Research Findings: Social Enterprise in Nova Scotia

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SUMMARY

Social enterprises have been a part of life in Nova Scotia since colonization and gained great prominence in the 1930s. Governments are recognizing the role of the social enterprise sector in creating a sustainable and inclusive economy and the Nova Scotia government is interested in developing focused public policy initiatives that will support the sector and enable its growth.

Since November 2009, the government of Nova Scotia (NS) has been facilitating a Social Enterprise Working Group comprised of federal and provincial civil servants and other professionals from various organizations across the province. By early 2011, the Working Group produced a discussion paper that explores social enterprise as a concept. The discussion paper refers to social enterprise as "businesses or organizations operated for the purpose of tackling social, economic or environmental challenges". There is no agreement on what constitutes a social enterprise- different groups have different definitions based on specific objectives. The choice of the working group is influenced by the need to be inclusive

This research study on the nature and impact of social enterprises is adding to the work of the Social Enterprise Working Group and it is funded by the Nova Scotia government. Using the definition of a social enterprise as any organization that operates like a business, produces goods and services for the market, but manages operations and directs surpluses in the pursuit of social, environmental and community or cultural goals, an inventory of 1098 Nova Scotia organizations was compiled through networks of researchers, organizations, businesses and agencies. These organizations were contacted in July to fill in our survey and 109 social enterprises completed the survey.

The survey responses revealed that 70% of the listed organizations meet the social enterprise criteria. Based on an extrapolation from Statistics Canada data and a recent study at Cape Breton University (Financing the Social Economy in Atlantic Canada, 2009), we estimate that the survey response sample accounts for 12-13% of Nova Scotia's social enterprises.

Of the 109 surveyed social enterprises, 70% are non-profit organizations and 78% of those organizations are also registered charities. This a geographically diverse sector, with organizations spread throughout the province. More than half of all responding social enterprises have head offices located in the Halifax Regional Municipality and most of those serve only their local/city/district area. In total, half of the social enterprises (49.1%) are located outside of the Halifax area: distributed throughout Cape Breton (19.1%), Antigonish (7.4%) and other rural mainland communities.

The majority of social enterprises are medium-size organizations: 72% of the social enterprises in the response sample had revenues above $100,000, with the highest frequency (30.7%) in the $100,000-500,000 range. The average number of full-time employees is 13.

Surveyed organizations pursue social enterprise primarily to fulfill a social purpose or mission (75.7%). Many (44.7%) are multi-purposed – employment, income generation, social, cultural and/or environmental missions and 69.7% identified their top priority as meeting other community needs (social, cultural and/or environmental); by contrast only 4.6% identified generating surplus revenues as their top priority.

The responding social enterprises employ 2,672 full-time, part-time, and seasonal workers and an additional 419 contract workers. Based on $57.6 million in wages paid by 87 responding organizations in 2010, we estimate that the social enterprise sector in Nova Scotia paid $480 million in wages and provided 13,018 full-time-equivalent jobs (based on the benchmark Nova Scotia average annual salary of $36,917).

Employees of responding organizations also enjoy a high level of benefits such as drug plans (57%) and pension plans and/or RRSP options (37%). Additionally, the overwhelming majority of employees are women (median 80%) with at least a quarter of responding organizations indicating an all-female staff. We also learned that social enterprises tend to employee mature staff; on average 67% of an organization’s employees are over the age of 35 and 18.1% indicated that they have no staff aged 35 years or under.

In 2010, 88 responding social enterprises generated over $98.1 million in revenue, including sales, grants, loans and donations and 86 organizations had a total net surplus of almost $11 million. Over 85% of responding social enterprises identified government funding as a source of grants, loans and donations for the surveyed organizations. More than half (55.3%) of the responding organizations receive grants, loans and donations from multiple sources. Over 83% of the 92 responding organizations indicated operational grants were the primary purpose of securing grants, loans and donations.

Most responding social enterprises (77.8%) sell goods and services in multiple business sectors. At 38.9%, education is the single largest sector followed day cares (20.4%), social services (17.6%) and employment (16.7%).

Social enterprises often serve multiple demographic groups; in this survey, 70.6% of respondents served, trained and/or employed at least two demographic groups. In 2010, respondents employed at least 2,220 full-time, part-time and seasonal employees as part of their social mission, provided training to 34,797 and served at least 801,475 persons

When asked to rank their top five supports, development priorities and barriers faced in operation of their social enterprise, respondents identified talent retention and skilled staff as the top support used. Their top development priority is to raise awareness and demonstrate the value of community and social enterprise, while accessing ongoing government funding was clearly identified as the top barrier to success.

The Research Study

The Atlantic Council for Community and Social Enterprise (ACCSE), in partnership with the HUB Halifax and Cape Breton University, and funded by the Government of Nova Scotia, undertook an inventory and survey of social enterprises in Nova Scotia beginning in June 2011. Similar research has been conducted in three western provinces and this research project included input from the academic researchers involved on an ongoing basis. The purpose of this research project is to determine the size, scope and impact of social enterprises in Nova Scotia and thus inform policy on supporting this sector.

THE CONTEXT

Nova Scotians have a strong history of bridging community and business in order to meet the needs of their communities. Early credit unions and cooperatives were greatly expanded by the Antigonish Movement of the 1930s, influencing community development across the Maritimes and Western provinces. (Alexander, A., 1997) Since then, Nova Scotia's social economy has continued to grow and evolve, challenged to meet the increasing gaps not filled by other support systems, the public or private sector; particularly important during tough economic times. The success and challenge of the social economy is its multiplicity: social economy organizations often span business sectors, serve multiple demographics and may have two or more social, cultural or environmental objectives. For example, an organization may operate a business, staffed by persons facing employment barriers, that provides a much needed service to the community, and generates revenue that supports its other charitable operations. The efficiency and multiplier effect of single social economy organization is what makes it a valuable part of the economy. At the same time, no two organizations are identical and definitions on what constitutes the social economy "…vary according to context, over time, and sometimes even depending upon the will of the government programs aimed at supporting its development." (Bouchard, Ferraton & Michaud, 2006, p.4)

For this research project, we follow a broad definition based on that of Quarter, Mook and Armstrong (2009, p.4):

Social economy is a bridging concept for organizations that have that have social objectives central to their mission and their practice and either have explicit economic objectives or generate some economic value through the services they provide and purchases they undertake.

SOCIAL ENTERPRISE

The definition of social enterprise used in this survey is any organization that operates like a business, produces goods and services for the market, but manages operations and directs surpluses in the pursuit of social, environmental and community or cultural goals.

Included in this survey are independent service providers, who may receive funding from a government department for providing direct personal services, but do not charge individual users; for example, not-for-profit nursing homes and day care centres.

There is limited awareness of the term "social enterprise" and this study tested that: it asked if, based on this definition of social enterprise, the respondents would describe their organization as a community or social enterprise; 84% of respondents confirmed they are indeed social enterprises however several comments indicated that prior to this survey they may not have used this term to describe their organization.

RESEARCH DESIGN AND METHODOLOGY

INVENTORY

The inventory for the survey was built through networks of researchers, organizations, businesses and agencies and includes approximately 1,098 organizations that appear to be social enterprises as defined for this study. This inventory is by no means exhaustive but is a substantial and evolving database of social enterprises in Nova Scotia.

According to the 2004 Statistics Canada, National Survey of Nonprofit and Voluntary Organizations (Imagine Canada, 2004), there are 5,829 non-profit and voluntary sector organizations in Nova Scotia. The researchers' experience at Cape Breton University, in conducting the recent study on Financing the Social Economy in Atlantic Canada, indicated that approximately 16% of listed non-profit and community organizations are social enterprises; suggesting that the number of social enterprises in Nova Scotia is approximately 930.

The research team attempted to reach the 1,098 identified organizations and a total of 156 surveys were collected by telephone, in-person and online in July 2011; a 14% response rate. Of the completed 156 surveys, a further 47 (30%) were removed because they did not meet the social enterprise criteria as defined for this project. Based on the starting inventory of 1,098 organizations that appeared to be social enterprises, we can estimate that 769 (70%) will turn out to meet the social enterprise definition.

It is reasonable to assume that the actual number of social enterprises in Nova Scotia will lie between 769 (based on our inventory) and 930 (extrapolated from Statistics Canada data); suggesting that our research study surveyed 12-13% of Nova Scotia's social enterprises.

Questionnaire

The questionnaire was based on one used by the BC Alberta Social Economy Alliance (BALTA), prepared by Dr. Peter Elson, Mount Royal University and Dr. Peter Hall, Simon Fraser University for surveys conducted in British Columbia, Alberta, and Manitoba. The BALTA questionnaire was augmented, with additional questions on sector impact based on input from this research project's community partners; however, the core data fields were retained to ensure comparability with surveys in other regions in Canada.

“Other”

In several questions, a choice of ‘Other’ was provided with space to expand on that answer. Where the respondent provided an answer in the ‘Other’ category that fit one of the choices provided, the researcher reassigned the answer to the appropriate category.

Two categories were created after data collection to capture frequent responses in the ‘Other’ employment benefits category: Insurance (life and/or disability) and RRSP (options).

Financials

The majority of respondents included the requested financial data. We tested for consistency and two outliers were removed from all financial data. Where the grant amount is unknown, the sales amount was accepted. Where the calculation ‘sales = revenue – grants’ showed errors greater than $1000, those figures were excluded.

Rankings

Survey respondents were asked to rank their top five supports, development priorities and barriers faced in operation of their social enterprise. In all questions, respondents were given more choices than rankings. For analysis purposes, where answers were left blank or given a number outside the 1 (most important) to 5 (least important) ranking, these answers were given a 9 to show their relative value as least important. A sum of all response values for each question was used to determine overall ranking and comparisons.

Key Findings

Structure

The average age of responding organizations is 28 years, with less than a year difference in when they were formed and when they began selling products or services. Social enterprise, as defined for this survey, may be non-profit or for-profit, a corporation or a cooperative. Approximately 70% of the responding social enterprises identified as a non-profit organization and 78% of those organizations are also registered charities. Where organizations identified as “Other” structure, they are for-profit sole proprietorships that meet the social enterprise definition based on their primary mission to provide employment and opportunities to owners facing barriers. Over 51% of the 107 responding social enterprises have a membership base with a total of at least 36,182 members (three organizations indicated a membership base but did not provide membership numbers). Where the organization has a parent organization (26.6%), the relationship to their parent is an in-program, project or department (11%), a separate organization (8.3%) or

an independent organization (7.3%).

Purpose or Mission

Surveyed organizations pursue social enterprise primarily to fulfill a social purpose or mission (75.7%). Many organizations (44.7%) are multi-purposed – employment, income generation, social, cultural and/or environmental missions. Not surprisingly, 69.7% of social enterprises identified their top priority as meeting other community needs (social, cultural and/or environmental); by contrast only 4.6% identified generating surplus revenues as their top priority.

Looking forward, over 62.4% of responding organizations indicated they intend to start or expand their entrepreneurial activities in order to support their mission.

EMPLOYMENT

The 109 surveyed social enterprises provide paid employment to 2,672 people as full-time, part-time, and seasonal workers. An additional 419 people were employed as freelancers and contract workers. In addition to paid employees, the surveyed social enterprises involve 1,119 full-time volunteers and 2,498 part-time volunteers. Only two organizations self-identified as entirely volunteer-based (no full-time, part-time, seasonal or contract workers). Of the 105 responding organizations, an average of 26.9% of full-time, part-time and seasonal employees are male and 41.2% are under the age of 35.

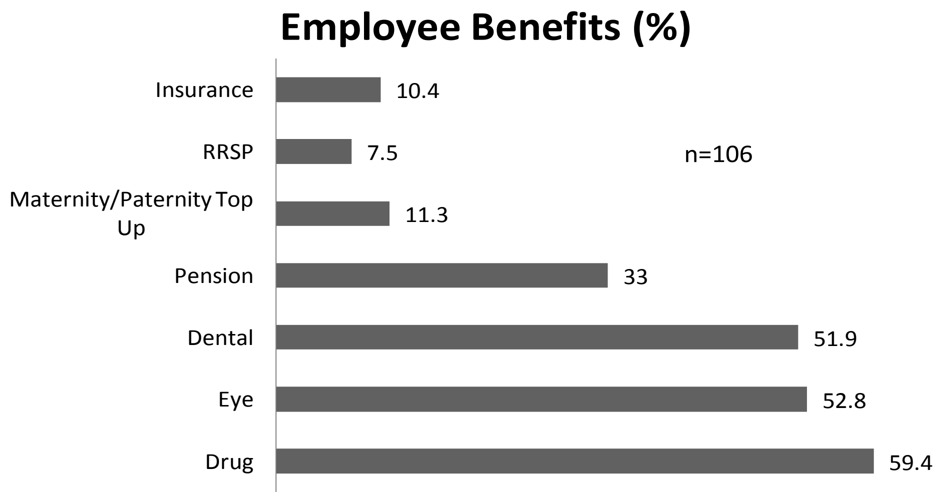
In 2010, over $57.6 million in wages was paid by the 87 responding social enterprises. If the 109 organizations surveyed represent 12% of social enterprises in Nova Scotia (see Research Design and Methodology above), we can estimate that social enterprises in Nova Scotia paid $480.6 million in wages and provided 13,018 full-time-equivalent jobs (based on a benchmark annual salary of $36,917)[1]. In addition to wages, employees of the responding social enterprises enjoy a high level of benefits. Over 57% of the 106 responding organizations provide drug plans and nearly all of those organizations (98%) also provide eye care and/or dental care benefits. Over 37% of employees of responding organizations receive pension plans and/or RRSP option benefits.

The 105 responding organizations have high ratios of female to male staff – on average 80% of an organization's staff are women and 25% of responding organizations indicated that they have no male employees. Additionally, on average 67% of an organization's staff (men and women) are over the age of 35 with 18.1% of respondents indicating that no employees were 35 years of age or under.

Table 1: Employment

	Number : (Mean) Range
Full-time (>30 hours per work)	(13.25) 0-200
Part-time (<30 hours per week)	(8.33) 0-138
Seasonal	(2.94) 0-35
Contract	(3.84) 0-125
Full-time volunteers	(10.27)0-102
Part-time volunteers	(22.92) 0-620

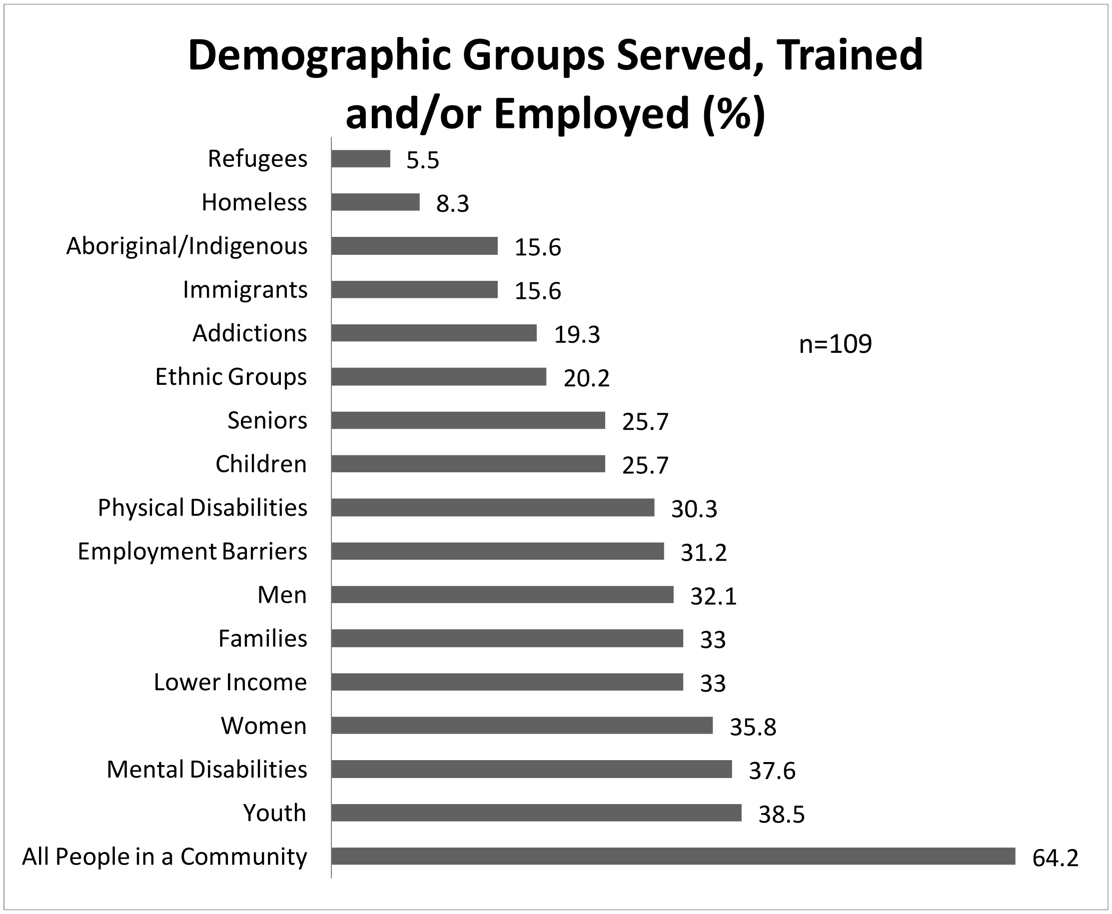
[1] Based on Statistics Canada 2006 Census, Nova Scotia had median earnings of $36,917 for full-year, full-time earners in 2005. (Statistics Canada, 2010)



Demographic Groups Served, Trained and/or Employed

By definition, social enterprises pursue multiple missions in their social and business operations. In this survey, 106 respondents indicated that at least 2,220 full-time, part-time and seasonal employees were employed as part of their social mission. Additionally, respondents provided training to 34,797 people and served at least 801,475.

The majority of responding social enterprises (64.2%) serve all people living in a their particular place or community followed by youth (38.5%) and people living with mental disabilities (37.6%), women (35.8%) and lower income individuals (33%). Social enterprises often serve multiple demographic groups; in this survey, 70.6% of respondents served, trained and/or employed at least two demographic groups.



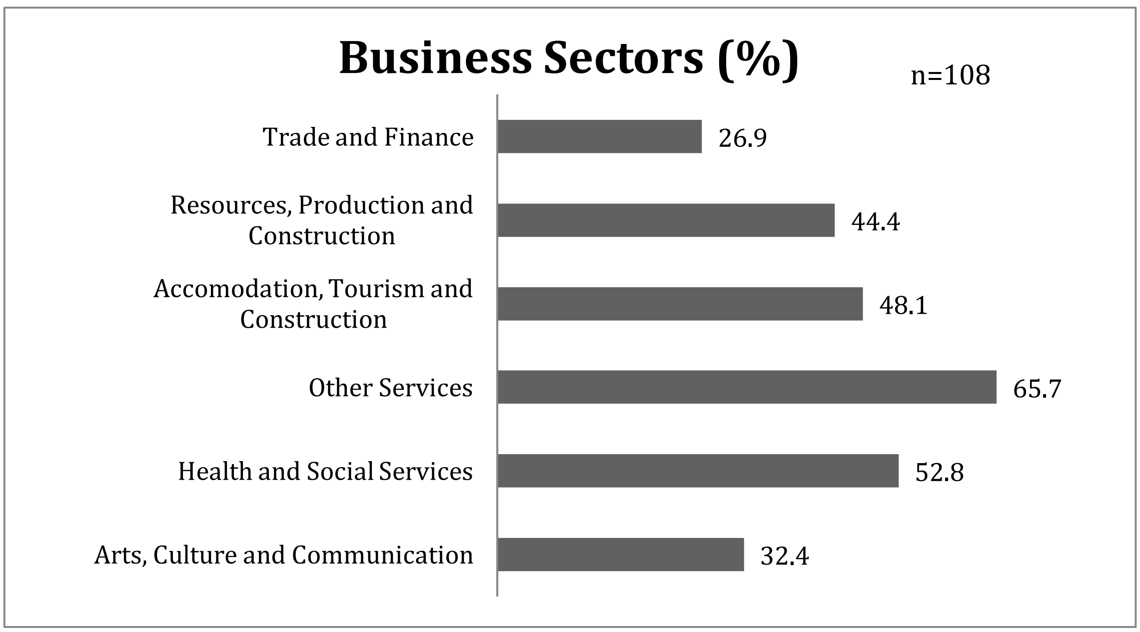
Geographic Area of Activity

The activities of the 107 responding social enterprises are highly localized. Most sell goods or services to their neighbourhood or local community (77.6%), followed by their city or town (67.3%) and their region (county or district) (57.9%). Many social enterprises (63.4%) serve multiple (two or more) geographic areas.

Of the 108 responding social enterprises with offices, 55 (50.9%) have their head offices located in the Halifax Regional Municipality (HRM). Of the 55 head offices in HRM, 39 of those indicated that they serve only their local and/or city and/or district population. Of the 20 organizations in Cape Breton, 9 (8.3%) are located in the Cape Breton Regional Municipality. In total, the urban areas of Nova Scotia (HRM and CBRM) account for over 59% of all responding social enterprises. The remaining organizations are distributed throughout rural Cape Breton (10.2%), Antigonish (7.4%) and other rural mainland communities (23.1%).

BUSINESS SECTORS

Social enterprises sell goods and services across a wide range of business sectors. Respondents identified a total of 44 business sectors (see Appendix A for detailed sector list) in which they sell goods or services. Those sectors are classified in broader categories, as shown in the chart below. At 38.9%, education is the predominant sector in the "Other Services" and the single largest sector across all categories. Health and Social Services, the second largest sector, includes day cares (20.4%), social services (17.6%) and employment (16.7%). Most responding social enterprises (77.8%) sell goods and services in multiple sectors (two or more of the broad sectors below).



REVENUE, FUNDING AND SURPLUS

In 2010, 88 responding social enterprises generated over $98.1 million in revenue, including sales, grants, loans and donations. After exclusions for errors and missing information (see Research Design and Methodology) the remaining 59 responses totaled over $63.2 million in sales revenue. For the 86 organizations that supplied both total revenue and expenses, calculations show a total net surplus of almost $11 million.

79 responding social enterprises in 2010 received over $18.3 million in grants, loans and donations. This total does not include the 20 organizations that indicated they receive some form of grants, loans and donations but did not provide the amount.

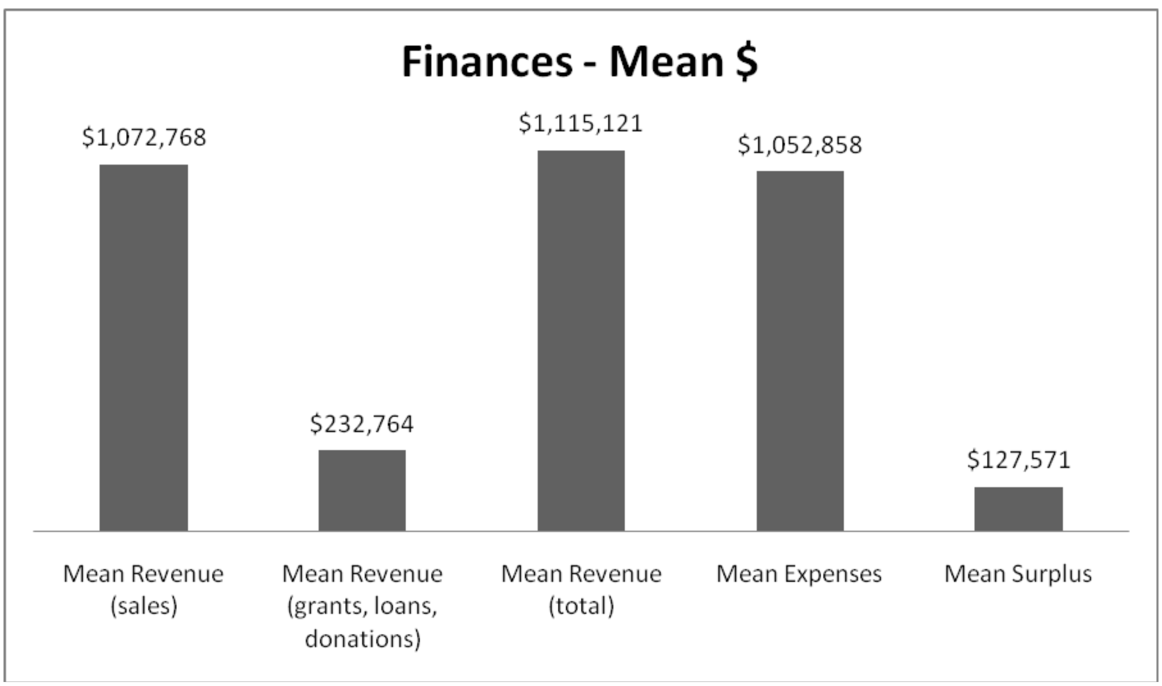
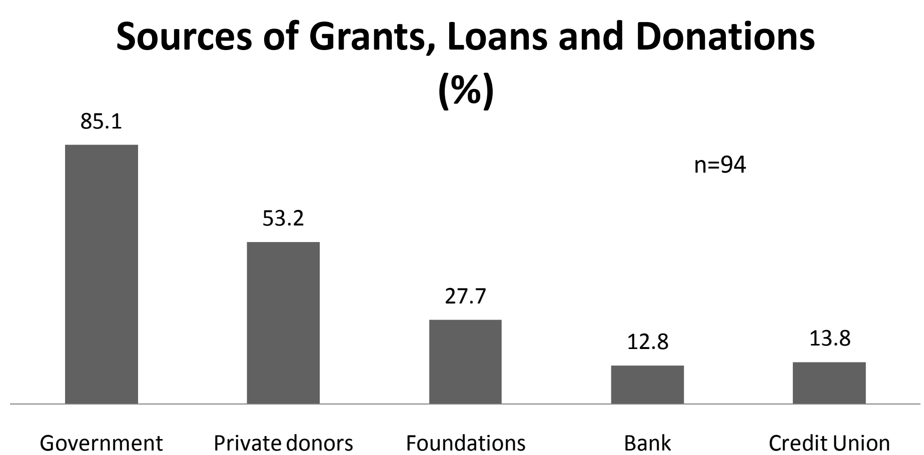


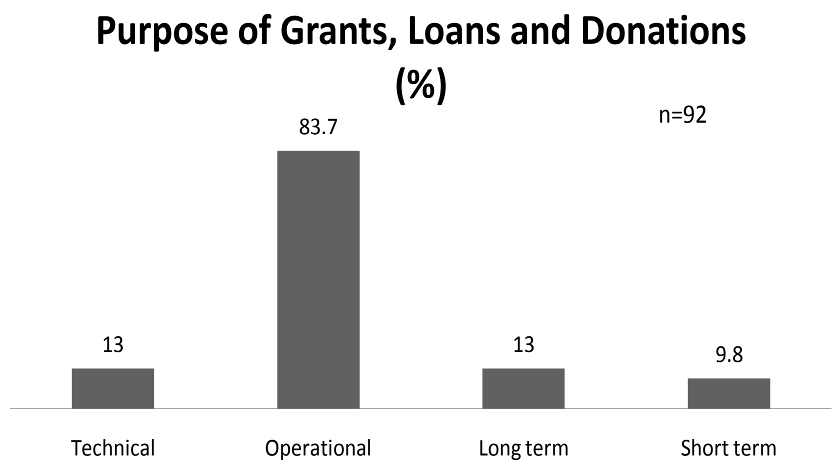
Table 2: Distribution of Social Enterprises by Revenue (n=88)

Total Revenue, 2010	Percent
$0-$10K	4.5%
$10,001-$50K	13.6%
$50,001-$100K	10.2%
$100,001-$500K	30.7%
$501-$1m	13.6%
$1,000,001-$5m	22.7%
$5m or more	4.5%

*Percentages total less than 100 due to rounding



Over 85% of responding social enterprises identified government funding as a source of grants, loans and donations for the surveyed organizations. Private individuals, philanthropists and donors were sources of funding for 53% of surveyed organizations. More than half (55.3%) of the responding organizations received grants, loans and donations from multiple sources. Operational grants were the primary purpose of securing grants, loans and donations for 92 responding organizations.



Opportunities and Challenges

The research study reveals a mature social enterprise sector in Nova Scotia, providing employment, training, goods and services in urban centres and rural communities. Based on the information obtained by this research study, we have confidently attested to the size, scope and impact of the social enterprise sector in Nova Scotia; with this in mind, we move on to examine the opportunities and challenges faced by social enterprises.

In the final section of the survey, respondents were asked to rank their top five supports used; development priorities to success. In all rankings, a clear winner emerged as the top opportunity or challenge, as perceived by responding practitioners in this sector. Weighting is shown in brackets with lower weights indicating a higher rank.

Responses to the top supports used and the top barriers to success show that talented staff and access to funding/financing are perceived as the key factors in a social enterprise's growth and success. Responding organizations identified talent retention and skilled staff as their most important support system, followed by an effective Board of Directors and government funding; clearly human resources are at the heart of these organizations but financial support is also needed. Organizations reiterated these priorities in their responses to the top three barriers to success – financial support (#1, accessing ongoing government funding and #3, financing) and human resources (#2, keeping/finding skilled staff) ranked in the top three. These outcomes are in line with other research findings; a 2003 Bank of England study found that the top barriers to growth for social enterprises were access to finance and lack of qualified staff. (Bank of England, 2003) Based on similar findings, Karaphillis, Asimakos and Moore (2010) concluded that social economy organizations need increased human resource capacity and access to financing.

In response to the survey question on their top development priorities, social enterprises identified raising awareness and demonstrating the value of community and social enterprise closely followed by expanding market opportunities. Development priorities determine how an organization will direct its limited resources and social enterprise organizations understand the importance of being valued by their communities and other stakeholders in order to grow and fulfill their missions. These responses also indicate that social enterprises see their future success as dependent on their ability to grow their current businesses.

Top Supports Used

1...Talent retention and skilled staff (310)

2...Effective Board of Directors (423)

3…Government funding (460)

4...Business management expertise (484)

5...Dedicated volunteers (637)

Top Barriers to Success

1…Accessing ongoing government funding (408)

2…Keeping/finding skilled staff (474)

3…Accessing financing (525)

4…Obtaining and keeping good board members (575)

5...Business management expertise (605)

Top Development Priorities

1…Raise awareness and demonstrate the value of community and social enterprise (450)

2…Expand market opportunities (495)

3…Identify and pursue partnership opportunities (577)

4…Enhance business skills of directors/supervisors (608)

5…Facilitate networking among stakeholders in the community and social enterprise sector (661) (this question was ranked only slightly higher than "Increase access to capital" at 664)

CONCLUSION

Based on the information collected from the 109 responding organizations, we can draw a picture of the social enterprise economy in Nova Scotia. We have summarized above the significant impact the social enterprise sector has on Nova Scotia's economy. We have also indicated that the sector plays a vital role in the delivery of goods and services that improve the welfare and quality of life for all Nova Scotians. We estimate that, based on our definition of social enterprise, there are between 769 and 930 social enterprises in Nova Scotia. Although our definition included several legal structures, most social enterprises surveyed are non-profits and registered charities. Responding organizations came from all over the province, nearly 50% being located in rural areas. Further evidence of the inherent multiplicity of social enterprises: most respondents sell goods and services in multiple business sectors and most serve multiple demographic groups. These organizations primarily pursue social missions but many are multi-purposed; meeting community needs vastly outweighs income generation as a priority for these organizations.

The findings of this survey show that social enterprises make an important economic contribution to the province. In 2010, the responding social enterprises generated over $98.1 million in revenue, including sales, grants, loans and donations and 86 organizations had a total net surplus of almost $11 million. The majority of social enterprises are medium-size organizations with revenues above $100,000 and on average employ 13 full-time workers. Based on survey responses, we estimate that the social enterprise sector in Nova Scotia paid $480 million in wages and provided 13,018 full-time-equivalent jobs (based on the benchmark Nova Scotia average annual salary of $36,917). In addition to wages, employees enjoy a high level of benefits such as drug plans and pension plans and/or RRSP options and, on average, these organizations also employ a high percentage of women and people over the age of 35.

Looking forward, responding social enterprises acknowledge that their capacity to attract and retain talented and skilled staff along with their ability to access funding and financing play a major role in the growth and success of their organizations. Social enterprises also recognize the need to enhance their profile and increase business opportunities as top development priorities. Support in these critical areas would enable social enterprises in Nova Scotia to expand on what this research study shows to be important social and economic contributions.

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APPENDIX A – BUSINESS SECTOR GROUPING

Broad Sector Grouping Based on Bouchard et al., 2008 (R- 2008-01)	Detailed sector description (from questionnaire)	Percentage of responding SE's active in this sector N=108
Resources, Production and Construction		**44.4**
	Agri ulture, forestry, fishing, mining	11.1
	Construction	5.6
	Food Production	15.7
	Printing and publishing	8.3
	Production and manufacturing	14.8
	Repair and maintenance	3.7
	Sewing	3.7
	Environment and animal protection	10.2
Trade and Finance		**26.9**
	Finance and insurance	0
	Retail sales	25.9
	Wholesale sales	9.3
Real Estate		**12.0**
	Housing (long term rental, assisted, etc.)	9.3
	Property Management	4.6
	Real Estate	0.9

Accommodation, tourism and food services		**48.1**
	Accommodation	4.6
	Food service/catering	20.4
	Food distribution	16.7
	Recreation	13.9
	Tourism	11.1
	Facilities (banquet, conference, party)	13.0
Health and Social Services		**52.8**
	Day care	20.4
	Employment	16.7
	Health care (incl. hospital, nursing, clinic, crisis care, addictions)	13.9
	Social services	17.6
	Emergency and relief	2.8
Arts, Culture and Communication		**32.4**
	Arts and culture	25.9
	Gallery/arts	12.0
	Theatre/performing arts	12.0
	Communications	13.0
Other Services		**65.7**
	Administrative services	4.6
	Consulting	6.5

	Education	38.9
	Janitorial/cleaning (including street cleaning)	3.7
	Landscaping/gardening	10.2
	Law, advocacy, politics	2.8
	Movers/hauling	0.9
	Personal services	9.3
	Professional services	13.0
	Public administration services	5.6
	Scientific/technical services	2.8
	Services for businesses	18.5
	Services to social enterprises, cooperatives, non-profits, charities and their employers	28.7
	Transportation and storage	0.9
	Waste management	8.3
Multisector (SE indicating that they sell goods or services in two or more of the above)		**77.8**

APPENDIX B – SURVEY ON COMMUNITY AND SOCIAL ENTERPRISE