of SE			
Seamless transition from idea to execution because we know what is offered	Being able to identify exact roadblocks and scaling		
Clear pathways for SEs to follow are revealed			
Visible examples and stories to educate & inspire	Number of stories and visible examples "self-reporting" for educate and inspire	SESW.ca website traffic stats - "stories", engagement Social media – facebook, Instagram, youtube, website, e-newsletter blog Success stories, Awards, Accomplishments	
Newcomers to SE know exactly where to go	Fewer touch points (less confusion)	How did you hear about us?	asking "where did you hear about us?"
A systems map for SE sustainable development	Level of system development		
Support Initiative			
Financial support more readily available	Increase in financing/investments	Investments/funding	

Outcome	Evidence Needed	Data Currently Collected	Ideas, Tools, Tactics
	MEDG funding SE program directly at ONE Cities funding directly Financial support for ONE partners based on qualified business advisors	New investment in SE New funding received by SESW partners	
Knowledge expertise/embedded resources on training/work of CLA, SBEG, RICs	Number of biz coaches certified on SE		
Core competencies of SEs are developed		Challenges to partnership Budget variances to partnership Delays/deficits to partnership	

Developmental Evaluation

Key Learnings

1. Individual reflection: Participants were invited to take 20 minutes to reflect on 3 questions:
 - d) What about social enterprise/enterprising have you learned since you've been involved in this project?
 - e) How have perceptions about social enterprises changed for you because of your involvement?
 - f) How has the model of supporting social enterprises shifted based on your ongoing experience from where you first started?
2. Group reflection: Learnings were discussed as a group with 2 to 3 most significant learnings recorded on butcher paper. This activity was captured by video recording



Reflective Practice

What about social enterprise/ enterprising have you learned since you've been involved in this project?

- Learned a lot about the ecosystem and what is currently happening regionally that I wasn't aware of before.
- Learning that a lot of organizations/ ecosystem players are siloed and working independently
 - Also duplicating efforts.
- Learned about the gaps in support- a lot of support in Waterloo Region for start-ups.
- Having to deal with more skepticism around the case for social enterprise
- SE has technically always been here-just the terminology is new
- Think it can be a non-profit or for-profit enterprise
- It has impressive potential to transform the business world, for a more inclusive and sustainable version of contemporary capitalism.
- Learned about many different models – non-profit, for-profit, charity, co-op etc.
- What challenges social enterprises face (financial, defining and creative revenue model that allows impact and profit)
- I need to learn more about how to support non-profits, advising, also don't feel confident with cooperatives
- Scope of work that is already being done, impact SE's can make in community and globally
- With respect to a better understand of the players and gaps
- UN. SDG's

- Social impact investments available
- Economic values
- Do more research
- There is no universal definition
- Social enterprises I impact investing on the rise
- Still not sure how to balance ethics with capitalism but have a better understanding
- Learned how to use FBMC – and that's confusing
- Learned about various SE's in Windsor/ SW Ontario
- Learned various SE business models
- Non- accessible terms
- Complicated to define or limit to an SE group; people fall on a spectrum
- Social entrepreneurs are key to building this movement in larger orgs
- A variety of coaching tools and techniques to better support
- The language isn't as important- some people don't use SE term for goal reasons
- B-corp tools
- It's not all that different from traditional business
- Social enterprise advocates are passionate
- There are many "politics" to navigate within the SE co-op, non-profit charity sectors
- You can make money and do good
- Even though you are doing good in one area, you can easily be causing harm in another if you aren't careful
- Concepts seem to be less important than principles
- Social enterprising seems to be more relational than anything else
- There are different flavours of SE across regions and across the nation.

How have the perceptions about social enterprises changes for you because of your involvement?

- Understanding the need for SE's to measure their own impact (especially negative impacts e.g. TOMS shoes)- outcomes more important than intentions
- Language scares people or pushes people away even if we could classify them as an SE
- I see the model as much more practically implementable and adaptable
- I see it as the future of business more generally
- There's many variations
 - All businesses are on a sliding scale- many grey areas. Shifting traditional businesses toward social responsibility and helping non-profits diversify their revenue streams to be more profitable/ have a larger impact
- Impressed by levels of commitment SE's and overcoming adversity to create a business model they are passionate about and they how rally support
- Doesn't always have to involve innovation
- Must be a systems issue that's addressed
- Trade learned that LOTS of people (even social innovations) don't know what an SE is
- Old business models, not all innovation
- Need to define a strong business case to build movement – traditional business (economics) metrics
- I work in a beautiful bubble of social enterprise' but we are impacted by traditional ecosystem so we need system change
- Outcomes > intentions
- The grassroots movement / group of social enterprises in our region have tainted my view of many SE's
- They seem really jaded and oppositional

- It has been a real challenge to try to integrate into the SE community locally
- I believe strongly in social Enterprise as a solution to many problems.
- I look forward to the “shift to the middle” where we can take best practices of both and make them work together
- I’m trying to spend less time discussing concepts than finding solutions to bring people together

How has the model of supporting social enterprises shifted based on your ongoing experiences from where you first started?

- Similar to #2, getting SE’s to think about how they’re going to measure/ prove impact in addition to thinking about what they’re doing
- I see it as the same business skills and competencies as traditional for-profits, but fuelled by a genuine impetus to improve the community i.e. Model of supporting SE’s should include both trade business training as well as ethical/ personal/ spiritual development
- Many of the SE clients are more ongoing than the regular SBEC clients.
- They attend more workshops networks event and pitch competitions- I wonder if this is a result of how the relationship begins (typically with a consultation and there’s a 2 plus hour FBMC session)
- It’s more of a back and forth relationship developing a business plan applying for funding etc.- because of this I’ve started using FBMC with traditional business too
- Encouraging more to use the B-corp survey to judge where they fit
- Developing a mindset of inclusion
- Recognizing the value of SE’s / contribute to the economy – social impact
- Overall rounds out the conversation with community partners/ business’s
- Students most frustrated with lack of funding
- Students generally start SE’s based on personal experience with a system issue
- Guilt around making money- more focused on social impact and personal image
- Look to traditional business supports for models, ideas, tracking “let’s get serious” movement
- Writing up on these learning’s and can share in Fall
- Big lesson is in depth not breadth of support’ managing growth of SE community in London and number of requests
- When we first started we thought we might co-coach clients (program lead and business analyst) this is not a model that worked for us.
- The program lead mandates programming and outreach and the biz analyst works with the client
- We have had trouble fitting many SE’s into our mandate, so we have started referring those who don’t fit into our mandate to their appropriate resource/ support network
- The linearity of the implantation at this partnership has shifted based on the partnership’s inputs, reaction, and contextualized needs.

Draft Developmental Evaluation Questions

What are we learning as the SESW are implementing their activities?

1. What am I learning about about social enterprises/enterprising?
2. What are the challenges and benefits of double and triple bottom lines (social, environmental, economic)?
3. How is the SESW model shifting to better meet the needs of social enterprises?
4. What is it that social enterprises in Southwestern Ontario most need to thrive?

Data Collection Methodology

- Biweekly survey emailed to primary stakeholders