

Development Wheel Project: CBO Survey Report for BC

Community Based Organization (CBO) Survey: "One Year Later"

This survey was directed at those workshop participants who completed a Next Steps Questionnaire at the end of the workshop. The Next Steps Questionnaire was completed only by those who decided they were ready to undertake social enterprise development. The questionnaire identified the next steps they needed to take.

The purpose of the "One Year Later" survey was to identify if in fact the organization had made efforts toward social enterprise development, and if so, what activities had been undertaken and how. We wanted to understand the types of activities, resources and challenges they face in this work. The survey also asked those who had not made progress, to tell us why.

These interviews were conducted starting in May 2007 through to January 2008. In the spring of 2007, we followed up with participants from workshops that had been held during the spring of 2006. Then during the fall of 2007 we followed up with participants from fall 2006 and spring 2007 workshops. The timing of the project has not allowed for follow-up with participants from workshops held after May of 2007.

This report includes references to the Fall 06 follow-up survey of CBO's¹, incorporates input from CBO Discussion Groups², and provides responses from the "One Year Later" survey. The conclusions represent findings related to CBO's engaged in SE Development from the BC component of the project overall. The Ontario survey findings are documented in a separate report.

Executive Summary

This survey, and the related surveys and discussion groups that engaged CBO's, is a representative snapshot of the scope of social enterprise development work being undertaken in BC, at this time. There are exceptions of course, and even among survey respondents (as a small sample size) we note where these occur. The findings support the experience of TA providers, and the observations of workshop facilitators who have been working with the project over the last few years.

First, we know that SE development is being undertaken primarily among non-profit organizations in the social services or employment/training fields. It is being undertaken by new, small organizations with no staff, and by very mature organizations with dozens of staff. In most cases, it is being undertaken by a single champion who does this work in addition to other program responsibilities.

¹ CBO Fall 06 summary report final, January 2007. 21 workshop participants surveyed out of a total of 32 who had complete Next Steps (65% response rate). Of these, 14 were in BC and 7 were in Ontario.

² June 2007 & January 2008: Involved 12 CBO's who either had started a SE, or were in the process of developing one. Notes on these discussions are available.

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Second, the organizations do not usually build staff/board/volunteer teams or working groups around their SE work. Other staff see the work as disconnected from their roles. If the survey is representative, we can say that only a third are strategically networking or building relationships outside the organization to support their SE development. Lack of staff time and resources for development work are among the most frequently cited challenges. It seems that in the workshops, and as a practice of good technical assistance, we need to do more to encourage champions to expand their support systems – both internally and externally.

The workshop and the workbook were rated high by all respondents, however one third had not used the workbook after the workshop. It is not clear why. Respondents cited lack of time as the primary reason for not using the resources. Likewise, none of the respondents had accessed the Hotlist of SE articles available free to them. This could be a factor of time again perhaps, or lack of understanding of how to use the articles, or --- it is not clear.

Three quarters of those who made progress had accessed free and/or paid services of either CCE or Fraser Valley Centre for Social Enterprise. The others used other paid advisors or none to date. Respondents were clear about the positive impacts of having a TA provider to help with work planning, connect them with others and provide more specific assistance such as writing grant proposals or feasibility studies. There are definite strengths to having some form of locally based TA available in an ongoing fashion: establishes relationships, can be informal when needed (eg: I need a pep talk), is cost effective and reduces isolation by connecting them with other resources.

Over 60% of those surveyed had used their own cash resources (or assets such as buildings) in their development work, and 89% had applied for grant funds of some kind. Enterprising Non-profits was the predominant grant source mentioned. Funding availability and the attitudes of some funders (who are not supportive of social enterprise) were challenges cited by some, while others focused on the need to create a more supportive environment within their communities and government. This supportive environment was linked to funding, but also to procurement policies and engagement of the private sector in this work.

This work requires tremendous organizational resources, as well as the ability to access and engage outside resources: both human and financial. One year after the workshop the majority of respondents were at least a year away from start-up of their SE; it requires this commitment of resources over a long period of time!

1. Who was interviewed: 23 respondents, 37% response rate

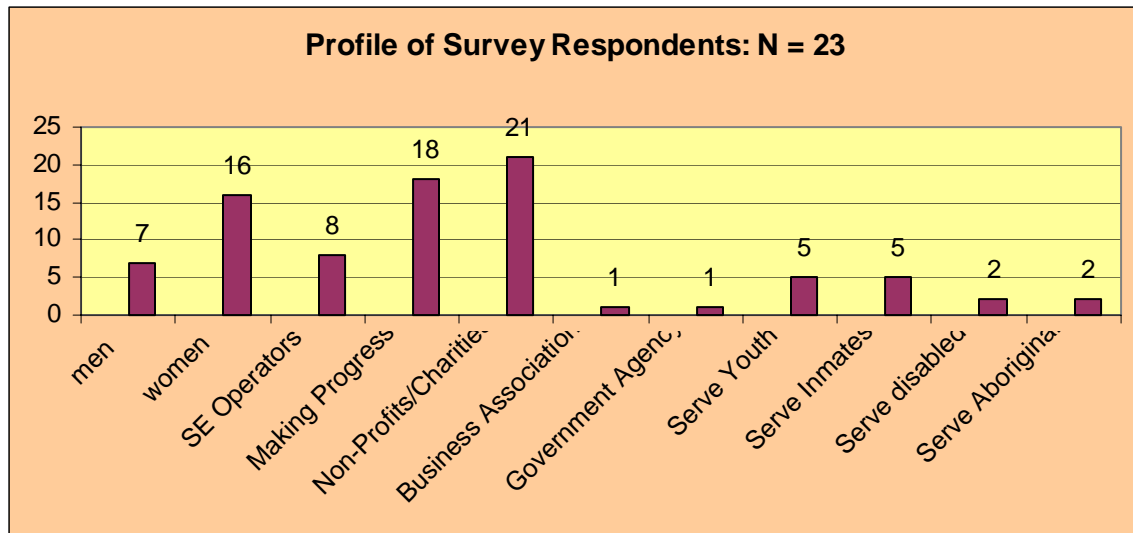
See the following table for a complete list of organizations, respondents, and status. In total, there were 9 community workshops delivered in BC between March 2006 and October 2007, with 213 participants. **This survey** covers a possible 63 respondents (who completed Next Steps Questionnaires) from 4 workshops between June 2006 and March 2007. 23 of these participants responded to a request for an interview, which is a 37% response rate.

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All but 4% (1) of the respondents were the primary champion of SE work within their organizations. 70% of those interviewed were women. All but 13% (3) of the respondents had attended the workshop.

Among the 23 organizations surveyed, 9% were urban, and 65% were from the Fraser Valley region, our only intermediary site. 91% of those interviewed were non-profits or charities, with a high proportion serving youth or inmates. This is representative of overall workshop attendance. As Table One, in appendix one, illustrates, the respondents also represent a full spectrum of organizational sizes and capacities.

35% of the organizations had an existing SE (or revenue generating division) prior to taking the workshop, and 78% of the organizations had taken some next steps since the workshop.



It is significant that the majority of those doing SE development work are women in the non-profit sector. These two features aside however, the survey respondents represent a good mix of types of services, size, locations and status of their SE work.

Those who had not made any progress since the workshop (22%) cited staffing changes (among champions) as the primary challenge, with 4% (1) who had decided SE was not needed at this time, and 4% who needed to re-consider their overall approach. (See Table One, Appendix One, for details.)

2. Who is supporting SE development from within the organization?

In addition to the SE champions who were interviewed, 52% of respondents identified that there was additional leadership for SE development within their organizations. Half of these identified a board or committee member(s) as contributing, while half identified another staff person. All respondents however, identified the need for additional staff

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and volunteer resources to do this work more effectively. 91% suggested that their boards were supportive in principle, but not actively engaged or able to take on any of the actual work. This leaves 9% of respondents who had very (formally) engaged staff teams and working groups supporting their SE efforts. In most of the other organizations the extent and nature of additional involvement seems to be primarily at an advisory (arms length) level, as opposed to an operational level.

Generally speaking, respondents were singularly championing this work as an add-on to their normal duties. Only SUCCESS (urban) and 2 existing SE's had dedicated business development or management staff focused solely on the SE work.

Only 35% of respondents indicated that they had engaged other (outside) stakeholders in some way. This usually involved consultations with clients, members, funders or other related organizations. Respondents indicated the following human resources involved in some way in their SE work:

Staff time: 83% indicated staff time being contributed; this is 100% of those with paid staff
Board time: 66% said the board was contributing
Other Volunteer: 17% (all but 1 of these organizations had no staff)

Generally speaking the SE development work is championed by a lone staff person or board volunteer, who both end up donating time to this work. Organizations have not taken the time to build teams around this work, either from within the organization, or through external volunteers/advisors. They say on one hand that the board is supportive, but on the other hand, that they are not active enough.

The majority have also not engaged other stakeholders. Those who had convened or otherwise engaged clients, funders or other stakeholders had very positive stories from these experiences. We know from the CBO Discussion Groups that if this effort is not made early on and throughout the process there are often later stage challenges with staff and/or boards who don't really understand the nature of the SE, the shift in culture and management style etc. This creates resistance and tension in the organization. CBO's also indicated that funders and donors can be very supportive IF they are engaged early on, but had stories of backlash when they had not done this work.

The DW workshop and workbook identify strategic networking and community participation as a key activity that should be considered at each phase of development. Given this lack of attention to that task, it could be that this is an area that should get more attention in the workshop, or/and during early stage counselling with CBO's.

3. Who is supporting the SE work from outside the organization?

In the Fall 2006 survey, 66% of respondents had accessed some form of outside expertise. This is consistent with these findings at 72% of those who made progress.

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FVCSE³: 64% of those making progress in the Fraser Valley region
Other Advisors: 64% of all those making progress (details below)

Note that some organizations accessed more than one source of outside expertise so the totals above exceed 72% of those making progress.

General Consultants:

- (7) CCE staff (Island & Okanagan)
- (3) David at Enterprising Non-Profits

Sector or Expertise Specific Consultants:

- Agrologist and related technical expertise
- Housing consultant: *High Ground*
- Local MBA student from Malaspina
- Food consultant: *Edible Strategies*

Other SE's:

- Pennylane staff
- SPARC

Other:

- Our MLA, Rick Thorpe
- Brandon Hughes, Rural Secretariat

4. What has the role of the Regional Intermediary been?

FVCSE: Fraser Valley Region (N=7)

In the Fall 2006 survey about 50% of respondents were uncertain about the role that the regional intermediary could play. This awareness has increased with only 4% suggesting they didn't know FVCSE could help them. This awareness however, also prevented several organizations from seeking help because they know FVCSE is not well funded – they did not want to ask until they could afford to pay. Those who did access FVCSE services rated them 4.5/5 and did so for the purpose of:

- 71% board presentations/workshops
- 57% grant application supports
- 29% feasibility study
- 14% concept papers

⁴CCE TA Services: Island & Okanagan Regions (N=7)

All of those surveyed in these regions took advantage of the free TA and some also access services through the pilot of the ENP Regional Coach system (a project activity). It could be that these individuals responded positively to the request for an interview

³ Fraser Valley Centre for Social Enterprise was the only dedicated regional site/intermediary in the project in BC: www.centreforsocialenterprise.com

⁴ Note that in the fall of 2006 the project "re-profiled" to address the loss of regional sites. This included CCE staff delivering workshops and providing TA in two target regions: Vancouver Island and the Okanagan Valley.

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because of the (positive) relationship they had with us already. These organizations accessed CCE services for the purpose of:

- 43% referrals to other advisors
- 43% work planning; getting focused on next steps; proposal review
- 29% specific clustering among retail outlets for supplier diversification
- 29% board presentations/workshops

All of those who accessed either free or paid TA services through the project have indicated high levels of satisfaction with that service. Respondents say it alleviates their isolation, helps them problem-solve, motivates them and links them with other resources.

The predominant role of regional intermediaries or advisors in BC has been around orienting boards, work planning and coaching, and support with funding applications. There are starting to be more later stage enterprise development tasks required, as indicated by the recent work on Feasibility studies by the FVCSE. CCE made quite a few referrals to other advisors, but this is partly due to our lack of physical presence in the target regions and our own efforts to identify and link with other consultants as one of the project objectives. This linking role has been important in the successful relationship between several retail SE's in the Okanagan, and among existing SE's in Victoria who are now meeting regularly since being introduced in a Discussion Group.

5. What financial resources have gone into the SE work to date?

Organizational Resources:

- 61% of respondents (making progress) organizations had contributed cash resources to their SE work
- 27% of the organizations surveyed in BC are using owned buildings or land as the basis for their SE development
- other respondents thought they might be contributing funds at later stages

Accessing Outside Resources:

- In the Fall of 2006, 66% of respondents identified the need for outside funds.
- In this survey, 89% of respondents making progress had applied for funds.
- This increase is likely due to these respondents being further along in their SE work and more realistic about what it takes.

42% received a grant: *ENP⁵ (7), Coast Capital, Aboriginal Housing, Aboriginal Business Canada, Corrections Services Canada, Community Living, Vancity*

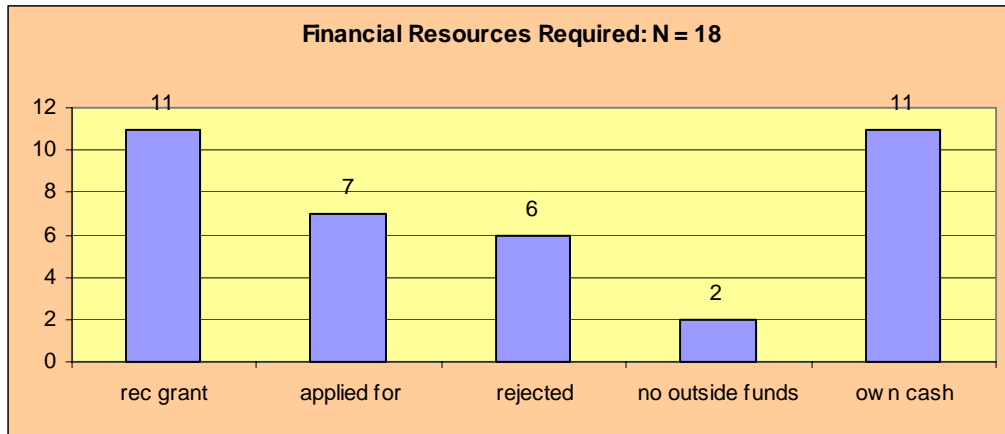
23% had an application rejected: *ENP (2), Centre for Sustainability (2), Vancity, Gaming, Foundations*

⁵ Enterprising Non-Profits: Funded by 9 organizations (including Vancity and Coast Capital) to promote and deliver grants for SE development among BC non-profits and charities. Maximum \$10,000; average is \$6,000; approximately \$300,000 granted in 2007.

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27% are waiting to hear:

ENP (5), BC Gaming (2), BC Housing, City of Nanaimo, HRSDC, United Way



The predominant funder at the SE development stage in BC is ENP. Several respondents had other sources of funds within their particular sector (aboriginal, people with disabilities or housing). Several respondents had been turned down initially and were in the process of re-applying (to ENP). Clearly this work requires additional resources that the majority of respondents don't seem to have. Only 11% of organizations making progress had not applied for any outside funding. They thought they would need to in the future.

6. What is the impact of project resources on SE development? (N=17)

Workshop: average rating of 4/5 for:

- affirmed direction/knowledge (6)
- increased understanding/language (5)
- gave us structure/resources (4)
- made us re-consider using SE right now (1)
- saw our potential to link with others/expand; we are less isolated now (1)

Workbook: average rating was 4/5 for:

- board/staff orientation/awareness (6)
- checklists (5)
- not used (5)
- used the legal chapter in ENP guide (1)⁶

E-bulletin: average rating of 3/5 among 7 users only

- haven't seen it (11)
- skim it only; no time

⁶ Remember that in BC during 2007, workshops were integrated with the ENP workshop so participants received both workbooks.

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- seems very intermittent
- keeps me in the loop

SE Hotlist: not used by any respondents

As we know from past surveys, and from the workshop evaluations, the workshop is very useful, even for those with existing SE's. The workbook is rated highly by those who have used it, however almost 30% of respondents did not refer to it after the workshop. Comments during CBO Discussion groups suggest that some groups have difficulty knowing how to use it, or transferring the workshop knowledge within their organizations. This could be one reason that so many of those accessing TA services request a board orientation, and it also suggests that more attention needs to be given to discussing and committing to SE within the whole of each organization. In 1 organization the workbook is circulated among staff and in such demand they have printed additional copies, but this is not typical. Most organizations suggest that outside of the SE champion, other staff don't have the time or the inclination; they see the SE work as a singular project and don't connect it with their role in the organization.

The e-bulletin obviously did not reach many participants, which suggests a break down in our internal data systems. While the hot-lists were always referenced during workshops, it is clear that participants did not understand what these were, or what use they might be to their particular situation. Generally, there is not a strong practice of researching other (related) SE's among the CBO's that we have worked with, unless it is a referral or connection that the TA provider facilitates. This finding also reinforces that, while there may be resources available, we need to do a better job of promoting them and helping people "pathfind" their way to them.

7. What are the Next Steps for these organizations?

The Fall 2006 survey was conducted approximately 5-6 months after workshop participation. Key tasks at that time were related to planning, establishing work groups and applying for funding. Most of those groups were at phase 1, or perhaps early phase 2 in terms of the initial readiness and development activities they were undertaking.

Of interest at this "one year later" juncture, is that many more respondents are moving into later phases – some through to business planning (phase 4) or start-up activities. Others are focused predominantly at the feasibility stage (phase 3). Of the 18 respondents who made progress, 11% are starting up their SE and 11% are existing SE's looking at expansion. Seeking funds remains a priority focus for many groups.

Also of interest, is that many champions are only now seeing the need to engage their boards at a deeper level, or to build support more broadly in their own communities/organizations. Some are just now identifying strategic networking or engagement tasks.

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The table in Appendix Two provides details of tasks anticipated over the next year for each organization and identifies the overall phase of development from the Development Wheel. The following table summarizes those detailed responses.

Activities Planned for 2008 (N= 18)	
Organizational Development	<ul style="list-style-type: none"> • Board development, planning, staff or advisory leadership development (5) • Promotions materials, events, etc. (2) • Add to technology capacity for the centre (SE) (1) • Structuring a foundation to flow profits into (1)
Enterprise Development	<ul style="list-style-type: none"> • Feasibility studies (8) • Funding applications & operating capital (3) • Expand existing SE's (suppliers and marketing) (2) • Business plan/legal structure (1) • Training and testing our product and sales skills (1)
Community Participation and Strategic Networking	<ul style="list-style-type: none"> • Increase partnerships for business/mentoring (3) • Engage community & clients more (2) • Start or continue discussions with funders (2) • Ongoing community communications (2) • Convene sectoral discussion about minimum wage issue (1) • Coaching from another SE in similar field (2) related to enterprise dev.
Other Types of Activities	<ul style="list-style-type: none"> • Renovations completed this fall (1) • Carry on our existing SE, while we complete business plan for new one (1)

Of the 18 who made progress since the workshop, only 17% were still in early stages of exploring ideas and organizational development. 61% of respondents plan to engage in a range of activities largely focused on phases 3 and 4 (feasibility and business planning). 22% are in start-up phase of a new SE or expansion of an existing SE. It is clear that this work takes a year at least, and in most cases longer.

Given what we know about the (singular) leadership for SE within most of these organizations, it is positive to hear so many identifying participation and networking tasks, however there are still fewer giving attention to these tasks than we would like to see. Those who have spent time on these tasks tend to have a supportive network around them (either a formal committee or informally via funders, other SE's or other staff) or at least know that they can find support/resources when they need them.

The loss of, or change in, internal champions was the greatest factor contributing to either no progress, or to delays in making progress during the last year, with lack of funding as the second most significant factor here.

8. What challenges are these organizations facing in their SE work?

Internal Environment and Capacity

Lack of resources:

- Funds are available for start-up but not for the development work; need funding (4)
- I can't do it alone, need funds to hire consultant.

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- Lack of time: always other things on the plate; sustaining the attention over long term knowing it isn't going to move as fast as we might like but that's okay (4)
- We could use one more staff person who is specifically dedicated to the development of our social enterprise projects. Presently we have a small group with busy, busy jobs in addition to the social enterprise projects we have initiated.
- Lost our staff champion and need to replace that role.

The right knowledge/skills:

- If you do social enterprise without a plan, you plan to fail. You don't make money for the first several years. Commitment, you have to be committed to getting clearer about your business ideas; Finding an idea that fits with markets, our expertise and potential partners. (2)
- I have unique skills for this project (housing) but could not have stayed the course without those.
- Working with high-risk youth who are being employed, especially in this job market. We need someone with that background up front to work with them; I put in an average of 30 hours a month in volunteer time – that's not sustainable.
- I feel alone and carrying most of the work load, but also want to see it through and control my vision.

Role of the board

- Board engagement – they love the idea but have no time to help; Lack of movement from idea buy-in to action – we need paid staff to do this work; I feel like I am scolding my board all the time to take on some of these tasks – I am burning out. (3)
- Not sure if it is a question of understanding the mechanics to do the work, or one of apathy, but either way we are left doing this work alone.

External Environment: Supportive Policy

Funder knowledge, support and policy

- Educating funders about the mission and concepts of conservation – they have no idea; Buy-in from funders – everyone wants to see someone at the table, but no one will step-up first (3) (See also first bullet in previous section: internal challenges)
- Adaptation of SE model to the specific sheltered workshop model we are using now; The complexity of relationships between funder, our service delivery and how they might perceive the move to a more profit orientation.

Public Policy

- There has to be a more supportive political/economic environment. Targeting government procurement, and other areas all need attention. (3)
- In the community living sector there is short sightedness in relation to minimum wage issue. The income is a secondary benefit for our members – after engagement, being productive, and in community.

Community perceptions and support

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- Increasing capacity in the community to support this work.
- Along with this are questions about reputation: who are we in the community, a competitor? What if it doesn't work?

Enterprise Development:

- Definition of SE – are all farmers' markets SE's because they charge booth fees, or does there have to be an added business such as e-commerce or market café?
- Finding a good location.
- Can we secure enough product to secure the ongoing viability of our organization? We are too dependent on a few suppliers and we need to expand suppliers if we want to grow.

The lack of funding, staff time, expertise and a supportive public policy environment are the most significant challenges named by respondents. This feedback supports what we know from CBO and TA Provider Discussion Groups, namely that we need to work simultaneously to strengthen both the demand side (through public policy on procurement and finance for example) and the supply side (strengthening the quality of SE's through accessible and quality TA and resources) of the SE field.

While there are provincial level organizations giving leadership to advancing policy, those at the grassroots level are largely unconnected and/or unaware of these efforts. The policy discussions and implications don't, or have not yet, trickled down to local level impacts. Strengthening the connectivity within the field in order to broaden the base of support for policy initiatives and engage SE's in efforts within their own regions could have significant impact.

One aspect of the "expertise" challenge for CBO's is related to the lack of networks among SE's themselves – either within a sector or within a geographic region – and thus their lack of feedback, shared resources and solutions to problems. The experience in the project is largely that the TA provider plays a significant role in brokering or referring these (and other) links and networks for CBOs. Another aspect of this issue is related to the need CBO's identify to increase understanding and support within their own organizations through a team of advisors/supports (both staff and volunteers). The implication of this could be that more attention needs to be paid to initial organizational development tasks, both during workshops and during the TA process.

Increased connectivity – for specific purposes such as learning, sharing resources and advancing awareness and policy – seems to be directly linked to our ability to strengthen accessibility and quality of both TA and other resources.

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APPENDIX ONE:

TABLE ONE: LIST OF BC RESPONDENTS

Grey is Vancouver; White is Fraser Valley region; Blue is Island; Yellow is Okanagan

Organization & Respondent	Type & Size of Organization (includes pre-existing SE's)	SE Progress & Status	TA Services
SUCCESS (urban) Bus. Dev. Manager: Bill Beatty bbeatty@success.bc.ca	<ul style="list-style-type: none"> Multi-cultural services \$1 million +, many staff Operate Several SE's 	<ul style="list-style-type: none"> Made Progress Exploring new SEs 	<ul style="list-style-type: none"> Consultation FVCSE
Mission Chamber of Commerce Manager: Bob Thomas (no longer there)	<ul style="list-style-type: none"> Business Association 2 staff 	<ul style="list-style-type: none"> NO progress Couldn't get support of board 	<ul style="list-style-type: none"> No
Abb. Farm & Country Market Manager: Bruce Fatkin fatkin@shaw.ca	<ul style="list-style-type: none"> Farm Market 1 part-time contractor Operate SE: Farm Market 	<ul style="list-style-type: none"> Made Progress Revenue options ENP grant 	<ul style="list-style-type: none"> Counselling FVCSE
John Howard Society Executive Director: Constance Vince jhsfv@shaw.ca	<ul style="list-style-type: none"> Inmates 2 staff 	<ul style="list-style-type: none"> Made Progress Feasibility ENP grant 	<ul style="list-style-type: none"> Counselling & Feasibility FVCSE
Chill. Comm. Services Manager: John Stellingwerf stellingwerffj@comserv.bc.ca	<ul style="list-style-type: none"> Social services \$3.6 million, 80 staff, 250 volunteers 	<ul style="list-style-type: none"> NO progress No reason to – very stable – not useful 	<ul style="list-style-type: none"> Check-in only FVCSE
CRISS Executive Director (vol.): Kate Collins kate_collins@shaw.ca	<ul style="list-style-type: none"> Inmates 0 staff 	<ul style="list-style-type: none"> Made Progress Funding for feasibility obtained 	<ul style="list-style-type: none"> Grant app. & partner dev. FVCSE
Sunshine Valley Rate Payers Board Member: Kate Zabell kzabell@telus.net	<ul style="list-style-type: none"> Community Development 0 staff 	<ul style="list-style-type: none"> Made Progress Community tourism 	<ul style="list-style-type: none"> Board Workshop FVCSE
Chilliwack Hospice Program Director & ED: Lucy Fraser lucy@chilliwackhospice.org	<ul style="list-style-type: none"> Care for the dying 2 staff plus volunteers 	<ul style="list-style-type: none"> NO progress Still 1 year away – focused on housing unit now & new ED 	<ul style="list-style-type: none"> No
Spirit Bear Society Executive Director (vol.): Lynn Ned lned@shaw.ca	<ul style="list-style-type: none"> Aboriginal youth; Housing 0 staff 	<ul style="list-style-type: none"> Made Progress House completed; SE ideas next 	<ul style="list-style-type: none"> Counselling FVCSE
FV Womens Resources Executive Director (new): Pam Willis pamw@wrsfv.ca	<ul style="list-style-type: none"> Women's services 55 staff, 60 volunteers Operate SE: Fronya Clothing Store: consign 	<ul style="list-style-type: none"> Made Progress Exploring ideas for a 2nd SE 	<ul style="list-style-type: none"> Counselling FVCSE
CORCAN BC Region (fed gov) Regional Director: Sandra Thiessen ThiessenSE@CSC-SCC.GC.CA	<ul style="list-style-type: none"> Inmates training and employment \$5 million, 33 staff Operate SE: Street cleaner parts, ceramics, auto parts contracts for inmates– break even – goal is rehab/skills 	<ul style="list-style-type: none"> Made Progress Exploring new, higher visibility SE's 	<ul style="list-style-type: none"> No
M2/W2 Resorative Christian Ministries ED (new): Wayne Northey northey@m2w2.com	<ul style="list-style-type: none"> Inmates 11 staff (includes Kamloops office) Operate SE: Hidden Treasures Thrift Store 	<ul style="list-style-type: none"> NO progress New ED didn't attend workshop; there is interest in 2nd SE. 	<ul style="list-style-type: none"> Not ready yet, but later.
Langley Association for	<ul style="list-style-type: none"> Disabilities 	<ul style="list-style-type: none"> Made Progress 	<ul style="list-style-type: none"> Counselling &

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Community Living ED: Dan Collins dcollinslacl@shaw.ca	<ul style="list-style-type: none"> • \$8.5 million, 160 staff 	<ul style="list-style-type: none"> • Business planning • ENP grant; 2nd grant rejected 	<ul style="list-style-type: none"> • Feasibility • FVCSE
Pleasant View Housing Society Administrator: Judith Ray jray@pvhs.ca	<ul style="list-style-type: none"> • Adult care facility (health) & Sr. housing • \$1 million approximately, 30-50 staff • Operate SE: Contract admin & financial service for NFPs 	<ul style="list-style-type: none"> • Made Progress • Exploring new idea for 2nd SE. 	<ul style="list-style-type: none"> • Board Workshop • FVCSE
Mountain View Conservation Society Director of Dev. Malcolm Weatherstone malcolmw@shaw.ca	<ul style="list-style-type: none"> • Wildlife conservation & education • \$100,000, 18 staff 	<ul style="list-style-type: none"> • Made Progress • Fund raising for centre • ENP grant rejected 	<ul style="list-style-type: none"> • Funding & proposal review • FVCSE
Greater Victoria Community Services Council (urban) Communications Manager: Christina Peacock Christina@communitycouncil.ca	<ul style="list-style-type: none"> • Social Planning & Research • \$700,000, 12 FTE plus 20-30 students/contracts 	<ul style="list-style-type: none"> • Made Progress • SE start-up phase • ENP grant 	<ul style="list-style-type: none"> • work planning session • CCE
Nanaimo John Howard Society Program Director: France Tellier France.jhsnan@shawcable.ca	<ul style="list-style-type: none"> • Inmates; mental health • \$800,000, 10 staff • Own house 	<ul style="list-style-type: none"> • Made Progress • At feasibility stage • 2 ENP grants 	<ul style="list-style-type: none"> • Referrals, counselling, proposal review • CCE
Aboriginal Educational Agricultural Society Program Manager: Leslie Dale Lesley@fnala.com	<ul style="list-style-type: none"> • Aboriginal; Youth; Greenhouse • Own the land – training bus. 	<ul style="list-style-type: none"> • Made Progress • Greenhouse site prep & research 	<ul style="list-style-type: none"> • No • In Kamloops, attended FV workshop
Shuswap Family Resources Society ED: Caroline Johnstone caroline_johnson@familyresources.bc.ca	<ul style="list-style-type: none"> • Children & families services • 15 + staff • 1 million + budget 	<ul style="list-style-type: none"> • Made Progress • Use building for SE 	<ul style="list-style-type: none"> • ENP application & coaching
Penticton Community Living Society ED: Kim Lyster kplyster@vip.net	<ul style="list-style-type: none"> • Disabilities • 2 million budget 	<ul style="list-style-type: none"> • Made Progress • Considering options 	<ul style="list-style-type: none"> • ENP application, coaching & referred to policy & TA
Kelowna Positive Living Society ED: Karen Alexander klalexander@lprc.ca	<ul style="list-style-type: none"> • Youth Services 	<ul style="list-style-type: none"> • NO progress • Want funds – SE not suitable 	<ul style="list-style-type: none"> • No
Summerland Asset Dev. Initiative (non-profit) Business Manager: Erin Harbor summerlandpennylane@shawbiz.ca	<ul style="list-style-type: none"> • Youth Services • Close to half million revenue; 15 (youth) staff • Operate SE: Summerland Pennylane retail discount 	<ul style="list-style-type: none"> • Made Progress • Expansion of supplier base, 2nd store, Foundation – all underway. • ENP grant 	<ul style="list-style-type: none"> • Counselling & partnership dev. • CCE
Whitevalley Community Resources ED: Gay Jewitt gjewitt@cablelan.net	<ul style="list-style-type: none"> • Youth Services • Operate SE: 2 Gether 4 Youth retail discount and training business 	<ul style="list-style-type: none"> • Made Progress • Growth in sales – through supplier diversification & marketing • ENP grant 	<ul style="list-style-type: none"> • Counselling & referrals • CCE

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APPENDIX TWO:

TABLE TWO: NEXT STEPS FOR SE DEVELOPMENT BY ORGANIZATION AND TYPE OF ACTIVITY

Organizational Next Steps Reported in January 2008 and the Phases of Development			
Organization & Phase	Organizational Development	Enterprise Development	Participation & Strategic Networking
Pennylane: expansion	Structuring the foundation. We have a board member connected to Vancity. There is a lawyer in the community who has done this as well.	Linking with other suppliers who understand social enterprise	Strengthen partners in the private sector
2Gether 4 Youth: expansion		Marketing push but there is only a limited market. How to draw clients from other communities? Advertising budget is 400 month. We are getting clearer on how we tell the story of our SE, it is the most effective sales tool.	Marketing – we need a mentor, marketing would have been one area we need more help in, we need to find someone in the community
Victoria Community Council: start-up	Ongoing work to engage & get input from staff; Do promotions package	Hire SPARC to train us in their model; test this structure on 2 negotiations for contracts: TEST if our staff can do the sales.	Increase partnerships for business
SUCCESS	FVCSE to meet with SE committee re: risk management	Done with concept development – move to feasibility & operationalizing	Get staff engaged in communicating SE activity to clients
Nanaimo John Howard		Complete feasibility on 2 ideas & continue (pre-feasibility) research into pewter production.	Formalize private sectors partners & continue to communicate with funders and other supporters.
Abb. Farm & Country Market		Complete venture selection with board & do feasibility study	
John Howard Society	Board strategic planning & strike SE Committee	Complete feasibility & then business plan	Gather information & network as per feasibility
Continued Reintegration & Support Society	Re-apply for funding & look for other sources	Feasibility	
Sunshine Valley Rate Payers	Complete enp & gaming applications	Market research & marketing plan	
FV Womens Resources	NOTE: this group uses own resources to date & has never done formal bus. Plans – ED drives idea to launch	Collaboration with Corrections Canada; considering doggie day care & purchase of cafe	No formal task identified but stressed that relationship building is key to their success
Spirit Bear Society	Finish renovations; FVCSE to talk to board; get them engaged	Develop farming & gallery plans	Outreach into FN communities; pursue partnership with school dist.
CORCAN		Start new SE's & expand existing	Increase partnerships

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Langley Community Living	Secure temporary SE champion, then recruit permanent.	Complete business plan for three ventures. Create legal structure (co-op). Business launch.	Convene sectoral discussion about minimum wage issue.
Pleasant View Housing		Complete wound care business case; Continue fee for service admin. enterprise	
Mountain View Conservation	Adding to tech capacity, program development – keep improving, re-organize education centre	Get funds to operationalize & ongoing development (new vehicle, etc.)	Continue to attend community events; Recruit more volunteers. Hold more onsite events.
Penticton Community Living	Talk with staff and interested members of the board with a clear focus on the potential changes	Do feasibility study	Test business ideas with the funder and how it feeds in to the Community Living BC. It depends on the risk they perceive.
Shuswap Family Resource	Not sure	Just to find out what we can do with this building	
Abor. Educ. Agricultural Society		Feasibility, business plan & launch	Continue community communications