

2019

SOCIAL ENTERPRISE SOUTHWEST

Evaluation Report

PREPARED BY

Centre for Organizational Effectiveness



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TABLE OF CONTENTS

Executive Summary.....	1
Context.....	5
Part I: Findings – Moving to Impact.....	17
Part II: Findings – Developmental Evaluation – Learning Along the Way	31
Part III: Conclusions and Recommendations.....	46
References.....	52
Appendix.....	54



EXECUTIVE SUMMARY

EVALUATION PURPOSE

This evaluation assesses the impact that the Social Enterprise South West (SESW) regional partnership has had for social enterprises and ONE members, and reports on what has been learned about what is needed to support social enterprise and the SESW partnership.

BACKGROUND

Since March 2017, when the Ministry of Economic Development, Job Creation and Trade funded and implemented the One Network of Entrepreneurs Social Enterprise Partnership (ONESEP) program, Pillar Non-Profit as the backbone organization, Innovate Niagara (RIC), Huron County Small Business Enterprise Centre (SBEC), University of Windsor EPICentre (CLA), and, since 2018, Waterloo Region Small Business Centre have been offering education, coaching and connections to investors with a goal of supporting the flourishing of social enterprise.

SESW aims to increase the presence of social enterprise in southwester Ontario by directly supporting social enterprises to be self-sufficient and sustainable, as well as increasing the capacity of ONE members to support social enterprise and promoting social enterprise in the broader community.

Ministry funding for the SESW partnership ended March 31, 2019 and SESW partners want to know what impact the program has had, what has been learned through the partnership and what recommendations there are for continuing the work of the partnership and for supporting the growth of social enterprise.

Pillar is also interested in recommendations on how to sustain the work of support SEs in Southwestern Ontario should Pillar continue its work as the backbone organization.

The evaluation framework and design were developed in collaboration with SESW partners through a co-design session. Using data from multiple sources, this evaluation explores SESW's impact for social enterprises, ONE members, and the social enterprise ecosystem and reports on what the partners have learned about supporting social enterprise in the course of their partnership.

A data limitation is the availability of comprehensive and reliable program data that has been consistently collected and recorded. This evaluation includes analysis of qualitative and quantitative administrative data, ONESEP progress reports submitted to the Ministry, interviews with 5 social entrepreneurs, and data provided by program partners.

OBSERVATIONS

The partnership has had a positive impact for social enterprises across the region

- At least 261 social entrepreneurs (SEs) from across the region have received entrepreneurship and business support from SESW partners
- SEs in Pillar's Incubator program and the SE interviewees report that their participation increased their knowledge about running a successful social enterprise, increased their network and increased their confidence. According to program data, 17% accessed funding for their business. Funding is a "game changer" for SEs. Some reported business success in terms of increased sales and revenues.

"[We] developed a network "that we could not have been able to develop on our own "
- SE Interviewee

Social enterprise focused learning events were well-attended and beneficial for attendees, with some indication that there is room for growth in increasing business coach capacity to support SE's.

Attendance at workshops and learning events exceeded 4,000. Participants reported on feedback forms that their knowledge increased as a result of their participation. Increased knowledge was reported by ONE members who responded to a Ministry survey; however, this same survey identified that at the program's start and one year into the program 17% felt fully equipped to assist SE clients.

"we have come a long way since that initial meeting. We have a firm understanding of financial footing"
- SE Interviewee

With leadership from Pillar, the SESW-developed Social Enterprise Coaching Program is expected to make a difference for business coaches and advisors.

Huron County and Waterloo Small Business Centres share examples where business coaches and advisors demonstrate increased capacity.

In Huron County, business coaches at 4 small business centres use the Flourishing Business Model Canvas as a mainstream business planning tool. In Waterloo, business coaches no longer identify and treat social entrepreneurs as non-profits but as social enterprises.

SESW is building up the social enterprise ecosystem through new investments and new revenue-generating SEs in the marketplace

Almost \$1.4 million in new investments from 18 different investors/investor groups were made available. New investments took the form of loans, grants, donations and in-kind contributions and came from the private, government and non-profit sectors.

the gateway was finding the workshop through a google search
- SE interviewee

At least 41 SESW-supported enterprises are known to have begun generating revenue, and 12 report having grown. These figures are likely an under-report as there is no consistent and reliable data source at this time.

SESW has the potential to have a broader community impact economically, socially and environmentally.

At least 27 SEs are believed to have had a minimum of 12 months generating revenue, an indication of potential sustainability and self-sufficiency.

GreenerBins nearly doubled in size during the course of the 4-month program
- Testimonial for EPICentre Windsor

Top UN SDG Impact Areas that SESW-supported SEs aim to contribute to are:

- Good health and well-being,
- reduced inequalities,
- decent work and economic growth
- sustainable cities and communities.

Primary stakeholders' contributions to the developmental evaluation offer helpful learnings stemming from their experience of being involved in the SESW partnership

These include:

- There is no single model or universal definition of social enterprise
- Business skills/tools are essential for social enterprises
- Financial pressures are real and financial support is essential as social enterprises are starting out
- There is tremendous hope in a social enterprise approach that has the power to transform the world for good
- There is significant work to advance the local, provincial, and national eco-system so that social enterprises have a better chance of success
- There is great potential for impact investment to grow and support social enterprises' – "you can make money and do good"
- SEs are challenged to find effective and simple ways to measure social impact
- Some tools that have been developed have proved useful. For example: B-Corp Survey, Flourishing Business Model Canvas, the Meaningful Market, pitches and the Social Enterprise Coaching Program.

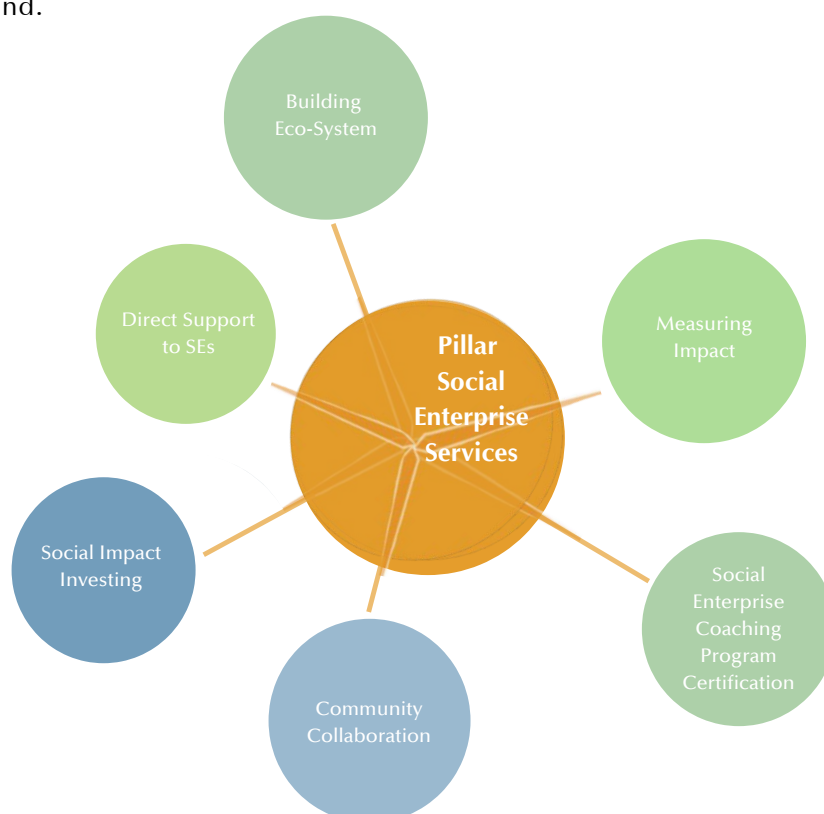
- Concentrated effort to support a few SEs seems more effective than broader support for many
- Flexible models of support are important, customized to the needs of SEs and their developmental stage
- Business mentorship appeared to work well for some SEs
- The SESW partnership approach was beneficial in building the capacity of each region's ability to serve SE even though each region's approach was unique to its region
- The collaborative was successful because it provided a structure support, resources and information sharing, flexibility and openness to change.
- The members each brought unique contributions that included characteristics such as: open, honest, respectful, considerate, reflective, supportive, leaders with diverse knowledge
- The collaborative was challenged by time & distance, only having two years to develop, uniqueness of each regionality which at times made it difficult to provide programming, buy-in & participation, and staff turnover

Our business has spread in ways that we never dreamed possible
-interviewee

Recommendations

To continue building on the efforts of the SESW partnership over the past two years and maintain momentum, it is recommended that Pillar continues to provide supports throughout Southwestern Ontario and beyond. Receiving funding to continue this work would be ideal. However, even without funding, Pillar could offer these services as a social enterprise venture. Additionally, each partner could take the findings from this program evaluation and work towards continued SE support based on the findings.

Given those findings, the following are the service categories that Pillar could offer to the Southwest region and beyond.





CONTEXT

DESCRIPTION OF THE SOCIAL ENTERPRISE SOUTHWEST PROGRAM

Social Enterprise Southwest (SESW) is a collaboration lead by Pillar Nonprofit Network (Pillar). Its goal is to increase the presence of social enterprise in Southwestern Ontario, which ultimately effects positive change on the broader communities in which they operate.

SESW promotes the flourishing of social enterprise in Southwestern Ontario by offering education, coaching and connections to investors for enterprises interested in achieving social or environmental outcomes and maximizing revenue. (SESW <https://www.sesw.ca/>).

SESW is implemented in collaboration with SESW partners: Innovate Niagara (RIC), Huron County Small Business Enterprise Centre (SBEC), University of Windsor EPICentre (CLA), and Waterloo Region Small Business Centre.

The partnership is supported with backbone support provided through Pillar. SESW was launched in March 2017 with Provincial funding through this program ending March 31, 2019.

Provincial funding for this regional consortium was provided through the Ontario Network of Entrepreneurs Social Enterprise Partnerships program as part of its Social Enterprise Strategy. Provincial funding was supplemented by funding from the London Community Foundation and Libro and is used to fund Pillar's full-time and dedicated SE coach. Waterloo's Small Business Centre provides in-kind support for a regular staff position to provide SE support as an extension of regular duties. In total XXXX were invested in this partnership over April 1, 2017 to March 31, 2019.

Pillar, lead organization, is at the centre of the partnership. Pillar is responsible for providing funding for staffing across the partnership; supporting the delivery of sub-regional workshops, information sessions and training throughout the region; increasing coaching tools; conducting storytelling workshops and content development; increasing the number of accelerators and support for entrepreneurs; and collaborating with the province.

Pillar has implemented a resource-sharing model to deliver the program. Funding flows through Pillar to each of its SESW partners. Each SESW partner has developed its own unique service delivery model. Pillar develops resources and tools that are shared among the partners and hosts weekly meetings to collaboratively build the capacity across the partnership.

SESW partners joined the SESW partnership at different times:

Pillar and Niagara became SESW partners when the program started in March 2017
 EPICentre, University of Windsor, became a SESW partner in April 2017
 Huron Small Business Employment Centre joined the SESW partnership in September 2017

SESW'S ACTIVITIES

Professional Development: Workshops aim to increase knowledge and awareness about social enterprise and build skills to support a revenue-generating and sustainable social enterprise. Workshops target a range of audiences including entrepreneurs, Ontario Network of Entrepreneurs (ONE) Member business coaches and advisors, social entrepreneurs, potential investors as well as anyone interested in social enterprise.

Coaching - Direct Support to Social Enterprises: SESW staff at each site meet with entrepreneurs for an initial discovery meeting and provide a range of one-on-one business support through a social enterprise lens. Business support includes market analysis, feasibility studies, financial coaching, pitch coaching, business planning, strategic planning and promotions. SESW partners help social enterprises access funding in a variety of ways including support in finding funding opportunities, completing funding applications, and providing pitch coaching. They facilitate connections to mentors and others.

Building the Social Enterprise Ecosystem: SESW partners provide community outreach and education regarding social enterprise, help SEs tell their story, share SE stories through multiple media including online and more traditional ways. Events that engage the general community and feature social enterprises are held across the collaborative.

SITE LEVEL SERVICE DESIGN AND DELIVERY

Each SESW partner has its own locally developed model for assessing and building capacity across business support programs and providing specialized supports to SE and entrepreneurs:



Huron County Small Business embeds social enterprise into mainstream small business programs and services, workshops and resources reaching entrepreneurs and business coaches. Huron provides a range of direct support services to social entrepreneurs/enterprises



Waterloo Region Small Business Centre identifies Social Enterprise as one of the programs offered. Their Social Enterprise Program includes 3 components: Social Enterprise Workshop Series for anyone who is interested in learning more, Storytelling Workshops for Entrepreneurs and Accelerator and Pitch Competitions for social entrepreneurs/enterprises



Innovate Niagara, as the first point of contact for entrepreneurs, matches social enterprises with services that meet their needs including in-house programs, resource partners and network of incubation facilities. Innovate Niagara also hosts Social Enterprise workshops for entrepreneurs and business coaches, and Pitch Competitions for social entrepreneurs/enterprises



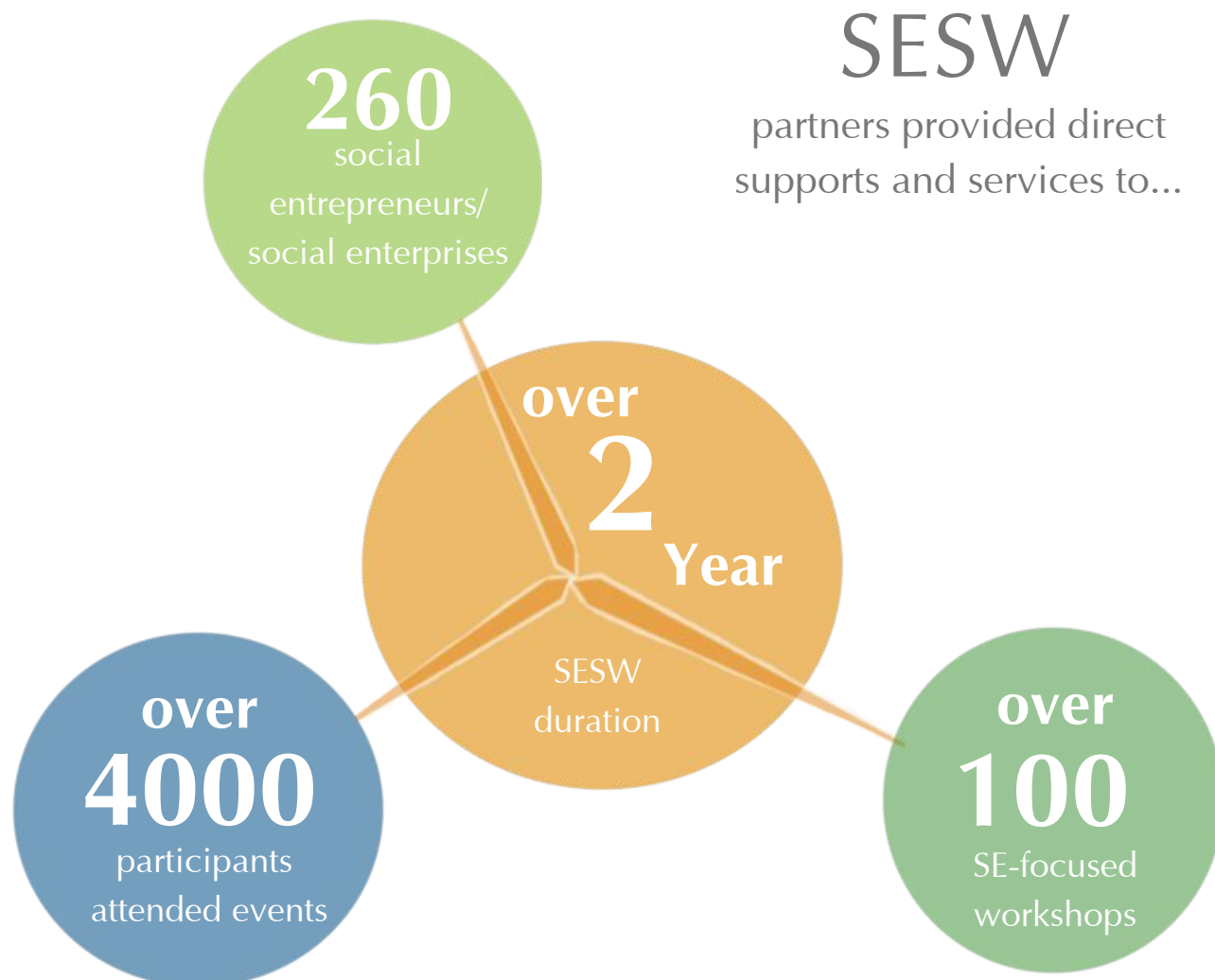
University of Windsor's EPI Centre is a community hub for social enterprise information providing education and information about social enterprise through their event series in addition to two social innovation programs: the Libro EPIC Social Impact Initiative and EPIC-O'Neil Community Impact Program, a 6-month pilot program which links students of the Odette School of Business with local charities to help charities with capacity building



Pillar Nonprofit Network, with a full-time dedicated social enterprise business coach, offers resources, workshops, consulting and financing to support the start-up and growth of social enterprises. Through the SESW program, Pillar also supports Libro's Social Enterprise Incubator program

As the Site Level Resource and Implementation tables in Appendix 1 illustrate, each site is unique in its organizational structure, service delivery model and primary target client group. These tables provide additional details on staffing, funding, primary client group served, and services provided by each partner.

PROGRAM RESULTS



SESW has added a number of coaching tools for business advisors to use including the Flourishing Business Model Canvas, Basecamp and Social Impact Canvas. Through Pillar, SESW has developed, piloted and launched the Social Enterprise Coaching Program (SECP), which provides social enterprise training for business advisors, account managers, non-profit and philanthropic organization officers. The SECP was delivered to business coaches in Niagara Region. Early response about the value of this coaching certification program is promising with three additional program sessions delivered in areas outside of the southwest region, generating revenue that can be reinvested into the region's social enterprise program.

SESW partnership has developed and implemented resources and tools for social enterprises as well including a Nonprofit Readiness Assessment Tool, list of capital available for social enterprises in Ontario, and topic-specific informational material in different formats.

Twenty-six social enterprises created a digital asset that they can use to promote their business and which can be used to promote the value proposition of impactful organizations.



EVALUATION PURPOSE & FRAMEWORKS

This evaluation was completed for the following purposes:

- To assess the impact that SESW had on the presence of SE in the respective communities
- To identify key learnings from the SESW with regards to what is needed to support the success of the SESW partnership and SEs in the Region

The objectives of the evaluation are to:

- Support accountability of impact measurement for external reporting to funder
- Implement developmental evaluation for organization and program improvement and learning
- Ensure knowledge generating that enhances evaluation culture among Pillar's team and program stakeholders

The evaluation results will be used:

- To augment the final report to the Ministry of Economic Development, Job Creation and Trade
- By Pillar and SESW partners to embed evaluation into their Social Enterprise work
- To inform Pillar's social enterprise and social finance initiatives, such as VERGE Capital, and Pillar's overall organizational mission (i.e. to support program sustainability)

The evaluation will be shared with funders, partners, clients and stakeholders.

Value of this Report

As the ecosystem of social enterprise continues to be grown across Canada, this evaluation tells the story of what SESW achieved over a two-year period:

- By describing program reach, supports and services from SESW partners, what services and supports accessed by social enterprises/entrepreneurs, the value of the services and support they received, and the broader community-level impact they hope to have
- By contributing knowledge about the impact that professional development had on the capacity of ONE members to support social enterprises and entrepreneurs to flourish
- By providing early indicators of SESW's contributions to the social enterprise ecosystem
- By summarizing lessons learned through the developmental evaluation
- By making recommendations based on the evaluation regarding effective strategies to continue to support social enterprises and the social enterprise ecosystem

Evaluation Framework and Design

Given the innovative approach to the SESW partnership, the evaluation includes a developmental and an impact evaluation.

Key evaluation questions were co-developed with the primary stakeholders at the evaluation planning session held August 1, 2018 and shared for comment. Through this process, the final key evaluation questions were confirmed. Further to the confirmation of key evaluation questions, relevant indicators, data sources and potential data collection strategies were identified. Further refinement of the evaluation questions occurred throughout evaluation implementation

Impact Evaluation	Developmental Evaluation
1. What impact has SESW had on the effectiveness of social enterprise?	1. What has been learned about social enterprises/enterprising?
2. What impact has SESW had on the capacity of business support programs/ONE members to support social enterprise?	2. What are the challenges and benefits of double and triple bottom lines (social, environmental, economic)?
3. What impact has SESW had on the presence of social enterprise in the SESW region?	3. How did the SESW model shift to better meet the needs of social enterprises?
4. How is SESW contributing to the UN sustainability goals at the local level?	4. What is it that social enterprises in Southwestern Ontario most need to thrive?

Table 1: Key Evaluation Questions Co-Designed with Partners

Two general frameworks were incorporated to address the stated evaluation objectives of supporting accountability of impact measurement and implementing developmental evaluation for ongoing learning.

Theory of Change

A Theory of Change approach was the selected framework for impact measurement. As justified in the literature, theory of change or logic modelling is among the leading measurement approaches used to measure the impact of social enterprises (Lalande). Jackson proposes that, for evaluating impact investment, “theory of change is a generally cost-effective way to frame and inform an evaluation” (100). Finally, the Social Enterprise Impact Measurement Task Force recommends the articulation of a theory of change as an important step towards impact measurement.

Since this was the beginning of working intentionally at supporting social enterprises across Southwestern Ontario, and the fact that it takes time to set up an initial infrastructure as well as the limitation with data consistency and availability, this evaluation focuses on the results of SESW’s activities and on key learnings generated during implementation. Many of the social enterprises/social entrepreneurs that the SESW partners supported were in ideation or testing and the two-year time frame is not long enough to assess long term/ultimate outcomes. For many, it may also be too early to evaluate on intermediate outcomes.

Developmental Evaluation

A development evaluation approach was used given that the SESW partnership model of providing support to social enterprises is new and innovative. It supports the theory of change, as it captures learning throughout the process. Developmental Evaluation is often used during the early stages of an innovative approach. It is meant to provide opportunity for primary stakeholders to reflect and share insights so that the model can shift along the way and learnings about social enterprising would not be lost. Developmental evaluation is best used, among other things:

- To support development of innovations and adaptations in dynamic environments
- In complex, dynamic environments
- When there are no known solutions to priority problems
- When there is no certain way forward and multiple pathways are possible
- When there is a possible need for innovation, exploration, and social experimentation
- When exploring possibilities
- When generating ideas and trying them out

As described by Michael Quinn Patton:

Developmental evaluation...centres on situational sensitivity, responsiveness, and adaptation, and is an approach to evaluation especially appropriate for situations of high uncertainty where what may and does emerge is relatively unpredictable and uncontrollable. Developmental evaluation tracks and attempts to make sense of what emerges under conditions of complexity, documenting and interpreting the dynamics, interactions and interdependencies that occur as innovation unfold. (7)

SESW's Program Theory

A theory of change was developed with SESW partners during an evaluation planning session in August 2018. The development of the theory of change was guided by the following questions: what are we doing? for whom? and why does it matter? From these, indicators that provide evidence of progress towards and achievement of intended outcomes were mapped. The table is a summary of the key elements identified:

WE ARE...	FOR...	SO THAT...
Providing direct support in the form of coaching, access to capital, access to resources, mentoring, making connections	Individual Entrepreneurs	SEs gain the skills, resources and network needed to be sustainable and impactful
Delivering skill building training, workshops and events that are highly attended and reported as being valuable	Entrepreneurs including social entrepreneurs and community	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	ONE Member Business Coaches and Advisors	<ul style="list-style-type: none"> 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
Building the social enterprise ecosystem by 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 	SE stakeholders, broader community, Potential partners Traditional entrepreneurs	The social enterprise ecosystem is built up and SE presence in the community is increased
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 There is increased knowledge, expertise/embedded resources on training/work of CLA, SBEG, RICs Core competencies are developed

Key Indicators

Working from this theory of change, output and outcome indicators were developed in collaboration with SESW partners:

Impact Area	Indicators
Social Entrepreneurs/Enterprises	<ul style="list-style-type: none"> • Program Reach - Participation • Services and Supports Accessed • Access to Funding • Value of the Supports and Services for Social Enterprise/Entrepreneurs • Suggestions for Improvement
Business Coaches/Advisors	<ul style="list-style-type: none"> • Engagement and participation of business coaches and advisors • Increased knowledge and capacity of business advisors/coaches to support SE • Knowledge application • Business coach and SE feedback and advice
Social Enterprise Ecosystem	<ul style="list-style-type: none"> • New investments • Social enterprise/entrepreneur presence in the marketplace • Value of the partnership from the perspective of SESW partners
Community Level	<ul style="list-style-type: none"> • Sustainability: Generative Revenue - # of SEs generating revenue for a minimum of 12 months • Social Impact: United Nations Social Development Goals alignment

Evaluation Data Sources

For consistency with previous reporting and for replication purposes, where possible, findings are compiled from the Interim and Annual ONE SEP Reports. This data is supplemented by:

- Additional program data provided by SESW partners
- Reports produced for Pillar including: Impact Evaluation of Pillar's Incubator Program, 2017 Workshop Feedback, Southwestern Ontario's Social Enterprise Market Report 2018
- Interviews with 5 social entrepreneurs
- Ongoing reflection and journaling from primary stakeholders regarding the developmental evaluation questions

Evaluation Challenges

Data availability is the primary challenge for this evaluation. While primary data collection was important to gather evidence of change and the contribution that SESW partners had on the change experienced, SESW partners note that social enterprises/entrepreneurs and ONE Members are "surveyed out". For this reason, efforts to collect primary data through an online survey were unsuccessful. With the support of SESW partners, the evaluation team attempted to engage social entrepreneurs and business coaches for interviews to supplement the survey data collection. While these provided solid case studies only five interviews with social entrepreneurs were conducted.

ABOUT THIS REPORT

This report is divided into three main sections – a presentation of Findings (Part I and Part II) and Conclusions and recommendations. Results of the interviews with social entrepreneurs are woven into the report.

Part I: Findings – Moving to Impact

- Impact of the SESW for Social Enterprises/Entrepreneurs
- Impact of the SESW for ONE Member Business Coaches/Business Advisors
- Impact of the SESW on Social Enterprise Ecosystem
- Community Impact

Part II: Findings – Developmental Evaluation - Learning Along the Way

- Learnings about social enterprises/enterprising
- Perceptions About Social Enterprises
- Shifts in the SESW model to better meet the needs of social enterprises
- Challenges and benefits of double and triple bottom lines (social, environmental, economic)
- Supports that SEs in Southwestern Ontario most need to thrive
- Learning about the SESW Partnership

Part III: Conclusions and Recommendations

FEATURED SOCIAL ENTERPRISES

Featured throughout the report are results of our interviews with 5 social enterprises. The entrepreneurs behind these enterprises were interviewed for this evaluation to gain a deeper understanding of the impact of the SESW for social enterprises. The following brief descriptions of the enterprises provide some background on who they are and how they came to be:

EcoMarket

The EcoMarket is an environmental organization with a goal of supporting, uplifting, and community action through networking, pitch competitions, and an annual conference in order to build awareness about green businesses and to generate funding for these enterprises.

The EcoMarket grew out of the originator's own challenges in finding funding to start the entrepreneur's green business, EcoWell. It seemed that all the business support funding and services were aimed at tech businesses.



Home Grown Food Basket

Homegrown believes in helping local farmers access the market and creating easier access to local food. Through Homegrown Food Basket, an online Farmers' Market, micro-finance agricultural initiatives, and consultations, Homegrown empowers farmers locally and internationally.

With a business coaching relationship previously established, the Small Business Centre identified that the newly conceived idea of the Homegrown Food Basket needed social enterprise – tailored business coaching and advice.



Open Arms Mission

Open Arms Mission is a non-profit Christian organization assists people living in economic, social and spiritual poverty. The organization operates a thrift store and warehouse for the purposes of generating revenue for Open Arms Mission and for providing job training in basic job skills and retail skills, through a partnership with Job Gym and Employment Solutions.

While the thrift store and warehouse had been in operation for about 10 years, staff had not considered it a social enterprise. It was through an informal conversation who knew about social enterprise and where to SEs could access support that Open Arms saw possibility and contacted the SESW partner for help.



Southridge Jam Company

Southridge Jam Company is a social enterprise initiative within a non-profit that provides shelter for people experiencing homelessness. It is "on a mission to end the cycle of homelessness in Niagara by providing individuals who have experienced homelessness the opportunity to develop job training and life skills". Through job training skills, Southridge Jam Company is providing a "next step" opportunity for people transitioning from homelessness. It is in its fourth season.



The two originators of the idea for the enterprise were business owners as well as being involved in the Southridge Shelter. They began the enterprise with the mindset of selling jam for the purposes of creating a blended return on investment. They had identified the need to help people transition successfully from homelessness.

The business was originally made possible through partnerships with local farms willing to donate/provide fruit at a discounted price, a business plan and a grant from the Ontario Trillium Foundation. Finding and participating in a social-enterprise-focused workshop was the gateway for them to engage with a SESW partner for more intensive with SE coaching.

Windmill Lake

Windmill Lake is an eco-park offering environmentally sustainable outdoor activities. The company started in 2014 as a for-profit business. Windmill Lake connected with the Small Business Centre in 2018. The company needed help growing their business in an intentional way and they wanted to make the business more inclusive by offering accessible water activities. Windmill Lake connected with the Small Business Centre in 2018. The company needed help growing their business in an intentional way and they wanted to make the business more inclusive by offering accessible water activities.

A recommendation from a friend who had been a client of the Small Business Centre led Windmill Lake to reach out for help growing the business more intentionally. At the time, they were unaware that their business fit the definition of a social enterprise.





PART I: FINDINGS – MOVING TO IMPACT

Impact means different things to different people and in different contexts.

Impact: “the social, environmental or economic effect or change (either positive or negative - inclusive of outputs and outcomes), that occurs to people and communities as the result of an activity, project or policy undertaken” (European Union and Organisation for Economic Co-operation and Development - OECD).

For the purposes of this report, impact is defined as “the social, environmental or economic effect or change (either positive or negative - inclusive of outputs and outcomes), that occurs to people and communities as the result of an activity, project or policy undertaken” (European Union and Organisation for Economic Co-operation and Development - OECD). Specific to the SESW Partnership, this evaluation explores the effects and changes that occurred as a result of SESW’s activities to:

- Social enterprises and entrepreneurs
- ONE Member business coaches and business advisors
- The social enterprise ecosystem
- The broader community

This evaluation holds that in order for impact to occur, people need to participate in SESW’s activities, participation needs to have value from the perspective of the participants, and participation needs to result in tangible and observable growth of the business. This simple model provides a simple guide for the presentation of relevant and available data.

IMPACT OF SESW ON SOCIAL ENTERPRISES/ SOCIAL ENTREPRENEURS

Services Provided to Social Enterprises by SESW Partners A brief description of the services provided by SESW partners to social entrepreneurs/enterprises helps to contextualize the experience of social enterprises/entrepreneurs with SESW partners individually and SESW as a whole.

Each SESW partner:

- Conducts Discovery meetings which are standardized initial meetings to determine the revenue and impact models of social entrepreneurs
- Host workshops for social entrepreneurs

Beyond these standard offerings, the types of services and supports provided by regional partners to social enterprises/entrepreneurs vary according to the regional partner's role and mandate (Figure 1):

Figure: Services Provided Directly to SEs

Huron Small Business Employment Centre (SBEC)	Provides comprehensive and direct one-on-one support including business planning and development, ongoing coaching, promotions and networking opportunities
EPICentre, University of Windsor	Provides student entrepreneurs with a host desk, connects them to in-house volunteer mentors who are entrepreneurs, refer to the Regional Innovation Centre or Small Business Centre when ready
Innovate Niagara	Provides access to resources and mentoring as well as business development support such as business planning, feasibility studies, and market research. Business analysts act as mentors
Waterloo SBC	Provides direct support to entrepreneurs and connects social entrepreneurs to experts
Pillar	With a dedicated SE business coach provides comprehensive coaching services and supports Pillar's Incubator Program

Indicators of Change at the Social Enterprise Level:

- Program Reach - Participation
- Services and Supports Accessed
- Access to Funding
- Value of the Supports and Services for Social Enterprise/Entrepreneurs
- Suggestions for Improvement

Analysis

Program Reach – Participation

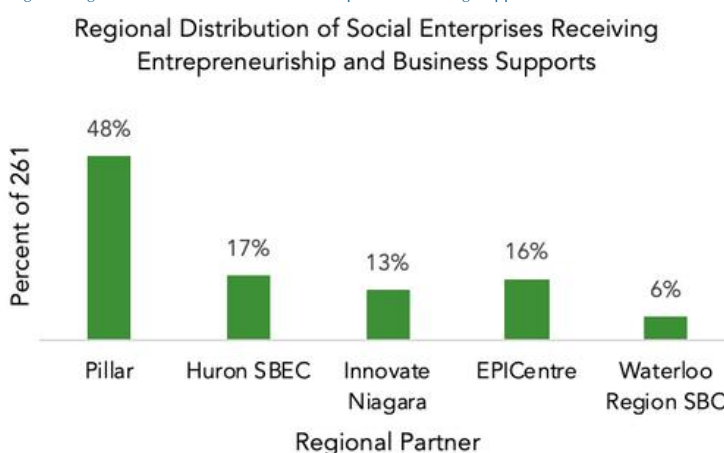
Data collated from the Interim and Annual funder reports identified that SESW partners provided entrepreneurship and business supports to at least 26^[1] unique social enterprise businesses:

- Of these, 220 accessed multiple services, participating in workshops, pitch competitions and/or receiving business planning and coaching services.
- 41 engaged with a partner for a Discovery meeting only and did not access any other service.

The distribution of businesses served reflects the unique models and landscapes of each regional partner:

- As compared to other partners in the region which have social enterprise focused staffing for 0.5 full time equivalent (FTE's), Pillar, with a full-time and dedicated Social Enterprise business coach, accounts for almost half of all social enterprises reached
- Waterloo Region joined the partnership in 2018, one year after the other partners, and social enterprises/entrepreneurs are just becoming aware of this new resource.

Figure: Regional Distribution of Social Enterprises Receiving Support



Source: Inventory of Social Enterprises Served Compiled from ONESEP Interim and Annual Reports

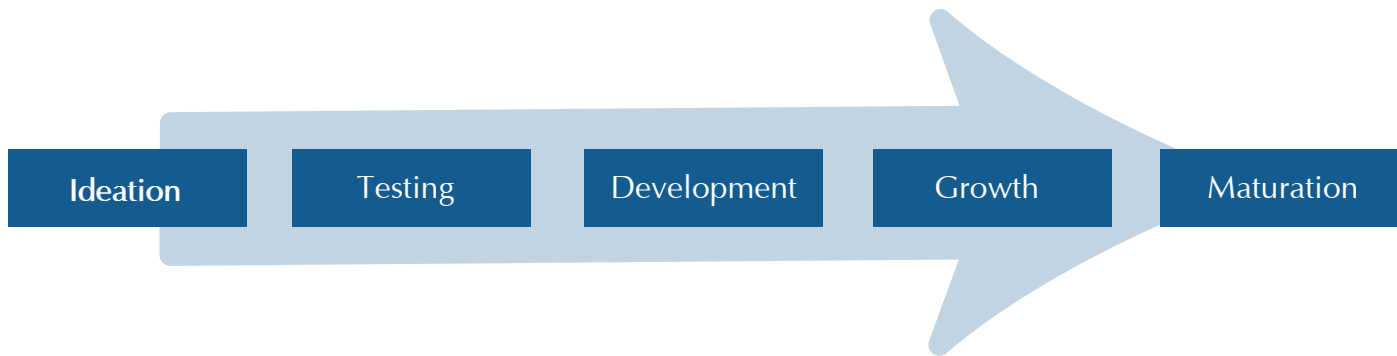
Profile of Social Enterprises Served

A 2018 market report of 154 SEs served by Pillar, identified that the predominant business models were retailing, real estate and asset rentals, and arts, entertainment and recreation.

Social entrepreneurs come to SESW partners at different stages of development. Some connect early, when they have an idea for a social enterprise and need help moving from the “ideation” stage. Some come are at point where they have been in operation either as an SE, a non-profit or even a for-profit organization and want help to grow. The social enterprise may be an arm of a larger organization as seen with Southridge Jam Company or it may be a full social enterprise such as Windmill Lake. The SE journey is typically described in five stages, with the Development stage being the point where a social enterprise becomes revenue-generating. (Figure 3)

[1] Cautionary Note: For consistency and replication purposes, data on the number of SEs receiving supports and services is compiled from the listing of businesses documented in the ONESEP Interim and Annual Reports.

Figure: Social Enterprise Journey Stages



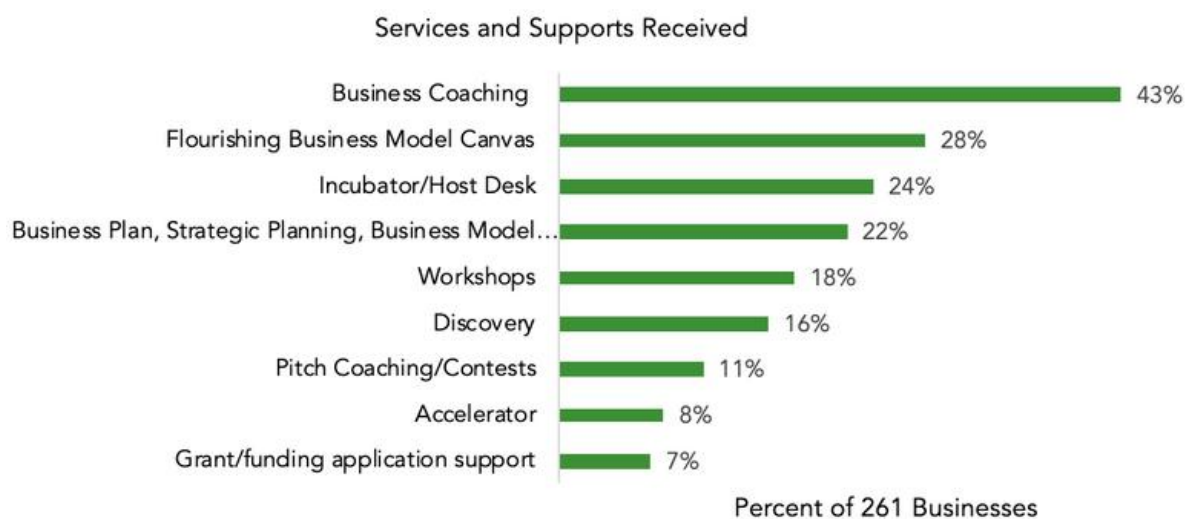
Data to inform a baseline profile of the stage of development of the 261 SEs served is not available at this time.

Services Received

Narrative descriptions of the supports and services received are provided in the Interim and Annual Funder reports. These descriptions were coded, with main categories emerging from the descriptions provided. These categories are shown in the figure “Supports and Services Received”. Most businesses participated in or received multiple services and supports:

- Almost half of social enterprises received ongoing business coaching, business development and promotion support
- Just over one quarter (72) completed a Flourishing Business Model Canvas (FBMC). A FBMC helps entrepreneurs build business models with social and environmental impact
- Almost one quarter (62) participated in Pillar’s Incubator Program (45) or EPICentre’s Incubator or Host Desk program (17)

Figure: Services and Supports Provided to Social Enterprises



Source: Data compiled from ONE SEP Reports

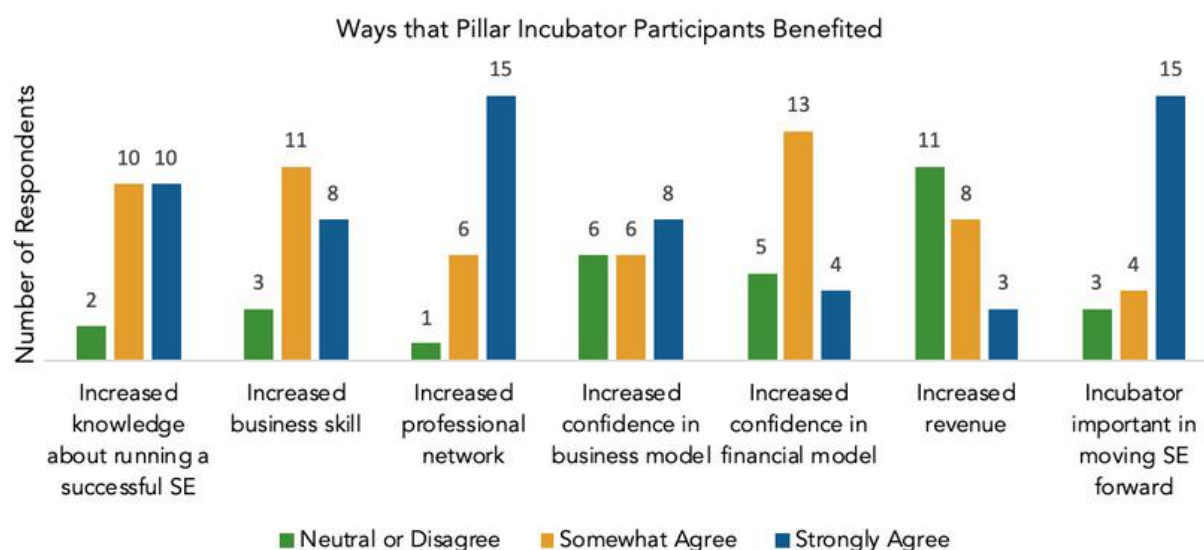
Program data provided by SESW partners identified that over 100 SE-focused workshops were held for enterprises and entrepreneurs and that attendance at these workshops exceeded 4,000.

Social entrepreneurs in Pillar's Incubator program reported on the ways that the services and resources benefited them. Respondents generally expressed that the Incubator helped in moving their SE forward. From the responses, it would appear that:

make you feel that they have your business's best interests at heart - interviewee

- The program was most beneficial at increasing the professional network and increasing knowledge about running a successful social enterprise
- The program was less beneficial, comparatively, and at helping SEs to increase their confidence in their financial or increase their revenue or sales

Figure: Ways Social Entrepreneurs in the Incubator Program at Pillar Benefited from the Services and Resources Accessed



Source: Survey data gathered for the Pillar Incubator Impact Assessment Report

From the interviews conducted, we learned more about what social enterprises found to be most helpful:

- **Access to funding:** pitch competition; “financial support is a game-changer”
- **Relationships:** business coaches as facilitators; support, encouragement and ongoing mentorship – “feel like we aren’t alone”, “they went above and beyond”; “being able to talk things through”; personal connections with staff
- **Flourishing Business Model Canvas:** “eye opening”, “helps you think outside of the box and see all the impacts”
- **Knowledgeable and informed support:** Receiving educated, objective guidance; practical suggestions for improvement based on market research; business planning support
- **Practical support:** Help navigating the bureaucratic and business requirements; accounting and small business finance
- **Promotions:** connections, networking opportunities and promotional support; promoting events
- **Workshops:** storytelling; business skills; receiving follow up materials after the workshop; accessible, affordable and reasonable from a time perspective

Access to Funding

Lack of access to funding through grants and loans for capital is known to be a barrier for the development of social enterprises (Lalande).

- 7 out of 22 social entrepreneurs somewhat or strongly agreed that because of their participation in the Incubator program at Pillar, they gained access to needed resources

feel like we aren't alone

- According to program data from 4 SESW partners, 45 social enterprises accessed funding through SESW to help develop their business
- Funding was through Starter Plus Grants, VERGE, pitch competitions, Pillar Nonprofit, and grant offering organizations
- Funding was in the form of grants and loans

Value of the Supports and Services for Social Enterprises/Entrepreneurs

- 22 out of 34 Pillar Incubator survey respondents somewhat agree or strongly agreed that their knowledge and skills increased and that their confidence in their financial and business model increased
- Huron SBEC reports that 8 non-profit organizations and 1 for-profit social enterprise now have sustainable plans which they did not have before
- The feedback from the interviewees highlights the changes they experienced as a result of the SE-focused business support they received from SESW's partners. From these, we see that these social entrepreneurs gained confidence, were encouraged, learned practical skills, developed their networks and seem to be on the road to sustainability:

financial support is a game-changer

From the perspective of Social Entrepreneurs, the value of the supports and services include: the practical and tangible business support provided by knowledgeable coaches, learning to start with "why", and encouragement.

the gateway was finding the workshop through a google search - interviewee



Table : Benefits of Support Received from the Perspectives of Social Entrepreneurs

Most Important Thing Learned		Value of the Support Received
Windmill Lake	"how to focus on tangible short-term and long-term objectives after exploring the diversity of directions we could go"	Felt empowered Strengthened leadership capacity Able to offer inclusive program as a result of successfully gaining new funding Positively impacted sustainability
Homegrown	Importance of sharing our story – not just products but our "why", our beliefs Value of working collaboratively rather than competitively	Increased confidence in business plan Developed business partnerships Developed a network "that we could not have been able to develop on our own" Business growth
Open Arms	Importance of being able to articulate your "why" and tell your story	Shifted thinking from seeing the business as a charity to talking about it as a business that has impact
Southridge Jam	Practical business skills and financial aspects	Increased confidence Successful recipient of Niagara Prosperity Initiative Grant
EcoMarket	Build a business and business plan starting from "why" rather than the traditional approach of "what is the opportunity and how do I exploit it"	Encouragement Successfully launched

Source: Interviews Conducted January 2019

Suggestions from the Pillar Incubator Program

Survey respondents offered the following suggestions for improvement with respect to the services they need:

- More structure (6): Goal setting, check ins, milestones, 1 on 1's (6)
- More access to business mentor (5): Business development, seasoned, professional, social finance coach
- Funding and finances (5) - Help with grant writing, grant writing workshops, follow on funding,
- More pitch competitions, Not enough opportunity to provide services/skills for a fee at Innovation Works
- Operational related (3): Help with getting volunteers (2), graphic design
- More networking with businesses

“Before connecting, we felt alone and there were moments of saying “maybe we should just stop”. Now we can turn to them. This is a game changer going forward. - interviewee”

IMPACT OF SESW ON THE CAPACITY OF BUSINESS COACHES AND ADVISORS TO SUPPORT SOCIAL ENTERPRISES

Strategies for Engaging Business Coaches/Advisors

All SESW partners offer workshops and learning events that can be attended by business coaches/advisors. Three of the five partners provide workshops and learning events that target business coaches/advisors specifically. EPICentre Windsor does not target business coaches/advisors specifically, though they do let them know about learning events.

Waterloo's workshops and learning events targeted both entrepreneurs and coaches, so a mix attended all workshops. In addition to holding workshops and learning events, Pillar hosts an online Basecamp group with resources and supports the development of learning materials for business coaches and advisors.

Indicators of Change at the Business Coach/Advisor Level:

- Engagement and participation of business coaches and advisors
- Increased knowledge and capacity of business advisors/coaches to support SE
- Knowledge application
- Business coach and SE feedback and advice

Our business has spread in ways that we never dreamed possible - interviewee

Analysis Participation

Data on the engagement of business advisors and coaches in professional development activities aimed at increasing their capacity to support social enterprises/entrepreneurs was provided by each SESW partner.

Table: Business Coach/Advisor Engagement in SE-Focused Professional Development and Learning Events

Partner	# of business coaches directly served	# of SE focused professional development workshops/events	Attendance at events and workshops
Huron SBEC	16 through SE 101 Workshops Also met with each SBC in the region, with 4 SBCs receiving SE training	18 Plus, presentation at regional conference	492
Innovate Niagara	12	10	318
EPICentre	Not applicable	None held specifically for business coaches/advisors	Not tracked – some may attend workshops held for SEs and general events held such as lunch and learns
Pillar	41 including 6 SESW partner staff and 35 coaches/advisors through the SESW-developed Social Enterprise Coaching Program	(2017) 15 events (2018) 1 SECP training (2019) 3 SECP trainings – all held outside of southwest region	239 (2017) 35 (2018 and 2019) through the SECP training
Waterloo	7	10 (inclusive of entrepreneurs and coaches/advisors)	355 (inclusive of entrepreneurs and coaches/advisors)

Source: Program data provided by SESW Partners

Increase Knowledge and Capacity of Business Advisors/Coaches to Support SE

People attending the social enterprise business coaching workshops in 2017 completed evaluation surveys at the end of each workshop. These evaluation surveys included questions that asked about knowledge change and intention to use the knowledge learned in their workplace.

- Overall, results from 161 surveys completed for 9 workshops indicate that the workshops were effective at increasing knowledge and intention to apply learning
- The proportion of people self-rating as having a high level of knowledge increased from 20% before they participated to 68% after they participated. The before and after questions were asked on the same post-workshop survey instrument
- 73% said they were likely or very likely to apply the knowledge they learned

To measure the impact and progress of ONE Social Enterprise Partnerships, the Ministry of Economic Development, Job Creation and Trade conducted two annual surveys of ONE members^[2]. These surveys assessed ONE member capacity to provide supports to social enterprises as well as identify challenges at baseline and one year after program implementation.

*Huron County as prime example of integrating SE into a program
- SESW Partner comment*

Evidence of Knowledge Application – Evidence of Capacity Change in Business Coaches

The theory of change model posits that as a result of knowledge and awareness gained through the professional and learning events they participate in, ONE Member Business Coaches and Advisors will feel better equipped to support SEs and will be able to deliver training to others, which includes other business coaches and social entrepreneurs.

- Huron SBEC reports that business coaches and advisors are doing Flourishing Business Model Canvass sessions with their clients as a new practice.
- Waterloo reports that as a result of their partnership with SESW, business coaches in the Small Business Centre are able to identify entrepreneurs who come in with an idea that could be a social enterprise and are able to direct them to SE101 workshops, the Flourishing Business Model Canvas and towards the SE program assistant to learn more about social enterprise. Before their involvement in the partnership, this would not have occurred. Prior to the partnership, potential social entrepreneurs would have been identified and classified as a non-profit/charity and sent to services that help these types of organizations.
- With the implementation of Pillar's newly developed Social Enterprise Coaching Program in November 2018, more data on the impact of SESW on the capacity of business coaches to support SEs will become available if tracked systematically.

The EcoMarket was successful because the business started with the “why” and “where it will be in 5 years” – it would not have been as successful if it had been built in any different way - interviewee

[2] Technical Note: 23 ONE members from the Southwest Region responded to the Year 1 Survey. The Ministry cautions that the 2017-2018 Annual Survey Results for the Southwestern Region are best used as a tool to assess the program's strengths and weaknesses and not as evidence of success.



Figure: Social Enterprise Coaching Program

Learnings from the Perspectives of ONE Members and Social Entrepreneurs

Feedback from ONE Members in the Southwest Region

The following summary of strengths and areas for improvement draws from the southwest region results of the Year 1 ONE Member Survey conducted in 2018. This summary shows that there is evidence of knowledge gain and growth in the availability of services for SEs in the southwest region. At this point, however, there is no recorded evidence that more business coaches feel fully equipped to assist SE clients.

Table: Strengths and Areas for Improvement from the Perspective of ONE Members in the Southwest Region

Strengths	Areas for Improvement
<p>High percentage are aware of an SE supporting organization to refer clients to:</p> <ul style="list-style-type: none"> 87% are aware of at least 1 local, provincial or national organizations that support the needs of SEs to which they could refer clients, 5 points higher than the southwest region results from the baseline survey conducted and similar to Ontario <p>Relatively high and increasing interest in providing more SE support services:</p> <ul style="list-style-type: none"> 61% have a high interest in increasing SE support services, an 11-point increase from the southwest region results from the baseline survey conducted and higher than Ontario <p>Relatively more access to programs/services:</p> <ul style="list-style-type: none"> 22% offer programs/services that are available exclusively to SEs. This is an increase compared to the baseline and almost double offered in Ontario 13% offer programs for which SEs are ineligible, lower than baseline and lower than across Ontario 	<p>Low percentage feel fully equipped to assist SE clients:</p> <ul style="list-style-type: none"> 17% feel fully equipped to assist SE clients, the same as at baseline and slightly higher than Ontario

Perspectives from Social Entrepreneurs

Interviewed social entrepreneurs were asked “If you could give business coaches and advisors one piece of advice with regards to helping people who want to start or grow a SE, what would it be?” As evidenced earlier in this report, SEs shared the importance of the business coaching and support they received.

It's not sustainable to rely on volunteers - Financial support is a game changer

The feedback they provide further highlights that business coaches/advisors need to be well-informed, encouraging, challenging and supportive to best serve social enterprises.

Table: Advice for Business Coaches

SE	Suggestions
Windmill Lake	<p>Business coaches and advisors are in a “powerful position” to grow social enterprise and provide consumers with the option of being able to spend their money with companies that want to have a positive impact:</p> <ul style="list-style-type: none"> • Empower entrepreneurs who are trying to incorporate social responsibility in their business, to know that they are social enterprises • Introduce social enterprise to entrepreneurs who have not thought of incorporating social responsibility into their business
Homegrown	<ul style="list-style-type: none"> • Relationships matter – advisors need to show real interest – “feels like our coach has taken on a love for Homegrown as much as us” • Be challenging. Push people to develop their model further. Facilitate so that entrepreneurs can identify the strengths and challenges of their idea and more fully develop it.
Open Arms Mission	<ul style="list-style-type: none"> • Start with “why” you are doing what you are doing and with identifying “what” the impact you want to have/what you expect • Provide guidance based on expertise and what has been learned about similar social enterprises
Southridge Jam Company	<ul style="list-style-type: none"> • Find ways to spread the word about the services available – “we did not know the services were available and available at no cost”
EcoMarket	<p>Need to continue to promote and build awareness:</p> <ul style="list-style-type: none"> • The idea of social enterprise is not clear to people. Just because you have a social enterprise does not mean you can't profit. • There are a lot of social entrepreneurs who don't know about the funding and business planning support that is available <p>It's not sustainable to rely on volunteers - “Financial support is a game changer”</p>

Source: Social entrepreneur interviews conducted Jan 2019

IMPACT ON THE SOCIAL ENTERPRISE ECOSYSTEM

Sector experts note the diversity and complexity of the social enterprise landscape which includes a variety of actors or stakeholders. The figure below presents an illustration of the various stakeholders that help to make up Ontario's social enterprise ecosystem.

Customers are looking for companies that are wanting to have a positive impact - business advisors are in powerful position to encourage people to consider this and guide them.

Since there are many stakeholders, evaluating the impact of SESW on the social enterprise ecosystem could be quite extensive. For the purposes of this evaluation, the focus is on three indicators.

Indicators of Change at the Eco-System Level

- New investments
- Social enterprise/entrepreneur presence in the marketplace
- Value of the partnership from the perspective of SESW partners

Figure: Social Enterprise Ecosystem



Source: Graphic excerpted from Elizabeth McIsaac and Carrie Moody. The Social Enterprise Opportunity for Ontario. Mowat NFP, 2013.

Analysis

New Investment

Data collected by SESW partners and reported in the Interim and Annual Funding reports provide evidence that SESW has been able to attract new investments to support social enterprise.

- \$1,382,368 is the total recorded amount of new investments and loans across the Southwest region
- This does not represent the total amount of investment as not all recorded new investments reported a dollar amount
- 18 different investors are identified as contributing to social enterprise growth and development in the Southwest region
- Investors include financial institutions, private individuals, foundations, corporations and government
- Investment types include in-kind investments, sponsorships, grants and loans

“ feels like our coach has taken on a love for Homegrown as much as us ”

Social Enterprise/Entrepreneur Presence in the Market Place

For the purposes of this report, social enterprise/entrepreneur presence in the marketplace includes:

- Social enterprises/entrepreneurs moving from ideation and testing to operational and revenue-generating
- Social enterprises/entrepreneurs advancing towards maturity

“ 41 social enterprises are known to have progressed from ideation and testing to becoming revenue-generating. ”

Given that the SESW partnership and its work is early in its development, and the SE that SESW partners are working with are early in their own development (e.g in ideation, testing or early developmental states), it is pre-mature to have extensive impact data at this time.

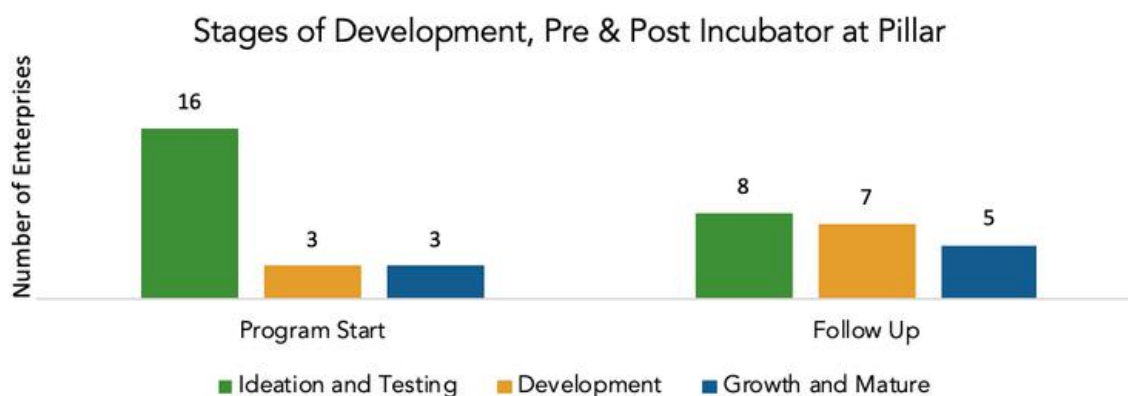
Over time, and with the SESW partners ensuring effective data collection, more information on impact at this level will be available. The information provided below is important to consider from this context.

At least 41 social enterprises progressed from the ideation and testing stages to revenue-generating. This represents almost 16% of all the social enterprises/entrepreneurs who received services and supports:

- Huron Small Business Centre and EPICentre report awareness of 35 social enterprises moving from ideation and testing to becoming revenue-generating
- 6 out of 16 social enterprises who started in Pillar's Incubator Program in the ideation or testing phase progressed to the development stage (i.e. revenue-generating) or growth stage with 5 out of the 6 doing this within 1 to 3 years of starting their enterprise
- 12 out of 22 Incubator program participants advanced their stage of development; 8 remained in the same stage and 2 were no longer operational at the time of follow up

As we continue to see an increase in local social enterprises, our goal is to arm them with the tools and resources to grow and thrive in our community (quote from Cody Joudry, Huron County Director of Economic Development excerpted from Kielburger: Social Enterprise Drives Rural Renaissance)

Figure: Stages of Social Enterprise Development, Pre and Post Pillar Incubator Program Participation



Source: Tritz, et. al

As examples of significant changes among SEs that were served through SESW, Huron SBEC and EPICentre partners shared the following:

"The Social Impact Initiative was absolutely essential to the early success of GreenerBins. The mentorship, resources, training and expertise offered by the program was nothing short of superb, and I highly recommend it to anyone wishing to create a social impact in the Windsor-Essex area. GreenerBins nearly doubled in size during the course of the 4-month program!" (EPICentre testimonial)

"One business has doubled their business and has a strong sustainable model, which they didn't before. Eight non-profit organizations have a sustainable plan moving forward, whereas they didn't before." (Huron SBEC)

Value of the Partnership

Prior to the establishment of the partnership, SESW partners had limited capacity to serve social enterprises. As a first step, the SESW partners participated in social enterprise learning and development activities hosted by Pillar.

Find ways to spread the word about the services available – we did not know the services were available and available at no cost.

According to the Draft 2018 Interim Report:

- Innovate Niagara's success with multi-stakeholder engagement in the form of community involvement in the Social Enterprise Accelerator and Pitch Competition event would not have taken place without their participation in the SESW Partnership
- EPICentre leveraged SESW funding and partnership to engage new partners and contributors including Libro Credit Union and local foundations
- Social enterprise is an institutionalized part of business support training and conversations among small business centres in Huron County

The following feedback on enhancing the work of SESW was gathered during the interviews with the SEs. Awareness building is a key theme with three of the interviewees identifying that there is a general lack of knowledge and awareness about what a social enterprise is and, if they do, many don't know about the business planning, coaching and funding supports available to for social enterprises to access at the local level.

- "Need to continue to promote and build awareness. The idea of social enterprise is not clear to people. Just because you have a social enterprise does not mean you can't profit."
- "There are a lot of social entrepreneurs who don't know about the funding and business planning support that is available"
- "Find ways to spread the word about the services available – we did not know the services were available and available at no cost"

COMMUNITY IMPACT

SESW partners identified economic and employment metrics as key metrics for assessing long term and community impact. In addition to these metrics, the United Nations Sustainable Development Goals (UN SDGs) framework can be used as a framework for measuring social impact at the community/population levels.

Indicators of Change at the Community Impact Level

- Sustainability: Generative Revenue - # of SEs generating revenue for a minimum of 12 months
- Social Impact: United Nations Social Development Goals alignment

Analysis

Sustainability: Generating Revenue

Program data provided by 3 SESW partners and supplemented by the results of the Incubator Program impact survey identifies that at least 27 social enterprises had a minimum of 12 months generating revenue. This represents about 10% of 261 social enterprises served. It is important to note the early stage of development of many of these SEs.

UN Sustainable Development Goals

As part of the evaluation process, the impact areas for the list of businesses collated from the ONE SEP Interim and Annual Reports was mapped to the UN Sustainable Development Goals based on the business descriptions provided. A total of 131 businesses were mapped to at least one impact area with 17 businesses mapped to 3 different impact areas. A similar exercise was done in July 2018 by Pillar for 154 London SEs served by Pillar inclusive of the VERGE Capital Startup Fund portfolio. A comparison of results between the analysis conducted for this report and the Market Report shows consistency.

Top Impact Areas April 2019, SESW Partnership

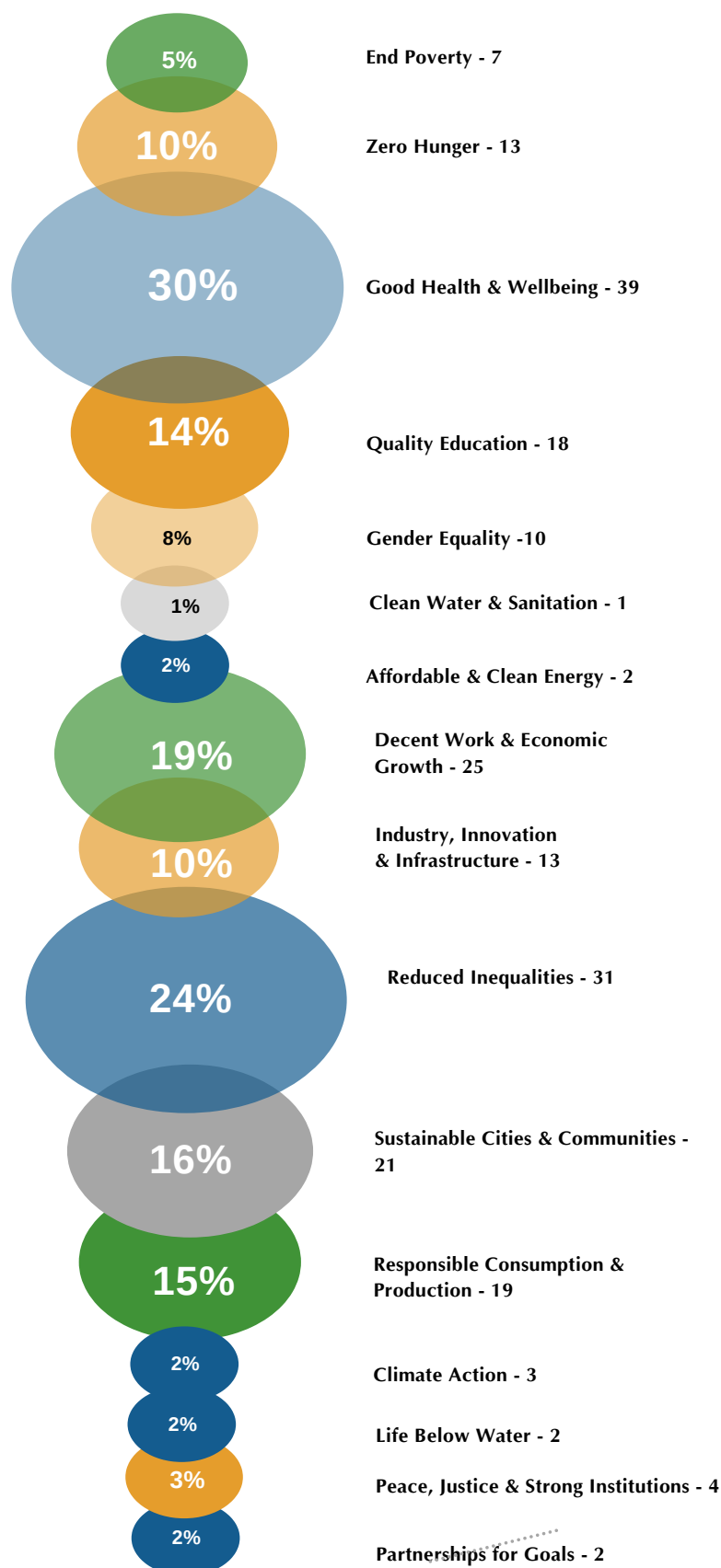
- Good health and wellbeing
- Reduced inequalities
- Decent work and economic growth
- Sustainable cities and communities

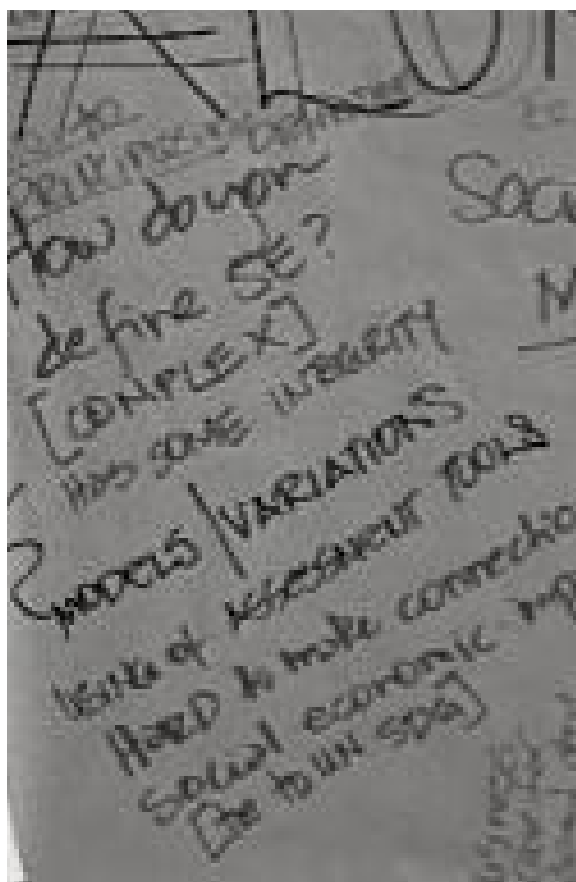
Top Impact Areas, July 2018, London SEs

- Decent work and economic growth
- Reduced inequalities
- Sustainable cities and communities
- Good health and wellbeing

Impact Areas Targeted by SEs

This figure shows the impact area as of April 2019, the number of businesses and the percentage of 131 Businesses





Co-Design – Sense-Making Session, August 1, 2

PART II: FINDINGS – DEVELOPMENTAL EVALUATION – LEARNINGS ALONG THE WAY

METHODOLOGY

Starting with a sense-making exercise on August 1, 2019, primary stakeholders from each site were invited to reflect on and share their insights on the following questions:

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

Every two weeks primary stakeholders were sent an online link and invited to share any new insights with respect to the questions. Data was collated and themed in September 2018 and in February 2019. Following is a summary of the data gathered from each question spanning August 2018 to March 2019. A final session to capture insights about the partnership was held on February 7, 2019.

LEARNINGS ABOUT SOCIAL ENTERPRISES/ENTERPRISING

1. Primary stakeholders were asked to reflect on their learning regarding social enterprises/enterprising. Themed responses follow.

Many Social Enterprise Models

The main theme that emerged from responses was that social enterprises (SEs) use a wide range of models. For instance, one person noted that “there is no universal definition” of a social enterprise, while a second explained, “There are different flavours of SE across regions and across the nation.” However, as a third suggested, “It’s not all that different from traditional business.” Several respondents indicated that they “learned about many different models – non-profit, for-profit, charity, co-op, etc.,” and that SEs can exist as “a non-profit or for-profit enterprise.”

Some responses emphasized participants’ learning about the language surrounding SE models. Some participants thought that the terminology and concepts of social enterprises were explained well, and they had a clearer idea of how SEs fit into the larger organizational ecosystem. As one noted, “Social enterprising seems to be more relational than anything else.” Someone else explained that “SE has technically always been here – just the terminology is new.” One participant thought that “the language isn’t as important – some people don’t use the SE term for good reasons,” and another suggested that “concepts seem to be less important than principles.”

Challenges & Issues

Several participants mentioned the challenges and issues facing social enterprises and entrepreneurs who adopt this type of business model. One respondent highlighted the learning about “what challenges social enterprises face (financial, defining a creative revenue model that allows impact and profit).” Another focused on how people who take on the challenge of running an SE are often “having to deal with more scepticism around the case for social enterprise.” A third felt they had a “better understanding of the players and gaps,” while a fourth noted they had learned “a variety of coaching tools and techniques to better support” social enterprises in the region.

A few people stated that they would like to “do more research” or develop a better understanding of how to support SEs in the face of such challenges. For instance, one person explained, “I need to learn more about how to support non-profits, advising. Also, don’t feel confident with cooperatives.”

learning about “what challenges social enterprises face (financial, defining a creative revenue model that allows impact and profit”).

Several other responses contained examples of the issues discussed, such as the UN Sustainable Development Goals, economic values, B-crop tools, and how to use FBMC (Flourishing Business Model Canvass). There may be a demand or an opportunity to explore these specific issues in the future.

Passion & Potential

People were excited to learn about social entrepreneurs’ passion and the potential for SEs to do good in the region. One respondent learned that social enterprising “has impressive potential to transform the business world, for a more inclusive and sustainable version of contemporary capitalism.” Another highlighted the “scope of work that is already being done, and the impact SEs can make in the community and globally.” One participant learned that “social entrepreneurs are key to building this movement in larger organizations,” while another focused on how “social enterprise advocates are passionate” about the work they are doing.

Region's Organizational Ecosystem

Several people emphasized their learning about the ways social enterprises exist within the larger regional organizational ecosystem, and the politics of navigating this system when it comes to SE opportunities.

For instance, one person highlighted that: “I learned a lot about the ecosystem and what is currently happening regionally that I wasn’t aware of before,” while another felt “there are many ‘politics’ to navigate within the SE co-op, non-profit charity sectors.”

“social enterprising “has impressive potential to transform the business world, for a more inclusive and sustainable version of contemporary capitalism.”

A few respondents focused on the service gaps and duplications that exist in the current organizational ecosystem. One person noted they are “learning that a lot of organizations/ecosystem players are siloed and working independently; also duplicating efforts.” A second “learned about the gaps in support,” but noted that there is “a lot of support in Waterloo Region for startups.”

Additionally, as someone else stressed, it is “complicated to define or limit to an SE gap,” as the organizational ecosystem has silos and gaps that hinder productivity and a positive impact on the region. The complexity of this system was echoed in one other response: “Even though you are doing good in one area, you can easily be causing harm in another if you aren’t careful.” The systemic effects of social enterprises, they learned, cannot be ignored if SEs are aiming to provide the greatest possible good.

Impact Investments & Scaling Up

A final theme that emerged was how participants learned about “social finance and impact investing” and the “social impact investments available.”

As one person noted, “Social enterprises’ impact investing are on the rise.” Respondents learned that finances and investments of SEs are complex, especially when the impact of the SEs on society are considered as well.



“there are many ‘politics’ to navigate within the SE co-op, non-profit charity sectors.”

A couple of comments focused on this issue. One person said they are “still not sure how to balance ethics with capitalism, but have a better understanding,” while a second emphasized that their greatest takeaway has been: “You can make money and do good.”

The opportunity for scaling social enterprises was discussed by one respondent, especially “as we explore: how do we get social enterprises accepted for larger contracts/capital investments.” They explained, “I’m having a bit of a ‘go big or go home’ moment as we see the potential of some social enterprises to have huge impact.”

The systemic effects of social enterprises, they learned, cannot be ignored if SEs are aiming to provide the greatest possible good.

They also learned “how much quicker for-profit social enterprises can move than non-profit social enterprises. For better or worse sometimes.” The opportunities for successfully scaling social enterprises was a key takeaway for the group.

PERCEPTIONS ABOUT SOCIAL ENTERPRISES

2. Primary stakeholders were asked to reflect on how their personal perceptions of social enterprises have changed over the project’s life. Themes follow.

I’m having a bit of a ‘go big or go home’ moment as we see the potential of some social enterprises to have huge impact.

Changing the System, Changing Mindsets – Growing the Middle

The major theme emerging from responses was the ongoing need to change the ecosystem to better work with and support social enterprises. Several people focused on what they have learned about the ongoing challenges for SEs in the region. For instance, one noted, “It has been a real challenge to try to integrate into the SE community locally,” while a second said it “must be a systems issue that’s addressed.” A third explained, “I work in a beautiful bubble of social enterprise, but we are impacted by the traditional ecosystem, so we need system change.” Finally, a participant discussed their changing perceptions about need for “shifting traditional businesses toward social responsibility and helping non-profits diversify their revenue streams to be more profitable and have a larger impact.”

The major theme emerging from responses was the ongoing need to change the ecosystem to better work with and support social enterprises

Others learned that social enterprising can use “old business models,” and it “doesn’t always have to involve innovation.” One respondent pointed out the “need to define a strong business case to build momentum – traditional business (economics) metrics.”

Another said, “I look forward to the ‘shift to the middle’ where we can take best practices of both and make them work together.” Generally, participants perceived a need to address the current disconnect between SEs and the “traditional” ecosystem at large, even with the SEs that use older or more traditional business models.

Additionally, several people stated that the mindset about SEs must shift in tandem with the system shift. There is still some confusion about what social enterprises are, as one person learned: “LOTS of people (even social innovations) don’t know what an SE is.”

As another pointed out, “the language scares people off and pushes people away, even if we could classify them as an SE.” Additionally, a couple of people seemed to have some negative perceptions of SEs in the region. One noted, “The grassroots movement/group of social enterprises in our region has tainted my view of many SEs.”

I look forward to the ‘shift to the middle’ where we can take best practices of both and make them work together.

Another said that “they seem really jaded and oppositional.” Overall, these respondents feel there is a need for more education about social enterprises to shift mindsets, along with a shift in the traditional system to better align with SE values and goals.

Measuring Impact & Outcomes

A few respondents focused on the need to measure the impact and outcomes of SEs in a comprehensive, valuable way. One person did explain how their perception of the model has changed: “I see the model as much more practically implementable and adaptable.” But as another person succinctly noted, “Outcomes > intentions.”

LOTS of people (even social innovations) don’t know what an SE is.

As a result of their involvement, a third respondent said, they are now “trying to spend less time discussing concepts than finding solutions to bring people together.” A fourth participant noted that they now have a deeper “understanding of the need for SEs to measure their own impact (especially negative impacts, such as TOMS shoes.”

Outcomes > intentions.

Elaborating, they said that “outcomes are more important than intentions.” Being able to measure the impact and outcomes of social enterprises will be crucial when shifting the system and the mindsets of those working with SEs, either in close proximity or from afar.

The Future of Business

Several responses were very positive and commented on how social enterprises have the potential to change how businesses are run on a grand scale. One person said, “I see it as the future of business more generally,” while another explained, “I believe strongly in social enterprise as a solution to many problems.” A third was “impressed by levels of commitment of SEs and how they are overcoming adversity to create a business model they are passionate about and rally support.”

I see it as the future of business more generally.

SHIFTS IN THE SESW MODEL TO BETTER MEET THE NEEDS OF SOCIAL ENTERPRISES

3. Primary stakeholders were asked to comment on how the model shifted since it was first created.

Measuring Impact

Several participants spoke of recognizing and measuring the impact that social enterprises have had in the region.

it was important for the model of support to continue “getting SEs to think about how they’re going to measure or prove impact in addition to thinking about what they’re doing.”

For example, one person emphasized “recognizing the value of SEs and how they contribute to the economy,” as well as the “social impact” that SEs have on the community. A second one felt it was important for the model of support to continue “getting SEs to think about how they’re going to measure or prove impact in addition to thinking about what they’re doing.” A third person noted that they will be “writing up these learnings” and applying them to their shifting model of SE support in the fall.

A couple of responses noted the usefulness of the B-Corp survey in this context. One person thought supporting organizations should be “encouraging more SEs to use the B-Corp survey to judge where they fit.” The second explained, “I suggest all businesses do a Flourishing Business Model Canvas and look at the B-Corp requirements to see how they might adapt their model to have even more impact.”

Two other responses mentioned funding, or the lack thereof. One participant observed that, “Students are most frustrated with the lack of funding,” while the other suggested that they have seen some “guilt around making money” within social enterprises in the past, but they have become “more focused on social impact and personal image” as a shift in mentality.



developing a mindset of inclusion

Community Collaboration & Inclusion

A second theme that emerged from responses was the improvement in the community's collaboration with social enterprises, as well as organizations being more inclusive in what they consider to be SE businesses and how to support them. For instance, one person explained that "developing a mindset of inclusion" has been a key part of the shift since the beginning. Another talked about how this shift on how to do business differently "overall rounds out the conversation with community partners and businesses." A third participant observed, "Students generally start SEs based on personal experience with a system issue," or a desire to make a change in the community through social enterprising.

I've started using FBMC with traditional business, too.

A couple of responses delved into how the FBMC session impacts the developing relationship between SEs and other businesses. One participant discussed how "they attend more workshops networks event and pitch competitions," adding: "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." The other one felt that "It's more of a back and forth relationship, developing a business plan, applying for funding, etc.," and "because of this, I've started using FBMC with traditional business, too." Responses suggest that collaboration and inclusion will continue to be important when it comes to supporting social enterprises in the community.

Deeper, Ongoing Support

Several participants discussed how their organizations' support of social enterprises has deepened over time to meet the unique needs and values of the SEs. For instance, one person said, "Many of the SE clients are more ongoing than the regular SBEC clients." Another felt that the "big lesson is in depth, not breadth, of support while managing the growth of the SE community in London and number of requests." Someone else explained how their support works on multiple levels: "The program lead mandates programming and outreach, and the business analyst works with the client."

big lesson is in depth, not breadth

One respondent indicated that the selection process for deciding which SEs to support may have shifted for some organizations. In their case, they explained that the biggest change in how they offer support involves "selecting high-potential social enterprises. We used to work with everyone, and now we have greatly shifted to a work with fewer, but for longer/deeper level of support." The goal now is "to select high-potential,

high-impact organizations to dive deep with and see them grow." A second person observed a similar shift in the process of selecting which SEs to work with: "We are shifting to work with more advanced organizations with potential for scale, not just startups with a high failure rate. This is a new learning for us and will rely more heavily on external expertise."

A couple of people compared the SE model to traditional business models in their explanation of what support is needed to help them thrive. One explained that they “look to traditional business supports for models, ideas, and tracking the ‘let’s get serious’ movement.” The other participant made the distinction that supporting organizations should keep in mind: “I see it as the same business skills and competencies as traditional for-profits, but fuelled by a genuine impetus to improve the community.” For example, they continued, the “model of supporting SEs should include both trade business training, as well as ethical/personal/spiritual development.”

Adaptable & Flexible Support

A similar theme that emerged from responses was that organizations have adapted the ways they support various SEs depending on the unique needs of the enterprise. As a participant explained, “The linearity of the implantation at this partnership has shifted based on the partnership’s inputs, reaction, and contextualized needs.”

The shift for another person’s organization, for example, looked like this: “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.” A third participant pointed to a change in how their organization referred SEs: “We have had trouble fitting many SEs into our mandate, so we have started referring those that don’t fit into our mandate to their appropriate resource/support network.”

In another example, a shift was noted in the way an organization consults with SE clients: “We are not doing much one-on-one consulting with social enterprises because they are not coming to us for support, and, also, most of them fall outside of our RIC mandate. We have shifted to focus on programming, events, workshops, and community building.” As the goals and outcomes of social enterprises continue to shift in response to community needs and consumer demand, supporting organizations would do well to adapt by shaping their support in a way that positions SEs to thrive in the face of these changes.

We are shifting to work with more advanced organizations with potential for scale, not just startups with a high failure rate. This is a new learning for us and will rely more heavily on external expertise.

CHALLENGES AND BENEFITS OF DOUBLE AND TRIPLE BOTTOM LINES (SOCIAL, ENVIRONMENTAL, ECONOMIC)

Primary stakeholders focused on the challenges and benefits they are seeing when SEs focus on double and triple bottom lines. The main theme emerging from responses was that it is often a challenge for entrepreneurs to make a positive impact with their business on all three levels: social, environmental, and economic.

organizations have adapted the ways they support various SEs depending on the unique needs of the enterprise

As one respondent noted, “It's hard enough to make money and be a profitable business; considering other factors can make it even more challenging.” The tension arises between the goal of making a profit and the goal of being a sustainable or environmentally-friendly business. Another person explained this tension by giving an example: “It's difficult to make a positive impact on all three. If someone is making a positive social impact (e.g., selling shirts and sending a percentage of the profits to do good), then they may also be making a negative impact on the environment (e.g., the process of making those shirts).”

It's hard enough to make money and be a profitable business; considering other factors can make it even more challenging

Another perspective focused on how the decision-making process for social entrepreneurs is impacted by the pressure to meet double and triple bottom lines. They explained, “while a business model might work financially, it doesn't have the intended impact. Or vice versa.” As a result, “All decisions have to be made with a dual lens, which can lead to competing priorities. This makes each decision harder to manage.”

All decisions have to be made with a dual lens, which can lead to competing priorities. This makes each decision harder to manage.

Further emphasis was placed on the opinion that “the benefits of double and triple bottom lines are many.” For example, “with our clients, one of the most notable benefits is the tendency to support other local businesses, which strengthens the local economy and reduces environmental costs of sourcing farther away.” However, the person explained, “the challenge is designing a sustainable model that is feasible financially.”

There is a delicate balance between supporting a sustainable business model and making enough money to survive, and even thrive, in the region.

SUPPORTS THAT SOCIAL ENTERPRISES IN SOUTHWESTERN ONTARIO MOST NEED TO THRIVE

Respondents felt that a combination of capital and support in the form of business mentorship, skills, and knowledge was most needed for social enterprises and entrepreneurs in Southwestern Ontario to thrive.

On the capital side, one person noted that there was a need for “better access to capital for the early stage, and better support for scaling a business outside of Ontario without going to the States for support.” A second participant felt that “access to impact investors” would be beneficial.

On the support side, one respondent indicated that “business skills” were needed, and another suggested that there is a need for “knowledgeable business mentors.” A third felt that the greatest need was for “a solid business plan and connections.”

the challenge is designing a sustainable model that is feasible financially.

Finally, one person elaborated on their view that there is a need for “expert support,” since “this is lacking in our current ecosystems that focus on general coaching and the entrepreneur to do the work.” They noted that, “While mentorship is great, sometimes you need services like legal, accounting, business plan writing, and graphic design.” Social entrepreneurs are then “spending time learning to do work such as website development, logo design, etc. that needs to be done professionally.” This support would extend beyond mentorship to practical services that would help entrepreneurs to get their businesses up and running.

LEARNING ABOUT THE SESW PARTNERSHIP

What made it successful?

Structured Support

SESW Partners took some time to reflect on their experiences and consider what made the partnership so successful. When asked about what behaviours helped to make the SESW partnership a success, the main theme that emerged was the structured support that Pillar provided partners. The most commonly referenced support method was the weekly check-in calls with the partners. While several participants noted that the check-in “one-on-one call” was a successful behaviour, one person felt that “regular check-ins are good, but weekly is too frequently.” However, another person explained that this ongoing, expected and consistent support allowed the partners to have consistency and understand where partners were at.

Other positive partnership behaviours mentioned by participants included the “partnership strategy sessions,” the practice of sharing minutes, and the process of checking goals and deliverables. One person noted that the orientation was a prime point at which to set expectations. Someone else felt that the partnership taking the time to “celebrate each other’s successes” was another valuable behaviour. And finally, one person noted more generally that the partnership members “encouraged each other” throughout the process, which was a valuable behaviour.

Resource/Information Sharing & Collaboration

Partners also highlighted the practices of sharing resources and information, as well as their “collaboration to help entrepreneurs.” The practice of sharing resources across SESW was noted as a successful behaviour. Two people specifically mentioned “collaboration” as a valuable behaviour.

One person felt that the partnership’s practice of being “honest with each other” was a major asset, while someone else noted that making the effort to “travel to each other” was a positive behaviour. One person added that “job shadowing” was a helpful behaviour that contributed to the partnership’s success.



Two people called out the practice of sharing information with staff, specifically to help them gain “knowledge about social enterprise.” Helping staff to gain a deeper understanding of SE was encouraged by SESW as a behaviour to empower staff and teach them about the positive impact of social enterprise.

Flexible & Open to Change

The final theme emerging from the discussion of the partnership’s behaviours centred on its practices of being flexible in the face of change and keeping an open mindset. For instance, one person described the partnership as being “flexible and understanding of change,” while another felt that the partnership showed an “openness to input.” Other key terms from the discussion included “inclusivity,” “enthusiasm and flexibility,” and that the “Pillar was engaged and helpful.”

Participants also discussed how the partner’s “desire to better understand each partner’s local situation on the ground” was a behaviour that played a role in its success. Partner push to understand entrepreneurs’ real-life situations resulted in more effective problem-solving and troubleshooting.

What characteristics were helpful?

Open, Honest & Respectful

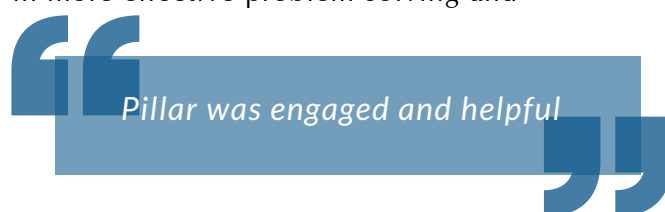
When they reflected on the characteristics that contributed to SESW’s success, participants brought up a wide range of positive traits and actions. The main theme emerging from responses was that the partnership members were open, honest and respectful in their approach to the project, no matter what challenges came their way. For instance, one person explained that the partnership has been “open with confusions,” while another spoke of the partnership being “honest and open about challenges.” As another participant noted, SESW has also been “open to collaboration.” Others characterized the partnership as being “authentic,” “respectful” and “open and honest,” and having a “willingness to share.”

Considerate & Reflective

Participants also discussed how the partnership has been “thoughtful” and “reflective” as it tries to help entrepreneurs, while still approaching challenges in a “humorous” and “curious” way, as partner members are “innovators” who are “trying to understand the realities” faced by people in the community.

Supportive

A third theme that emerged was characterizing the partnership as “supportive and helpful” as they participate in social enterprise ventures. People also highlighted the partnership’s “collaborative” nature and “constant support,” noting that SESW is “quick to respond to and support” entrepreneurs.



Leaders

Partners discussed how leadership has been a strong characteristic for the SESW partnership. One person mentioned that partnership members are “leaders” in the community, while another emphasized that the partnership is able to “acknowledge the strengths” of members and others, and to work with them. A third noted that the SESW partnership is filled with “self-starters,” while another felt they are “voices for our communities.”

partnership was geographically distributed with different expertise and context.

Diverse Knowledge

Several participants highlighted the SESW partnership’s broad span of knowledge, explaining that its strength lies in its diversity. As one explained, the “partnership was geographically distributed with different expertise and context.” Another discussed how the partnership “figured out how to be different” in a positive way.

Helpful Critics

Finally, partners liked that the SESW partnership has been full of helpful critiques of how entrepreneurs can improve their business and how members can improve the ways they work. One noted that members have been “critical of each other,” while another felt that the conversations within the SESW group was “constructively challenging.”

What is unique about this collective group of people?

Diverse Backgrounds & Skills

The main theme emerging from responses was that the group’s power stems from the diverse backgrounds, skills and expertise of its members. With its “diverse skills” and “diverse backgrounds,” the partnership has been able to play to a broad range of needs and expectations across the province. As one person explained, “Everyone is from different regions, with different experiences and expertise to share.” Another emphasized, “We all cover different ways to supporting enterprise.”

the partnership “figured out how to be different” in a positive way.

Having “diverse stakeholders and approach” meant that partners were able to be “non-competitive” and yet offer “different strengths,” such as coaches and coordinators.

The SESW project was “unique” in that it was partnership members’ “first time working together,” as one partner noted, while another praised the “unique manifestations of SE” that helped the partnership to be successful. One partner summed up the group’s superpower nicely: “We bring diverse backgrounds and skill sets together to support those who want to change the world.”

We all cover different ways to supporting enterprise

Widespread Support

Partners also called attention to the fact that the SESW partnership is able to offer widespread support, as they “cover a vast region” yet are able to be “collaborative across regions.” While the members are “geographically different,” they are still able to “strengthen capacity” when it comes to supporting the community and training people. As one participant explained, the group’s superpower lied in “co-designing as opposed to centralized direction.” By leaning into differences and unique elements within the group, rather than forcing members to conform to a rigid set of expectations and guidelines, SESW has become a stronger and more collaborative force for good in the community.

Leaders in Change

Participants considered the SESW partnership to be leaders in change. This drive to lead and support change across the region has been enhanced by the partners’ own ambitions and passions.

For instance, some felt that SESW members have been “thought leaders” and “change makers.” Thanks to its “focused” approach, as well as partners’ “passion and interest” in the businesses in the community, SESW has been able to foster “stronger business relationships” and promote growth in the region.

We bring diverse backgrounds and skill sets together to support those who want to change the world.

Different Perspectives

Finally, participants felt that one of the group’s strengths is the unique perspectives that partnership members bring to the table. One person highlighted the “different perspectives” within the group,

while another mentioned the “shared perspectives” – both of which can be of value, often even in tandem. A third person explained that the group has “very different motivations and perspectives,” while a fourth emphasized how the partnership “brings together ideas and resources from different perspectives.” The ability to share a range of perspectives and the insights derived from different experiences has the potential to make the group stronger and more effective as a whole.

the group’s superpower lied in “co-designing as opposed to centralized direction”.

What got in the way of this group’s success?

Time & Distance

When asked to consider what challenges the SESW partnership has faced, the main theme emerging from responses were the twin obstacles of time and distance. In terms of time, partners felt that the social enterprise project took a while to understand and act on, which was a challenge. One person noted that “Year 1 versus Year 2 were very different,” while another explained that they “wish there was a Year 3” since it “took a while to figure out what we were doing.” Another partner observed that the “Waterloo region started later,” which may have presented specific time-related challenges for social enterprise there.

In terms of distance, a few people felt that the “distance between us” and “not seeing each other in person a lot” were challenges. As one noted, constraints of both “time and distance made it challenging to work more closely.” The challenges presented by distance, such as the inability to meet frequently face to face, are to be expected with a project that spans such a large region.

Training & Resources

A second theme emerging from the partners' discussion was the challenge of fitting the SESW training and resources to their businesses' specific needs. For example, one participant noted that they had a "slow learning curve" when figuring out how to best work with the social enterprise model. Another felt that the "training does not quite fit with the programs we deliver."



A third explained how, "in hindsight, we should have sent different staff (who are equipped to give business advice) to be trained in SE."

In terms of resources, one person spoke of the challenge of "thinking beyond grants" when it comes to applying social enterprise practices. Another discussed how "measuring success is challenging" for entrepreneurs who want concrete evidence for how well the training has worked for their business. Better tools to address such challenges may be a help to future SE participants.

Programming

Participants discussed the challenges they faced with the SESW programming not being flexible enough to fit their unique needs. They felt that "more flexibility in programming" would be a benefit to social entrepreneurs, as it would allow for a "programming schedule to match with actual participants' needs." As one person explained, "CLA has different goals and abilities than other partners," so a "focus on youth training" might help to address this challenge. On a related note, one person stressed the need for ensuring a "common understanding of the project and goals" for participants in SESW.

Staff Turnover

Staff turnover was another challenge for participants. One person elaborated that the "reliance on part-time contract personnel" was specifically an issue that they had to deal with.

Buy-In & Participation

Finally, a few partners spoke of the challenges they faced when it came to community buy-in and participation. For instance, one person commented on the "low uptake regionally," while another observed on the need to "bring in more communities and people." One person would like more "time to share with their own community." Another partner thought that perhaps the SESW project could be "targeted towards business coaches" in the region.

What surprised you about the process or outcomes?

Enthusiasm & Buy-In

Participants discussed a few elements that surprised them when it came to the SESW's process or outcomes. The main theme emerging from responses was that people were pleasantly surprised by certain outcomes. For instance, two people were impressed by the community's interest in SESW. One person was "surprised by the amount of interest in social enterprises by youth," while another was "surprised at how many non-profits came forward for support." Additionally, "community buy-in," the "uptake in Huron," and the results of the "SE coaching program" were mentioned by participants as being positive surprises they observed during the process.

Processes

Several partners were surprised by the way certain processes worked or how other organizations do things in their region. For example, one person noted that they were surprised by the "social finance forum," while another was surprised by the success of "new events" such as "meaningful marketing and pitches." A third partner was surprised that the "weekly check-ins continued and were successful," which speaks again to their value. Finally, one person was surprised when "learning about other organizations' processes and thinking," which likely provided a fresh perspective on how others approach and solve problems.



Regional/Local Tensions

A few people highlighted the SESW's challenges that surprised them. One mentioned "local tensions," while a "competitive/non-collaborative" aspect of the process was observed less often "when connecting across regions rather than working within a certain jurisdiction." Someone else was surprised by the "challenge to adopt SE more broadly."



PART III: OBSERVATIONS AND RECOMMENDATIONS

OBSERVATIONS

The SESW partnership is effective at engaging social entrepreneurs, and shows evidence of benefiting those who receive supports and services, and suggests some areas for strengthening:

- Over the last two years, SESW partners provided entrepreneurship and business support to 261 social entrepreneurs/enterprises
- Short-term outcomes show that, overall, Incubator participants increased their knowledge of running a successful social enterprise and increased their professional network. Sales and revenue are reported by some Incubator participants to have increased
- Top suggestions for improving Pillar Incubator program to meet the needs of SEs included: more structure in the form of goal setting and check-ins, more access to business mentors, and funding/financial needs
- SEs who were interviewed noted that they benefited from the practical and tangible support, and from the ongoing encouragement and relationship development
- Using program data on the number of SEs accessing funding and ONE SEP report data for the number of SEs served, it appears that 17% of them accessed funding through SESW
- Interviewees identified that more work is needed to build awareness among entrepreneurs, and in the community, about the availability of business services and supports for social entrepreneurs/enterprises, as well as to continue educating people about what social enterprise is

Available data indicates that social enterprise-focused learning events held for business coaches/advisors and social enterprises are well-attended and beneficial for attendees:

- Over a two-year period, attendance at workshops and learning events exceeded 4000 people.
- Workshop feedback available for a selection of learning events indicates that participants report increased knowledge as a result of their participation in the workshops
- There is some evidence from the Ministry's survey of ONE members that there may be room for growth in helping coaches feel equipped to fully support SEs

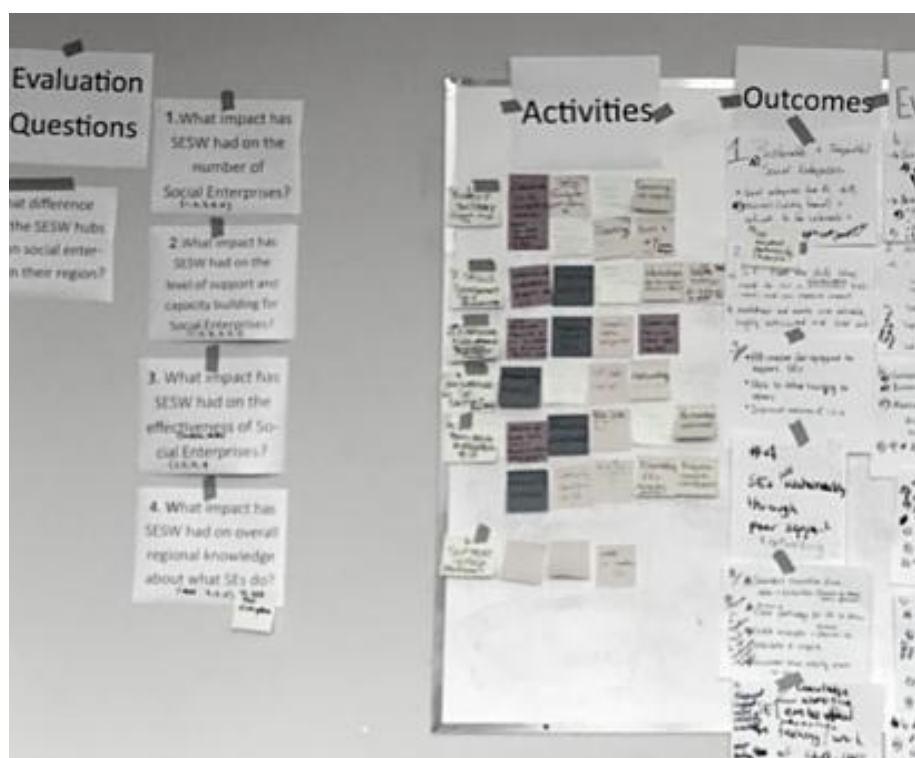
There is evidence that SESW partnership is increasing the capacity of business advisors and coaches to support SEs. Beyond evidence of increased knowledge about social enterprise, there is evidence that more business coaches and advisors are supporting social enterprises in tangible ways:

- As a result of the Huron County Small Business Centre team visiting all the Small Business Centres in their region and providing social enterprise training at four of them, business coaches now use the Flourishing Business Model Canvas
- In Waterloo, business coaches at the Small Business Centre are now identifying and serving socially-minded entrepreneurs as social enterprises – a shift from when they were identified and served as non-profits
- Through the development and implementation of the Social Enterprise Coaching Program, SESW has started to increase the capacity of business coaches via Pillar, and is expected to expand further

Huron County as prime example of integrating SE into a program - SESW Partner comment

There is evidence that SESW is contributing to the building up of the social enterprise ecosystem:

- New investments of almost \$1.4 million in the form of loans, grants, donations, and in-kind contributions were made available for social entrepreneurs from 18 different sources including financial institutions, private individuals, foundations, corporations, and government.
- At least 41 SESW-supported enterprises have become operational, moving from ideation and testing to revenue-generating, thereby increasing the presence of SE in the broader community. Roughly estimated, this translates to 16% of SEs served.



With time and more systematic data collection, stronger evidence will become available. SEs who were interviewed confirmed that the supports and services they received from SESW partners were valuable, contributing to their ability to identify as a social enterprise and progress their businesses development.

Mapping the impact areas of SEs supported by SESW to the UN Sustainable Development Goals, SESW's top potential areas of social impact appear to be:



More evidence for the community impact of SESW will come as data about the outcomes for business become more available. Along with this, it will become clearer what social impact SESW is collectively contributing to through the supported SEs.

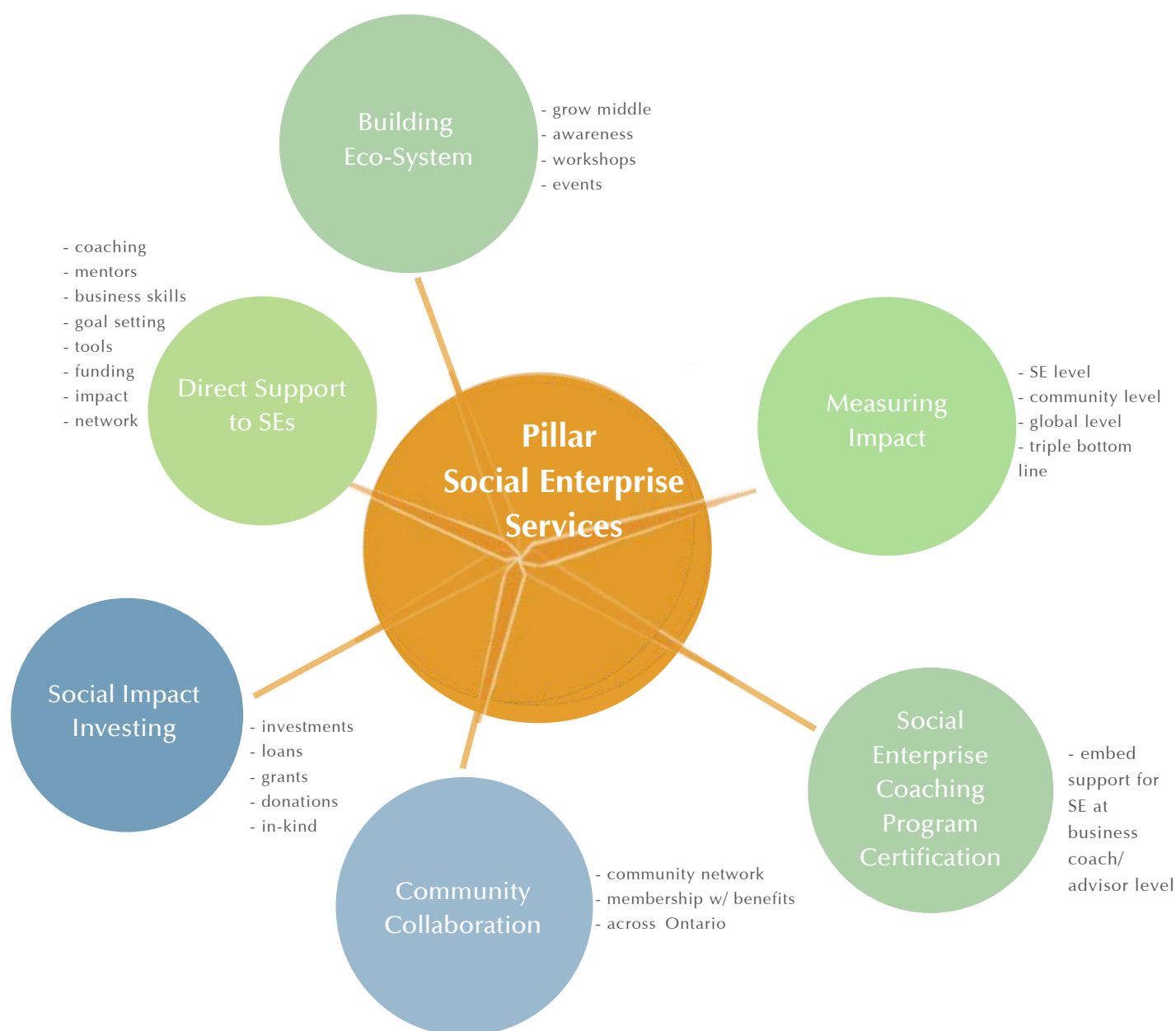
Primary stakeholders' contributions to the developmental evaluation offer helpful learnings stemming from their experience of being involved in the SESW partnership:

- There is no single model or universal definition of social enterprise
- Business skills/tools are essential for social enterprises
- Financial pressures are real and financial support is essential as social enterprises are starting out
- There is tremendous hope in a social enterprise approach that has the power to transform the world for good
- There is significant work to advance the local, provincial, and national eco-system so that social enterprises have a better chance of success
- There is great potential for impact investment to grow and support social enterprises' – "you can make money and do good."
- SEs are challenged to find effective and simple ways to measure social impact
- Some tools that have been developed have proved useful. For example: B-Corp Survey, Flourishing Business Model Canvas, the Meaningful Market, pitches and the Social Enterprise Coaching Program.
- Concentrated effort to support a few SEs seems more effective than broader support for many
- Flexible models of support are important, customized to the needs of SEs and their developmental stage
- Business mentorship appeared to work well for some SEs
- The SESW partnership approach was beneficial in building the capacity of each region's ability to serve SE even though each region's approach was unique to its region
- The collaborative was successful because it provided a structure support, resources and information sharing, flexibility and openness to change.
- The members each brought unique contributions that included characteristics such as: open, honest, respectful, considerate, reflective, supportive, leaders with diverse knowledge
- The collaborative was challenged by time & distance, only having two years to develop, uniqueness of each regionality which at times made it difficult to provide programming, buy-in & participation, and staff turnover

RECOMMENDATIONS

To continue building on the efforts of the SESW partnership over the past two years and maintain momentum, it is recommended that Pillar continues to provide supports throughout Southwestern Ontario and beyond. Receiving funding to continue this work would be ideal. However, even without funding, Pillar could offer these services as a social enterprise venture. Additionally, each partner could take the findings from this program evaluation and work towards continued SE support based on the findings.

Given those findings, the following are the service categories that Pillar could offer to the Southwest region and beyond.



1. Building the Eco-system

While considerable progress was made in terms of building the Social Enterprise ecosystem through the work of the SESW partnership, continued effort is required to create fertile ground where social enterprises can grow and thrive. Participants in the developmental evaluation articulated the need to continue shifting the system in such a way that businesses focused more on corporate social responsibility and non-profit find revenue streams as social enterprises. There is still significant work to be done for the mainstream to understand the value of social enterprises, and for social enterprises to mature and find their rightful place in the economic ecosystem of communities. There are opportunities to do this through awareness-raising workshops, events, partnership-building, and advocacy.

2. Measuring Impact

One of the greatest challenges that social enterprises face is the ability to measure double or triple bottom lines as evidence through both the impact and developmental evaluation findings. In order for the social enterprise sector to continue to grow and mature, evidence of their contribution towards social and environmental common good will be essential. The beginning of this work was seen through the SESW partnership and needs to continue to be a focus.

Pillar could support this work at a variety of levels:

- Social Enterprises directly: Provide workshops and coaching so that SEs can identify a small number of key metrics that can be tracked and reported
- SESW Partners and other communities: Support and/or maintain a client database of social entrepreneurs/enterprises that access direct support for performance monitoring and outcome reporting. Being able to track basic information will assist in contributing to the story of SE in each community
- Service categories: For each service that is offered, select one or two key indicators to track so the story of how SEs are being supported can be easily reported. This would include a more comprehensive yet simple evaluation framework that would cover
 - Building the Ecosystem
 - Measuring Impact
 - Social Enterprise Coaching Program
 - Community Collaborative
 - Social Impact Investing
 - Direct Support to SEs

No money, no time, no resources...ask 1 evaluation question (Favaro, personal communication, April 18, 2019)

More details on measuring impact can be found in the Appendix.

3. Social Enterprise Coaching Program

While this was a relatively new development that was initiated by Pillar, it appears to have gained significant traction, been successfully received, and holds great promise in how SE can be supported in spaces that already exist in many communities. Embedding support for SEs at the business coach/advisory level will be a way to sustain support for SEs moving forward. It will be valuable for Pillar to consider turning the program into a formal certification rather than a certificate program.

This evaluation suggests that for social entrepreneurs to have successful social enterprises, it's important to have knowledgeable business coaches who understand and value social enterprise, and who provide structure, encouragement, guidance, and critical analyses of business ideas. Having a dedicated SE coach and embedding social enterprise in the business coaching and advisor program seems to work.

4. Community Collaborative

Based on the experience of the SESW partners, it appears that having a collaborative approach to support SEs within the context of each community is beneficial. The structured support, resources and information sharing, as well as the variety of expertise and perspectives was seen as invaluable by partners. Pillar as the backbone played an important coordination and support role that the SESW partners appreciated. Moving forward, if there is no funding available, Pillar and those partnered with it may want to explore a membership model where Pillar continues to build an SE network of communities and provides Community Collaborative members with a variety of benefits/services for the membership fee. This model could then expand to include other communities interested in the support.

5. Social Impact Investing

As with any business, funding is essential. VERGE Capital is a well-established social impact investment service of Pillar. Serving Southwestern Ontario, VERGE Capital connects caring local investors with local social and environmental enterprises. VERGE Capital has catalyzed over \$3.5 million in impact investing, shifting capital towards the community's most pressing social and environmental challenges. It would be valuable for this arm of Pillar to continue to be connected and aligned to this work.

6. Supporting SEs Directly

While all of the other service areas (as described above) will support SEs, there may still be room for Pillar and SESW partners to provide direct support to SEs. The approach of embedding SE support into ONE SEP members seems most sustainable. However, if funding grants are available, SEs could gain from direct support through incubator models. From this evaluation, it appears important that a coaching and mentoring model is anchored on the development of business and impact evaluation skills. Finding funding and developing a professional network and support was also seen as essential. Concentrating efforts to support a few SEs was seen as a better model than supporting many in a less focused way.





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APPENDIX A: SITE LEVEL PROGRAM RESOURCING AND IMPLEMENTATION

Table: Social Enterprise Support Organizational Structure by Partner

Partner	Staffing (FTE)	Funding	Staff Role	Nature of Employment	Client Group (SESW focused only)
Huron County SBC - a partner in Sept 2017	0.5	MEDG	Business Coach - 20% of role is SE coach	F/T in org SE support is extension of regular duties	Huron County based Entrepreneurs and business coaches
Innovate Niagara – partner in March 2017	0.5	MEDG	Program Coordinator First point of contact	F/T in org SE support is extension of regular duties	Business coaches
EPICentre Windsor – partner in April 2017	0.5	MEDG	Program Coordinator	Contract	Student entrepreneurs
Waterloo Region – partner in summer 2018	0.5	MEDG In kind	Program Coordinator Program Manager	Contract F/T in org SE support is extension of regular duties	Business coaches Entrepreneurs
Pillar	1	Libro and LCF	Full time SE coach	Full-time	London-based Social Entrepreneurs
Pillar	1	MEDG	Online animator	Contract	Social Entrepreneurs, business coaches, ONE members
Pillar	1	MEDG	Program Manager	Contract	Social Entrepreneurs, business coaches, ONE members

Source: Verbal communication. Daniel Fuentes. Pillar Nonprofit Network. July 2018.

Table: Description of Activities – How Each Partner Implements the SE program

Partner	Program Component				
	Direct support	Skill Development	Building Ecosystem	Learning and Development for Business Coaches	Networking for SE
Huron County SBC	Coaching Supporting SEs Training SEs	Workshops and Events for SEs	Story sharing (blogs)	Business coaches receive training on SE; Workshops	Meetups
Innovate Niagara	Access to resources Mentoring	Workshops	Educating stakeholders Community outreach	Learning about SE	Meetups
EPICentre Windsor	Access to resources Mentoring Connect clients to in-house volunteer mentors who are entrepreneurs	Workshops and Events	Educating stakeholders Community outreach	Do not target business coaches/advisors. Sometimes they come to workshops	Provide networking opportunities for clients

Waterloo Region	Connect to experts	Workshops and Events for Business Coaches and Entrepreneurs	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	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; online Basecamp group with resources	Social enterprise meetups (aka, Socialpreneur chats)
Pillar Digital	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.					

Source: SESW Primary Stakeholder Evaluation Planning Co-Design Session. August 2018. Supplemented with program data provided by regional partners

Table : Co-Developed Evaluation Questions

Impact Evaluation	Developmental Evaluation
<ol style="list-style-type: none"> 1. What impact has SESW had on the effectiveness (knowledge, skills and sustainability) of social enterprise? 2. What impact has SESW had on the capacity of business support programs/ONE members to support social enterprise? (ecosystem) 3. What impact has SESW had on the number of social enterprises in the SESW region? 4. How is SESW contributing to the UN sustainability goals at the local level? 5. What evidence is there that SESW collaboration contributed to the outcomes achieved? 	<ol style="list-style-type: none"> 1. What has been learned about social enterprises/enterprising? 2. What are the challenges and benefits of double and triple bottom lines (social, environmental, economic)? 3. How did the SESW model shift to better meet the needs of social enterprises? 4. What is it that social enterprises in Southwestern Ontario most need to thrive?

Table: Evaluation Matrix

Evaluation Question	Indicators	Workshop feedback	Interviews	Secondary Sources	Regional Partners
What impact has SESW had for social enterprises?	SE participation by regional partner and by service/support			Interim and Progress Reports	x
	Changes experienced by SEs		x	Incubator survey	x
	Funding received by SEs				x
	Reported value of business supports and services provided to SEs		x	Incubator Survey	x

What impact has SESW had for ONE Members?	ONE member participation				x
	ONE member business coaches/advisors report increased knowledge, confidence to support SEs	2017 Professional Development Feedback Report		ONE SEP Year 1 Survey	
	Increased provision of SE tailored tools/resources/services			ONE SEP Year 1 Survey	
	Challenges to serving SEs			ONE SEP Year 1 Survey Interim and Progress Reports (?)	X
What impact has SESW had on the social enterprise ecosystem?	# of SEs that moved from ideation and testing to revenue-generating			Incubator survey	X
	New funding/investment from external sources obtained (ecosystem)			Interim and Progress Reports	x
	Value of the partnership from the perspective of regional partners			SESW Strategy meeting notes	
How is SESW contributing to social/environmental/cultural impact?	Mapping SEs receiving ongoing support from SESW to UN sustainability goals (excluded SEs/aspiring SEs whose engagement with a partner was limited to discovery meeting)			SEs reported in Interim and Progress Reports performance measures	
	SEs are operational 1 or more years out & revenue generating			Incubator survey	x
	Economic and employment metrics			Incubator Survey	x
Developmental Evaluation – Learning Along the Way	What has been learned about social enterprises/enterprising?				x
	What are the challenges and benefits of double and triple bottom lines (social, environmental, economic)?				x
	How did the SESW model shift to better meet the needs of social enterprises?				x
	What is it that social enterprises in Southwestern Ontario most need to thrive?				X

APPENDIX B: REGIONAL PARTNER PROGRAM DATA REQUEST

In support of the evaluation of SESW's impact on social enterprise in Southwestern Ontario, we are interested in gathering program data from SESW partners. This is essential data for the formal evaluation of your work.

Recognizing that each partner is unique in its service delivery model, we anticipate that the data you will be able to provide will vary.

We are asking that where you are unable to provide the data requested, please make a note as to whether or not you would see value in collecting that data in the future or if it is not a key measure/indicator of program effectiveness in your context.

Please complete the following table indicating data availability.

Data Requested	Do you collect this data?
Date you became a SESW partner	
Impact for ONE Member Business Coaches/Advisors	
# of business coaches, advisors served directly (total unique)	
What does direct service provision look like/involve?	
# of workshops/educational events held	
# of attendees – total and unique	
Workshop evaluation forms from business coaches/advisors	
Business coach data on work they do with SEs	
Thinking about the business coaches/advisors you have served; can you think of examples where there is evidence of significant change?	
Profile of Social Enterprises Served	
# of entrepreneurs, businesses, researchers served since you became a SESW partner total	
# of entrepreneurs, businesses, researchers served who fit the definition of a Social Enterprise.	
In the survey, social enterprise is defined as: selling goods or services in the market for the purpose of creating a blended return on investment, both financial and social, environmental and/or cultural	
Impact profile: social enterprises served since becoming a SESW partner – area of impact - For each of the 17 impact areas - # of enterprises identifying as their enterprise's focus	
Services Provided to Enterprises	
# receiving direct support from a business coach/advisor (SE and non-SE)	
# of social enterprise-focused network events hosted	
# of enterprises who attended these events (total and unique) (SE and non-SE)	
# enterprises accessing funding (SE and non-SE)	
# of enterprises with a mentor/who had a mentor (SE and non-SE)	
# of workshops held for enterprises	
Workshop attendance (total and unique participants) (SE and non-SE)	
Other information you may be able to provide that you feel is important for assessing impact of SESW	
Program Impact (changes in knowledge, attitude, practices, client feedback with regards to value of services provided, observations of significant changes)	

Data Requested	Do you collect this data?
What client feedback data do you have that you can share, and in what form is it available (example, summary report of workshop feedback sessions; hard copies of feedback surveys)	
Thinking about the businesses you have served; can you think of entrepreneurs where there is evidence of significant change?	
Community level impact: impact on economy and employment – Key Business Metrics	
# moved from ideation and testing to revenue generating	
# with a minimum 12 months generating revenue	
# with at least 24 months generating revenue	
total and average revenue/enterprise	
Total and average sales/enterprise	
current employment figures: # f/t – 30+ hours/week # p/t <30 hours/week # seasonal – 30+ hrs/wk for more than 2 weeks but less than 8 months # freelance, contract, on-call (hired for specific project or term) # volunteers including unpaid interns	
If unable to provide specifics, are you able to provide data on the # of enterprises which grew in terms of employment without providing actual employment figures?	

APPENDIX C: LIST OF NEW INVESTMENTS

New Investment	Brief Description	Amount
2018 ONESEP Sept Interim Report		
EPICentre: RBC Founders Program	\$6000 from RBC Founders program was awarded to AidaNote and GreenerBins Composting to support growth of business	\$12,000
EPICentre: Libro Prosperity Grant	Libro Prosperity Grant awarded \$5000 to Enactus Liberty Project	\$5,000
Innovate Niagara: Ontario Media Development Corporation	\$100,000	\$100,000
Innovate Niagara: Pitch Competition	\$25,000	\$25,000
Innovate Niagara: SONAMI funding for new iteration of product	\$20,000	\$20,000
Innovate Niagara: Niagara Prosperity Initiative	\$50,688	\$50,688
Innovate Niagara: Niagara Prosperity Initiative	\$54,680	\$54,680
Pillar: Bakers Dozen	VERGE Capital social impact investment of \$80,000.	\$80,000

March to Sept 2017 ONESEP Report		
LEDC	donation to support The Accelerator in London specifically to support social entrepreneurs	\$500
private donation	Private donation to high performing social entrepreneur in London, a member of London's incubator and accelerator	\$100,000
TVDSB	Thames Valley District School Board has committed two full time teachers to the Innovation Portfolio to explore social enterprise schools (RevEd, STEAM School St. Thomas) - annual	\$200,000
Libro Financial	investment into EPICentre accelerator, focused on supporting social innovators as well as traditional entrepreneurs	\$89,000
Innovate Niagara Pitch Competition Prize	raised from the community (sponsored), went to 2 SEs - Code Niagara and Underdogs Boxing Club	\$6,500
Dineasy	VERGE Capital Startup Fund Loan (Pillar Nonprofit Network)	\$10,000
Homegrown	\$50,000 VERGE Capital Startup Fund Loan (Pillar Nonprofit Network)	\$50,000
The Abby Fund	\$1500 pitch prize; The Meaningful Market (Pillar Nonprofit Network)	\$1,500
Turn Key Renewable Transportation	\$100,000 external investor (Pillar Nonprofit Network)	\$100,000
Turn Key Renewable Transportation	\$30,000 Fuel Injection Grant funded by Federal Economic Development Agency (Pillar Nonprofit Network)	\$30,000
The Abby Fund	\$7500 from Western Propel Accelerator (Pillar Nonprofit Network)	\$10,000
Ascend Applications	\$3000 Western Seed Your Startup pitch competition (Pillar Nonprofit Network)	\$3,000
Final Report		
	Ontario Creates	\$25,000
	Pitch Competition	\$25,000
	Ontario Centres of Excellence	\$10,000
L'Arche London	Innoweave Social Enterprise Grant	\$9,500.00
Rebel Rags	Line of Credit from LCF	\$60,000
London Environmental Network	Founding member investment in new service - Green Community Hub	
general	Huron County surpassed its financial commitment to SE and will continue to support in years to come	
general	Libro Credit Union's Prosperity Grant - enables EPICentre to continue to support SE	
Frontline Medical	loan	\$50,000
Do Good Perks	loan	\$5,000
Green Apple Pay	loan	\$ 100,000
Supports Health	loan	\$ 100,000
Carmina de Young	loan	\$ 50,000

APPENDIX D: SOURCES OF MEASURES FROM THE RESEARCH

Source	Description
Big Society Capital's Outcomes Matrix https://www.goodfinance.org.uk/impact-matrix Individual level and community level measures	An open source library of impact measures appropriate for 9 impact areas and their corresponding beneficiary group Intended to help social investment financial intermediaries (SIFIs) and social enterprises select measures that are researched, validated and evidence-based
Impact Reporting Investment Standards https://iris.thegiin.org/metrics	IRIS is the catalog of generally accepted performance metrics that leading impact investors use to measure social, environmental, and financial success. Individual organizations can select IRIS metrics that are appropriate for their work
B Impact Assessment https://bimpactassessment.net/ Need to create an account to do this	A tool to help businesses assess the value they create for their customers, employees, community and environment. B Impact Assessment includes standards, publicly available benchmarks and tools to help businesses improve their impact over time
toniic Sustainable Development Goals Impact Theme Framework https://www.toniic.com/sdg-impact-theme-framework/	The goal of this framework is to allow impact investors to align their investments with the SDGs and thereby find greater alignment and synergy in global investment opportunities
Canadian Index of Wellbeing https://uwaterloo.ca/canadian-index-wellbeing/what-we-do	This is a conceptual framework and metrics used to measure changes in Canadians' wellbeing. Metrics are organized into 8 domains, dimensions and subdimensions, with indicators for each dimension or subdimension.

APPENDIX E: IDEAS OF MEASURING IMPACT For Social Enterprises

Practitioners quoted in a Forbes three-part series on impact measurement: “How Social Entrepreneurs Begin to Measure Impact” and “Impact Measurement: How Much is Too Much? How Much is Not Enough” (Thorpe) offer the following ideas:

- When starting out, start small and simple – metrics can be expanded as the company grows
- Define the theory of change – the ‘if-then’ statement – and track measures that test how well things are occurring
- Translate the high-level vision to 3 to 5 key quantifiable metrics and articulate what success over the long term looks like in terms of these metrics – number of trees planted, livelihoods created or investment made
- Common metrics can be # of people reached, # of lives impacted, job creation and geographic coverage
- Focus on measuring the one thing you are looking to do
- Measure what is critical to the survival of the enterprise; metrics that tie directly with business operations

- Balance quantitative data with narratives
- Look to existing frameworks for existing outcome and impact metrics – some examples are listed in the Appendix

For SESW Partners

Build and maintain a customer database of social entrepreneurs/enterprises that access direct support for performance monitoring and outcome reporting. Basic items that could be recorded include:

- Name of enterprise
- Stage of development when first engage
- Social impact area
- Services accessed
- Funding accessed
- Stage of development at 6 months, 1 year, 2 years

For Social Enterprise Coaching Program

This program is an important outcome of the SESW partnership. It has the potential to provide business advisors with a solid foundation and tools to equip them to support social enterprises.

The implementation of this program should be monitored. Some suggested metrics include:

- Number of training sessions delivered
- Session registration
- Program completion rate
- Session feedback
- Follow up feedback 6 months after the completion of the full program (including on-line training modules)
- Financial data (costs and revenues)