



Mapping the Social Economy in British Columbia and Alberta

Final Report

Dr. Mike Gismondi, Athabasca University
Dr. Lynda Ross, Athabasca University
Juanita Marois, Athabasca University
Dr. Julia Affolderbach, University of Luxembourg
Lena Soots Centre for Sustainable Community Development, SFU
Ashley Smith, Simon Fraser University

April, 2013

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For further information, contact the BC-Alberta Social Economy Research Alliance, c/o Research Centre, Athabasca University, 1 University Drive, Athabasca, AB, T9S 3A3

Tel: 780-675-6494

Website: www.balta-sis.ca

Email: swulff@athabascau.ca

Author Information

Mike Gismondi is a Professor of Sociology and Global Studies at Athabasca University, a member of the BALTA Steering Committee, and Lead Researcher on the Mapping and Portraiture Project. The Mapping and Portraiture Team was comprised of talented researchers and writers including Juanita Marois, Dr. Lynda Ross, Dr. Julia Affolderbach, Lena Soots and Ashley Smith.

This report has been produced as part of the research program of the BC-Alberta Social Economy Research Alliance (BALTA). Financial support from the Social Sciences and Humanities Research Council of Canada (SSHRC) is gratefully acknowledged.



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Research Council of Canada

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Canada

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Introduction

This report is about the social economy. Considering that organizations generally defined as part of the social economy (the non-profit sector, non-governmental organizations, voluntary organizations, civil society, the third sector, and more) have been around for well over 100 years, it would be inaccurate to characterize the social economy as an “emerging sector.” Cooperatives and credit unions have played a critical role in the development of communities in Canada since the first half of the 20th century, although their usage has been localized in particular regions. Certainly, there has been extensive study, both academic and practice oriented. But it was not until the mid-1990s that the term “social economy” began to be commonly used, firstly in Quebec, the province now leading the country in its development of the social economy. Perhaps what is emerging today is a clearer conceptualization and understanding of the social economy as a sector. And, as a result, the social economy is taking a more prominent role in the minds of people and communities seeking a more just society.

The BC-Alberta Social Economy Research Alliance (BALTA) was initially started as a 5 year project in March 2006 funded by the Social Sciences and Humanities Research Council of Canada, and then later extended to 2012. The purpose of this alliance was to build a better understanding of the social economy sector in Alberta and BC. The Mapping and Portraiture team, in particular, implemented a survey to better describe the size and scope of the social economy in these provinces. Development of the mapping program began in September 2006, and the survey was launched in January 2008.

The National Survey of Non-Profit and Voluntary Organizations

In 2003, Imagine Canada collaborated in the National Survey of Nonprofit and Voluntary Organizations (NSNVO) across Canada. This study provided a national portrait of some key aspects of the voluntary and non-profit sector that is worth reviewing here:

- There are an estimated 165,000 nonprofits and charities in Canada.
- Half of these (54%) are run entirely by volunteers.
- 2 million people are employed by these organizations representing 11.1% of the economically active population.
- The sector represents \$106 billion or 7.1% of the GDP (that is larger than the automotive or manufacturing industries sector).
- Smaller provinces have a higher number of organizations relative to their populations.
- The top 1% of organizations command 60% of all revenue.

Soon after, Imagine Canada released specific data for Alberta and BC. The NSNVO fact sheets provided two sets of data for revenue and employee numbers: one that includes and one that excludes hospitals, universities, and colleges. The BALTA survey also excluded hospitals, universities and colleges. Unlike the NSNVO study, we also excluded sports and recreation clubs or societies, and religious organizations (unless they were involved in the marketplace operating, for example, a social enterprise).

Alberta

There are 19,000 NFP organizations in Alberta (12 percent of Canada).

- These organizations employ 175,000 employees (but 54 percent of NFPs do not have paid staff).
- These 175,000 employees work across 8740 organizations.
 - Hospitals, Universities and Colleges make up 1% of Alberta organizations but employ 40 percent of paid staff.
 - If we remove them, some 105,000 employees work for 8550 organizations.
 - But also 64 percent of that 105,000 employees work for 5 percent of the non-profits.
 - This means that 62,700 were employed in 856 organizations, and 23,100 were employed across the remaining 7000.

Similar patterns occur for revenue.

- Sector generates \$10 billion revenue.

- This compares favorably with other sectors: Industrial machinery \$9.1 billion; Agri-foods generates approximately \$12.7 billion; and Energy 22.5 billion [2010];
- Hospitals, universities and colleges account for 11 percent of total revenues.
 - 4 in ten NFP (43% percent) earn less than \$30,000.

The sources of revenue reported were government grants 33%, user fees or earned income 49%, and fundraising 18%. When we exclude hospitals, universities and colleges, earned income for the remaining NFP organizations goes up to 51%.

Major areas of activity reported in the NSNVO survey included sports and recreation 26%, religion 19%, grantmaking, fundraising, voluntary promotion 11%, and arts and cultures 10%.

British Columbia

- There are 20,000 NFP organizations in British Columbia, or 13% percent of Canadian total.
- They employ 147,000 staff; 114,000 when hospitals, universities and colleges are excluded.
 - 44 percent of total organizations (those with less than \$30,000 annual revenue) employ only 2 percent of all NFP staff.
- Sector generated annual revenues of \$11 billion; \$9 billion when hospitals, universities and colleges are excluded
 - 46% of income came from government; 34% from earned income;
- Areas of activity reported were religious organizations 19%; sports and recreation 17% percent; arts and culture 10%; and social services 9%.

Sousa and Hamdon, (2008) combined this data for the two provinces from *Highlights of the National Survey of Non-profit and Voluntary Organizations (Imagine Canada, 2005)*, other government studies, and various reports by non-government organizations to establish a preliminary profile of the size and scope of the sector in BC and Alberta. They identified the still important roles for non-profit and voluntary organizations and co-operative businesses in employment and revenue generation, in non-market housing, in social enterprise, and in providing local and regional social services. They also identified financial and other intermediary groups that sustain the social economy. In particular, their work acknowledged the significant presence of the co-operative model in western Canada and its role in the consumer, energy, farming, housing, and non-financial services, alongside strong financial co-

operatives and credit unions. As well, they identified a number of philanthropic and enterprise support organizations.

The BALTA Mapping survey was launched shortly after this preliminary study. Our findings confirmed the continued importance of the sector not only to the provinces' economic well-being, but also to the well-being of their people and communities. While our findings are limited by the scope of organizations responding to the survey, important information has emerged. The BALTA mapping project offers a more nuanced examination of the sector based on a sample of organizations reflected within the overall population.

It is important, however, to keep in mind a number of qualifications. When we review total employment numbers or revenue reported from our survey and compare them to the National survey for BC and AB, it is clear that many organizations in BC and AB did not report in. And even among those who completed our survey, many did not provide revenue or employment numbers. For example, the responding social economy organizations in Alberta and BC reported more than \$2.62 billion in revenue (Imagine Canada reported approximately \$18 billion total revenue [\$9 billion in each province after hospitals, universities and colleges were excluded]). BALTA's revenue figure included \$2.09 billion earned through sales of goods and services (Imagine Canada reported \$3.5 billion (BC) and \$4.6 billion (AB) earned in the market). The BALTA survey respondents reported that their social economy organizations generated more than 12,000 jobs (Imagine Canada reported approximately 220,000 across both provinces). So, while the numbers we discovered are large and interesting, the BALTA survey numbers seriously under-report totals for the social economy sector in the two provinces. Our totals are only from those organizations that responded to our survey, and thus provide an incomplete picture of the overall social economy sector.

That said, they do confirm the national patterns. BALTA mapping found that social economy organizations participated in diverse activities from basic needs provision to sustainability, arts and culture, fair trade, employment, and resource management. The majority provided services in their own neighbourhoods (AB 25% and BC 33%), city/town (AB 41% and BC 46%), and regions (AB 48% and BC 51%), but many others worked in the national (AB 13% and BC 14%) and international (AB 8% and BC 9%) communities. More importantly, this BALTA Mapping Report provides a more nuanced understanding of the social economy with regard to market activity, leadership and gender,

employment of target groups, mission and sector, and details of revenue generating activities and employment. In this sense, it provides some insights into other aspects of organizational practice that will be useful to researchers and practitioners.

Defining the Social Economy

One major challenge of portraying the social economy in Canada is that no universal or commonly accepted definition exists as to what and who constitutes the social economy, nor do actors necessarily self-define as members. A growing field, its analysts offer various definitions that attempt to capture the essence of the sector through their own lens. For example, Social Development Canada (2005) defines the social economy as a “grass-roots entrepreneurial, not-for-profit sector, based on democratic values, that seeks to enhance the social, economic, and environmental conditions of communities, often with a focus on their disadvantaged members.” Western Economic Diversification Canada (2007) defines the social economy as “An entrepreneurial, not for profit sector that seeks to enhance the social, economic and environmental conditions of communities.” Similarly, Economic Development Canada (quoted in Canadian Co-operative Association, 2005) describes the sector as one that “produces goods and services within the context of the market economy, but whose aim is to redistribute surplus in support of social and community objectives.”

For the purposes of the BALTA project in general and BALTA mapping in particular, Lewis (2006) uses Restakis (2005) and Pearce (2003) as a point of departure for defining the social economy. Restakis (2005) provides the following definition: “Social economy organizations are those organizations whose members are animated by the principle of reciprocity for the pursuit of mutual economic or social goals, often through the control of social capital” (p. 12). This definition includes all cooperatives, credit unions, nonprofits and volunteer organizations, charities and foundations, service associations, community enterprises and social enterprises that use market mechanisms to pursue explicit social objectives. For profit enterprises are included only if surpluses are mutually shared by members in a collectively owned structure such as in cooperatives or collectives. State institutions or programs, and conventional capitalist firms such as sole proprietorships, partnerships and investor owned or publicly traded companies are not covered by this definition (Restakis, 2005). Pearce (2003:26) refers to the social economy as the “third system” of the economy that consists of “citizens taking action to meet and satisfy needs themselves and working together in some collaborative way to do this.” In order to sketch

boundaries for the BALTA mapping project, Lewis (2006) draws on Pearce's (2003) definition but further confines the sector, for simplicity and clarity, to the parts of the third system that engage in market activity, or trading. Even though many organizations are driven by the principle of reciprocity, not all engage in market or trade related activity.

Marie Bouchard, the Canada Research Chair on the Social Economy, in comparison, used a somewhat different set of criteria for her profile of the social economy in Montreal including (1) carrying on an economic activity; (2) social rules prohibiting or limiting distribution of surpluses among members; (3) voluntary association of persons; and (4) democratic governance processes (Bouchard, Ferraton, & Michaud, 2006). Based on Lewis' (2006) definition and in accordance with the qualification criteria used by the Canada Research Chair on the Social Economy, the BALTA social economy survey used four binding and two optional (*) criteria that organizations should meet to qualify as part of the social economy. Organizations need to (1) have an explicitly stated social and/or environmental purpose/mission; (2) achieve social/environmental purpose(s) by engaging, at least in part, in trade-related market activity; (3) be accountable to a defined constituency; (4) reinvest surpluses back into the community or into the organization/enterprise for the purposes of achieving social/environmental goals; (5) not distribute profits to individuals* and (6) engage in democratic governance*.

Defining the social economy is clearly not straightforward. Any definition will have limitations particularly where boundaries are blurred. For example, using specific legal forms of organizations as criteria for inclusion (or exclusion) will draw clear lines but also lead to a number of problems. Focusing on the legal form rather than the function or purpose of organizations will lead to certain misrepresentations, for example, when for profit institutions are excluded even though some for profit corporations may distribute all their profits to charitable organizations. Accepting all cooperatives by virtue of their legal form, on the contrary, may include organizations that, as many may argue, should not be considered as part of the social economy per se. The often mentioned example of Mountain Equipment Co-Op (MEC) illustrates this point. MEC fits all of the BALTA criteria as a social economy actor. But MEC has been criticized. And we are aware that its claims to sustainable retailing have been challenged, and it is seen to be contributing to overconsumption of both products and wilderness. Others argue that MEC competes with small sporting goods retailers. For example, MEC's move into bicycling has been perceived as threatening "Mom and Pop" sport stores. That said, we have drawn a

different conclusion than the critics, and feel the positive outweigh the negative impacts of MEC, and are open to improvement because of the democratic structure of the cooperative.¹

Project Description

The design and implementation process of the BALTA social economy survey consisted of the following three tasks: (1) development of an online questionnaire aimed at capturing basic information regarding who constitutes the social economy in BC and Alberta; (2) identification of potential survey participants and generation of a contact list of the sample population; and (3) recruitment of participants and administration of the survey. An overview of these tasks is provided below; for a full discussion of the process and research decisions see Affolderbach, Gismondi, and Soots (2009).

Questionnaire development and testing

Drawing on general literature regarding survey design and implementation (Dillman, 2007), mapping surveys from other Canadian research nodes (Atlantic, Northern Ontario, Manitoba, Saskatchewan, Southern Ontario, Northern Canada) as well as research conducted in the UK (Blanc et al., 2001; Department of Trade and Industry (UK DTI), 2004; ECOTECH Research and Consulting Ltd., 2003; The Guild, 2001) the BALTA mapping questionnaire was designed around several theme areas including basic contact information, geographic range, stated mission and objectives, organizational and legal structure, employment, financial information, support functions and networking which resulted in 26 questions. Before the survey launch in January 2008, the questionnaire was tested by the research team as well as a number of selected organizations to improve and ensure clarity of content and usability of online tools.

Identification of participants

Due to the heterogeneity of definitions and approaches used, no comparable database of the social economy in Canada is available. One of the major challenges of the BALTA mapping project has been to identify organizations located and/or operating in BC and Alberta that meet the BALTA social economy

¹ See the discussions in Jason Ponto. (2008). Is Mountain Equipment Co-op a Social Enterprise? Using the Genuine Wealth Model to Assess MEC's Place in the Social Economy. MA Integrated Studies Athabasca University. <http://dtp.r.lib.athabascau.ca/action/download.php?filename=mais/JasonPonto701Project.pdf>;

Tracey Woitenko. (2008) Sustainable Retail Development: A Case Study of Mountain Equipment Co-op. MA Thesis University of Manitoba. <http://hdl.handle.net/1993/3095>

definition and to compile a contact list (database) of these organizations. A number of factors complicate identification of the sampling population. First, the total sampling population is unknown, as the sector has never been profiled in its entirety. For this reason the National Survey on Nonprofit and Voluntary Organizations (NSNVO), when conducting their survey, excluded organizations that were not formally incorporated or registered with provincial, territorial or federal governments because of the “substantial difficulties identifying and locating them” (Roach, 2006. p. 4). Second, the targeted population does not necessarily identify with the social economy, as the concept or descriptor is not often used by practitioners. The term itself is fairly new. Finally, gathering contact information was limited by the human and financial resources available.

We chose an opportunistic approach to include as many organizations as possible. To compile the database of organizations, a purposive sampling approach was chosen that would allow us to use BALTA member organizations, sector leaders and meeting venues to identify organizations within the sector. As Palys (2008) and Neuman (2004) point out, purposive sampling methods don’t aim for formal representation but try to locate as many cases as possible using many different methods to identify members of the targeted population. Purposive techniques are often used to locate members of hard to reach, specialized or unknown populations. Further, we used snowball sampling, personal linkages and networks between BALTA members, their organizations, and other social enterprises to reach out to formerly unknown organizations in order to increase our sample size. While organizations included in the database were selected according to certain criteria, they don’t necessarily meet the BALTA social economy classification criteria introduced above. A total of 1600 organizations were identified for the final list.

Recruitment and implementation

The online questionnaire (See Appendix 1) was housed at Athabasca University. The survey stayed active for the duration of the mapping project (2008-2010) and was open to all organizations and actors that were part of the social economy.

Since January 2008, invitations to participate in the BALTA Social Economy survey were emailed to these 1600 organizations followed by reminder emails. When the survey was closed in January 2011, a total of 478 organizations had responded. While the majority of organizations filled out the survey and submitted it themselves, a minority of the sample completed the survey through a telephone interview

with a research assistant (RA) from the BALTA project team. In these cases, the RA entered and submitted responses on behalf of the participants. Another small portion of participants responded to a print version of the online survey. These responses were entered into the survey data base by the principal investigator. This report is based on the findings from the total of 478 completed surveys. A breakdown by province revealed that of the 478 completed surveys, 159 (33%) were Alberta based, and 319 (67%) were based in BC.

While the term 'social economy' is somewhat vague, as many definitions exist, and views on who is 'in' and who is 'out' can differ to a certain degree, this paper does not elaborate the debate. Rather, all of the responses we have received are included in our analysis, based on the assumption that participating organizations and actors identify with or see themselves as part of the social economy.

The final response rate for this survey is difficult to calculate. Although, as noted above, 1600 invitations were sent out, not all of the organizations who received an invitation would have considered themselves as part of the social economy. As such, 1600 may have been an inflated number representing the combined social economy populations in Alberta and BC. On the other hand, other organizations not represented in this original list, through word-of-mouth, chose to complete the online survey. These organizations, while they appear as part of the final sample, were not accounted for in the original population numbers that would normally be used to determine overall response rate.

This final report is based on the information gathered **from the 478 respondents** and provides a summary of responses to all of the questions that were posed in the survey. Each section begins with an introductory statement about the importance of the particular measure being discussed. A number of sections also have "pull quotes" highlighting an important finding from that section. Many of the summaries are broken down by province, and comparisons are made between the two provinces where relevant. An important reference is Table 16: Key points of comparison by province provided in Appendix I. The report profiles the demographic information about organizations before discussing the many ways in which these organizations impact our communities: geographic ranges served, social/environmental missions, work sectors, employment information, and finally their financial contributions.

Did you know?

An interesting portrait of the social economy in Alberta and British Columbia has begun to emerge from the BALTA mapping project. The 478 organizations that responded to the survey provided the base for a reflective discussion of this increasingly important element of the economy. **Please note carefully**, that these numbers would be much greater if the whole sector is reviewed, but nevertheless they do show patterns that are suggestive.

- SE organizations are purposeful.
 - Almost 90% of organizations reported having an explicitly stated social purpose/mission guiding their work. Most frequently these missions are related to education and training, the provision of basic needs, health, housing, human rights and family services;
 - A significant proportion (26%) also reported having an environmental purpose/mission, and the majority of these focused their activities on conservation and protection, along with resource management.
- SE organizations help to build social capital in communities.
 - Most organizations serviced their local communities: cities and towns (>40%) and regional areas (50%);
 - A high number of organizations within the SE also provided support to each other (73%);
 - Over 75% of profits generated by SE organizations were invested back into the organization.
- SE organizations are active in the economy.
 - Operating budgets reported by SE organizations in the two provinces totaled over \$638 million (N=381; 80%), while the capital budgets exceeded \$1.19 billion (N=142; 30%).
 - There was \$2.62 billion in revenue, of which \$1.95 billion was generated through participation in the market economy, reported by 355 SE organizations.
- SE organizations participate in a variety of work sectors.
 - While over 40% of SE economy organizations described their “primary” work sector to be in the services sector, the participation of others ranged from agriculture, forestry, fishing and mining to arts and culture, housing, environment, and business.
- SE organizations provide numerous employment opportunities.

- More than 12,500 people were employed full-time, in addition, 4500 part-time employees worked in the SE;
- Organizations also provided seasonal (971) and contract opportunities (2111);
- and, a total of 1694 target group members were employed within 109 SE organizations.

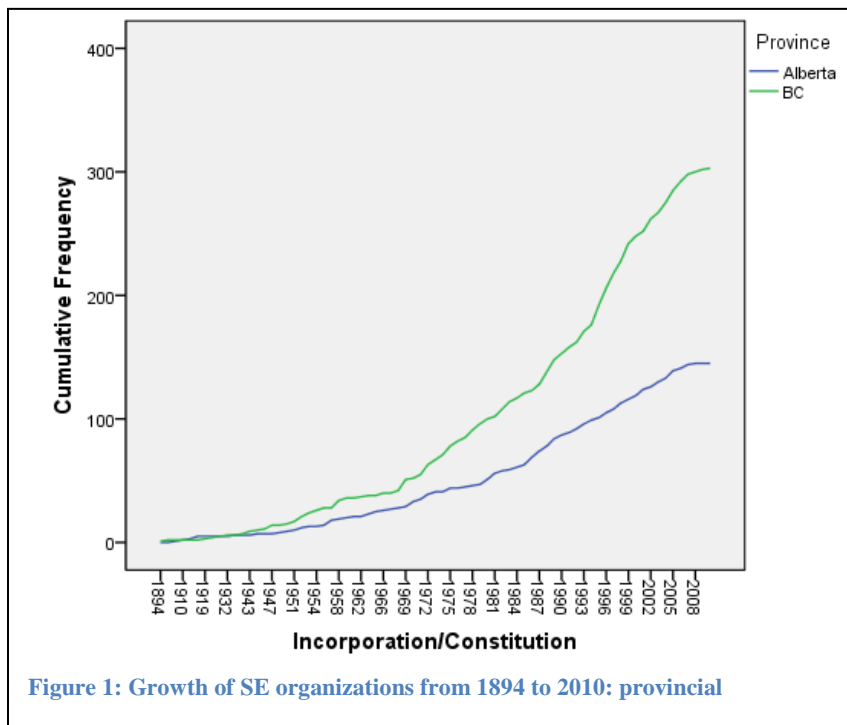
Profile of Social Economy (SE) Organizations in Alberta and BC

Organizational Structure

Information regarding the age, legal form and membership base of organizations provide a first overview of the responding social economy organizations.

Age

Even though our sample (n=478) included a number of long-established organizations that have been around for over 50 years (13.5% of respondents), the median age of 22 years indicates that half of the organizations are relatively young. The majority of organizations (66%) were founded in the last 30 years particularly in the late 1980s, late 1990s and mid 2000s. Bouchard et al. (2008) reported a comparable average age of 19 years in their profile of the social economy in the Montréal region. The average age of



Alberta SE organizations (N = 159) is slightly older than BC organizations (N=319) (28.7 years and 25.9 years respectively). The most senior Alberta SE organization was incorporated in 1909; the most junior, in 2008. In BC, the oldest organization was incorporated in 1894, the newest, in 2010. Figure 1 describes the growth of SE organizations (i.e. cumulative frequencies) from 1894 to 2010.

Detail notes:

Oldest organizations in Alberta include, for example, UFA Cooperative Limited (established in 1909); Bissell Centre (established in 1910); Alberta Federation of Labour (established in 1912); Scouts Canada – Chinook Council (established in 1914); and Scouts Canada – Northern Lights Council (established in 1914).

In 2010, Alberta's newest organizations included, for example, Alberta Rural Development Network (established in 2008); Lurana Shelter Society (established in 2007); Water Matters Society of Alberta (established in 2007); and R.O.A.R.S. (established in 2007).

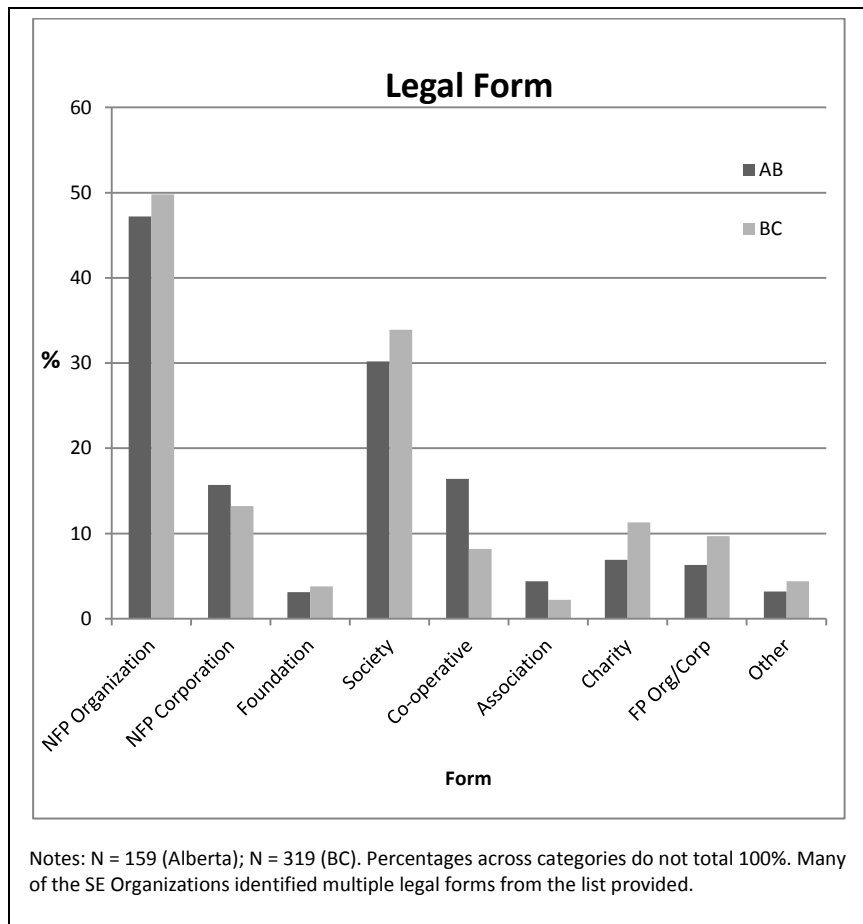
Oldest organizations in BC include, for example, Vancouver Museum (established in 1894); Tourism Vancouver (established in 1902); and Brigadier Arthur Cartnell House – The Salvation Army (established in 1919).

In 2010, BC's newest organizations included, for example, Pro Organics (established in 2010); Tony's Place (established in 2009); Cyruc Centre Ministries (established in 2009); Alan Brooks Nature Centre (established in 2008); and Made in BC Dance on Tour Society (established in 2008).

Legal Form

With respect to the legal form of their organization, respondents could choose from a list, or provide information in the “Other” category. As seen in Figure 2, the majority of SE organizations in Alberta and BC identified their legal form as a not-for-profit organization (47% and 50% respectively) and/or a society (30% and 34%). This high number of “not for profit organizations” and “societies” reflected the priority of social and environmental goals rather than shareholder profits within SE organizations. A significant minority of organizations in Alberta and BC also identified themselves as not-for-profit-corporations (16% and 13% respectively), and co-operatives (16% and 8%). Respondents who chose the “Other” category were asked to specify type. In this section, a small proportion of organizations in both Alberta and BC indicated that the legal form of their

The majority of SE organizations in Alberta and BC identified their legal form as a not-for-profit organization (47% and 50% respectively) and/or a society (30% and 34%).



organization was that of “charity”, so a separate category was created (AB=7% and BC=11%). The remaining “Other” legal forms noted by 3% (N=5) of the Alberta SE organizations included, for example, networks, no current legal form, a joint venture organization, and affiliate. “Other” legal forms noted by 4% (N = 14) of the BC organizations included for example, educational institutions, networks, coalition, trust, and not normally incorporated.

Figure 2: Legal form of organization: provincial percentages

Membership Base

In terms of accountability to a defined constituency, two thirds (66%) of all SE organizations (316/478) stated that their organization had a membership base, and 297 of these specified the size of their membership. The total membership reported by these organizations was 3,425,441. The number of members per organization, however, varied considerably ranging from four to 2.8 million² (in the case of a non-financial cooperative). As Table 1 indicates, almost half (47%) of all membership based organizations have less than 100 members, while 19% of organizations reported to have over 500 members.

Provincially, 70% (N = 112) of organizations in Alberta, and 64% (N = 204) in BC reported a membership base. The median (mid-point of the distribution) for organizations in Alberta was 135 (N = 104) and for those in BC, the median was 126 (N = 193). Membership numbers across the various SE organizations ranged from 6 to 2.8 million in Alberta; and from 4 to 392,000 in BC. Table 1 provides a summary, by province, of the number of organizations working within a range of membership group sizes.

Table 1: Membership size: provincial ranges

Size of Membership Base	Alberta		BC		Total	
	N	%	N	%	N	%
1-25 members	13	12.5	34	17.6	47	15.8
26-50 members	14	13.5	36	18.7	50	16.8
51-100 members	15	14.4	29	15.0	44	14.8
101-200 members	20	19.2	31	16.1	51	17.2
201-500 members	19	18.3	30	15.5	49	16.5
501-1000 members	7	6.7	12	6.2	19	6.4
1000 + members	16	15.4	21	10.9	37	12.5
Totals	104	100	193	100	297	100

Detail notes:

In Alberta, the Mountain Equipment Co-op reported the largest number of members (2.8 million). Other organizations in Alberta with large memberships included, for example Alberta Federation of Labour (140,000), UFA Co-operative Limited (120,000), and The Mustard Seed Calgary Street Ministry (85,000) and the Calgary Cooperative Memorial Society (23,000), Scouts Canada – Chinook Council (9,500), Scouts Canada – Northern Lights Council (6,800).

² We reported MEC membership as reported to us. This appears to have been the national membership as of 2009 when they filed. A recent report on MEC membership shows the global membership at 3.6 million, of which about 38.8 percent reside in BC and AB (some 1.324.936).

http://www.mec.ca/AST/ContentPrimary/Sustainability/AccountabilityReport/Members.jsp?CONTENT%3C%3Ecnt_id=10134198674183551

In BC, Vancity Credit Union reported the largest number of members (392,000). Other organizations in BC with large memberships included, for example, Vancity Community Foundation (80,000), Vancouver International Film Festival (66,000), Kootenay Savings (43,000), and BC Native Housing Corp (30,000).

Board of Directors

Of the organizations surveyed 447/478 (94%) provided information about their board of directors. In Alberta the median number of board members was calculated as 9 (N = 156; range 1 - 134 members); in BC the median figure was also 9 (N = 291; range 1-87 members). Table 2 summarizes by size categories, board membership for Alberta and BC SE organizations.

Table 2: Board membership size: provincial ranges

Board membership size	Alberta		BC		Total	
	N	%	N	%	N	%
1-5 members	24	15	48	16	72	16
6 -10 members	81	52	155	53	236	53
11 - 20 members	46	30	84	29	130	29
21 - 50 members	4	3	3	1	7	2
51 – 100 members	0	--	1	<1	1	<1
100 + members	1	<1	0	--	1	<1
Totals	156	100	291	100	447	100

Detail notes:

The organization with the largest board in Alberta was the Edmonton Social Planning Council (134 board members); in BC it was the POLARIS Employment Services Society (87 board members).

Our study indicated that SE organizations in BC and Alberta not only provided goods, services and employment to women, but were also characterized by a strong representation of women in leadership roles within their organizations (measured by the percentage of women on boards of directors). When asked about the gender composition of the boards, slightly fewer organizations responded (N=440). Of these organizations, 93.4% had at least one female board director, and 42% (N=187) organizations had more female than male directors. From the total of 4164 board members reported, 1919 (46%) were women. In Alberta, the median number of female board members was calculated as 3.5 (N = 152; range 0 - 26 members); in BC the median figure was 4 (N = 288; range 0-16 members). Table 3 summarizes by size categories, female board memberships for Alberta and BC SE organizations.

Table 3: Female board membership: provincial ranges

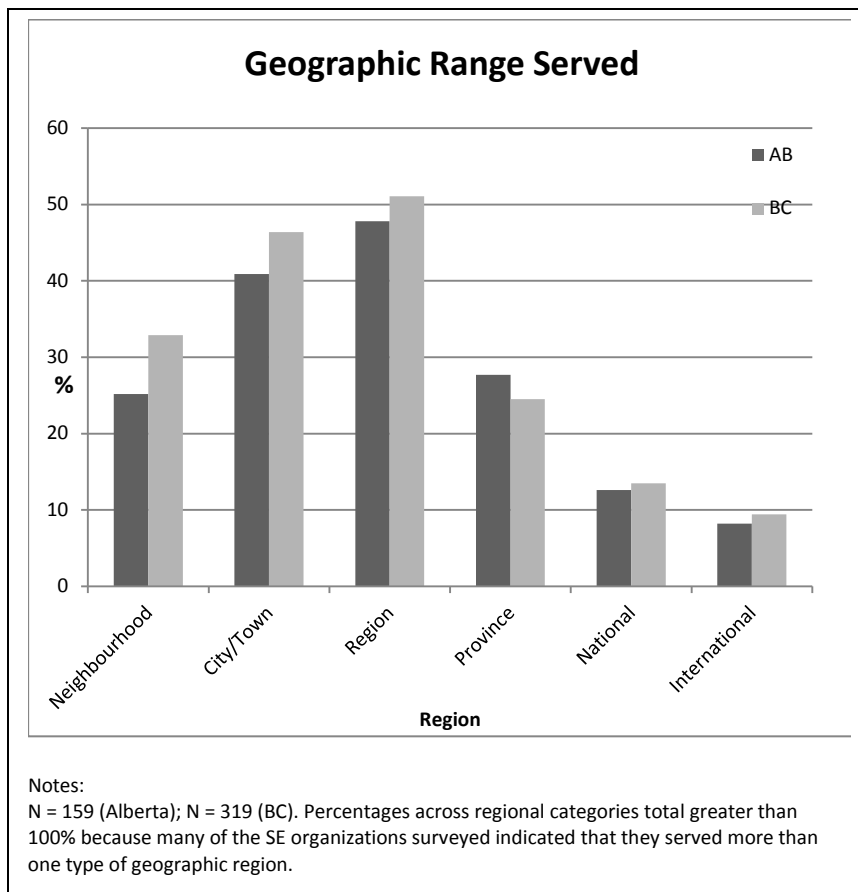
Female Board membership size	Alberta		BC		Total	
	N	%	N	%	N	%
0 members	18	12	11	4	29	7
1-5 members	94	62	181	63	275	63
6 -10 members	36	24	89	31	125	28
11 - 20 members	3	2	7	2	10	2
21 - 50 members	1	<1	0	--	1	<1
51 – 100 members	0	--	0	--	0	--
100 + members	0	--	0	--	0	--
Totals	152	100	288	100	440	100

To provide a comparison to the numbers outlined above, a 2011 census of women board directors of Canada’s 500 largest companies, only 14.5% of board seats were held by women, up from 13% in 2006 (Catalyst, 2006). Approximately 40 percent of companies had no female board directors (Mulligan-Ferry, et al., 2012), comparatively only 7% (N=29) of the SE organizations indicated no female board directors. The census also showed that Alberta and BC companies are below the national average of 14.5% of women board directors with 10.2% and 13% respectively (Mulligan-Ferry et al., 2012). Even compared to the three sectors with highest percentages of women directors in the census, accommodation and food services (26.8%), public administration (25.5%), and arts, entertainment and recreation (24.2%), the SE survey sample showed considerably higher representation of women board directors (46%).

Geographic Range Serviced

The social economy literature, particularly on community economic development, frequently emphasizes the local scale of operations of social enterprises. Loxley et al. (2007), for example, emphasize the importance of backward and forward local linkages. Previous work in NSNVO has revealed a strong focus on the local with 62% of BC organizations and 74% of Alberta organizations serving the local municipality and 20% and 13% respectively working regionally within the two provinces (Murray, 2006; Roach, 2006). Our sample confirmed the local focus of SE organizations in AB and BC.

The reach of Alberta and BC organizations extended from neighbourhoods or local communities to international regions (Figure 3). Most frequently, Alberta and BC organizations surveyed provided services to their neighbourhoods (25% and 33%, respectively), their cities and towns (41% and 46%), their regional areas (48% and 51%) and to their provinces (28% and 25%). A smaller number of Alberta and BC organizations reported serving geographic ranges that were further afield, including national (13% and 14%) and international (8% and 9%) areas.



In Alberta, the majority of organizations (81%; N = 129) indicated that they operated in the province with only one organizational unit (like a main office, branch or regional office). In BC, 85% (N = 272) of the SE organizations also noted a single organizational unit. See Appendix III for more detail.

Figure 3: Geographic range serviced: provincial

Support for Other Organizations

Linkages and networks among SE organizations enhance the social capital of an area and are often cited as a benefit of the social economy. Social capital refers to the attitudes that develop around neighbourliness, trust, and cohesion that allow people to work together more easily (Logue, 2006). This

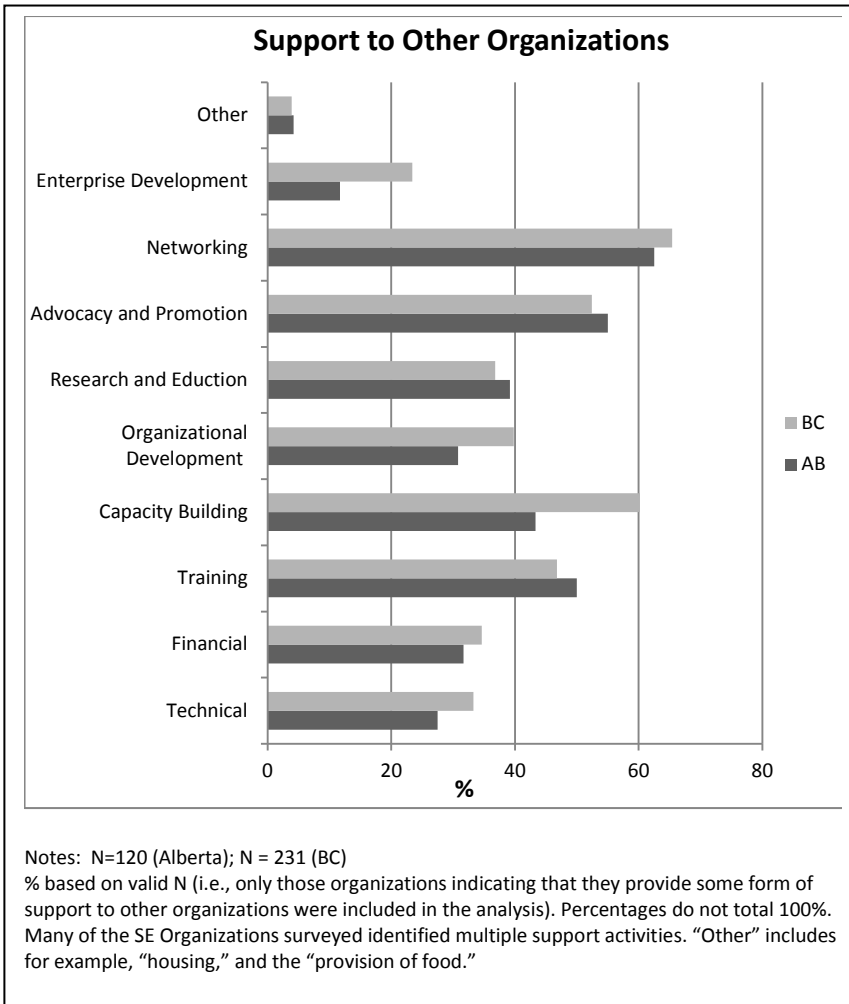


Figure 4: Type of support for other organizations: provincial percentages

(55% and 52%), training (50% and 47%), research and education (39% and 37%), and financial support (32% and 35%).

characteristic was prominent in our survey with 73% (351 / 478) of organizations stating that they provided support to other organizations. The trend was slightly higher in Alberta with 75.5% (N = 120) of SE organizations providing support, compared to 72.4% (N=231) in BC.

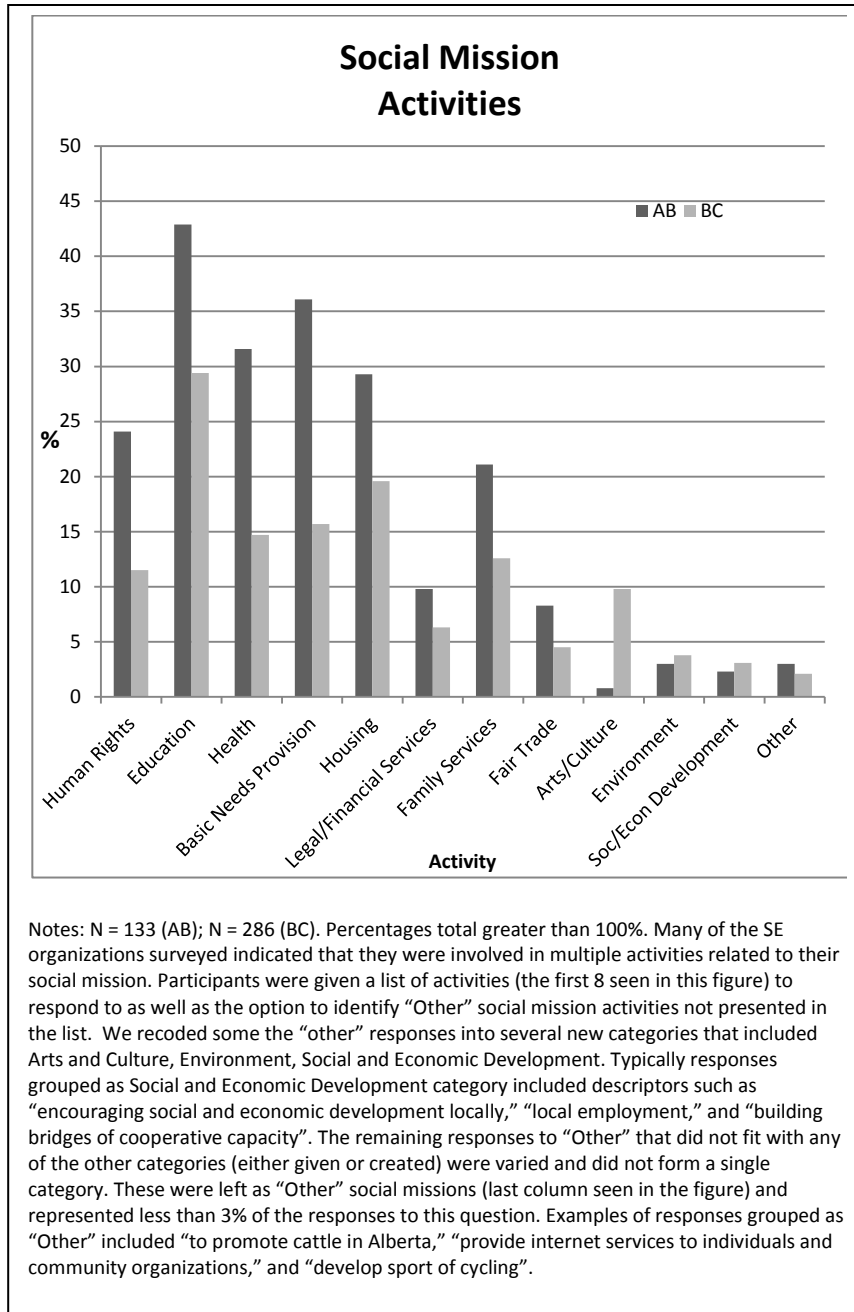
Figure 4 summarizes the types of support provided by these organizations. Most frequently Alberta and BC organizations provided support in the form of networking (63% and 65% respectively), capacity building (43% and 60%), advocacy and promotion

Purpose and Missions

Another important characteristic used by BALTA to define social economy organizations is the existence of “an explicitly stated social and/or environmental mission”.

Social Missions

Overall, 88% (N = 419/478) of the SE organizations surveyed indicated that their organization had an explicitly stated social purpose/mission. Provincially, BC (N=286; 90%) showed a slightly higher proportion of organizations with social missions than did Alberta (N = 133; 84%). Organizations were



able to describe their social mission by both the activities of the organization, and/or by the groups served by the organization. Respondents were asked to choose “all that apply”, so multiple responses were given by many.

Figure 5 provides a summary, by province, of the proportion of SE organizations that identified an activity of their organization to define their social mission. For Alberta and BC, the social mission activities most frequently stated were participation in the education sector (43% and 29%, respectively), provision of basic needs (36% and 16%), participation in the housing sector (29% and 20%) and in health service

Figure 5: Social mission by activities: provincial percentages

(31% and 15%).

Organizations were also able to describe their social purpose/ mission by the target groups or communities they serve. Almost 50% of SE organizations who identified a social mission defined their “primary” social mission in terms of the groups/populations they served.

Almost 50% of SE organizations who identified a social mission defined their “primary” social mission in terms of the groups or populations they served.

Figure 6 summarizes the responses from these organizations. The types of groups served by the SE organizations were diverse, and, in many cases, multiple groups were identified.

For Alberta and BC, the most frequent target groups identified were the general community (44% and 37% respectively); lower income individuals (31% and

24%); children and youth (38% and 21%); disabled persons (27% and 26%), homeless persons (27% and 16%); and Indigenous peoples (29% and 16%).

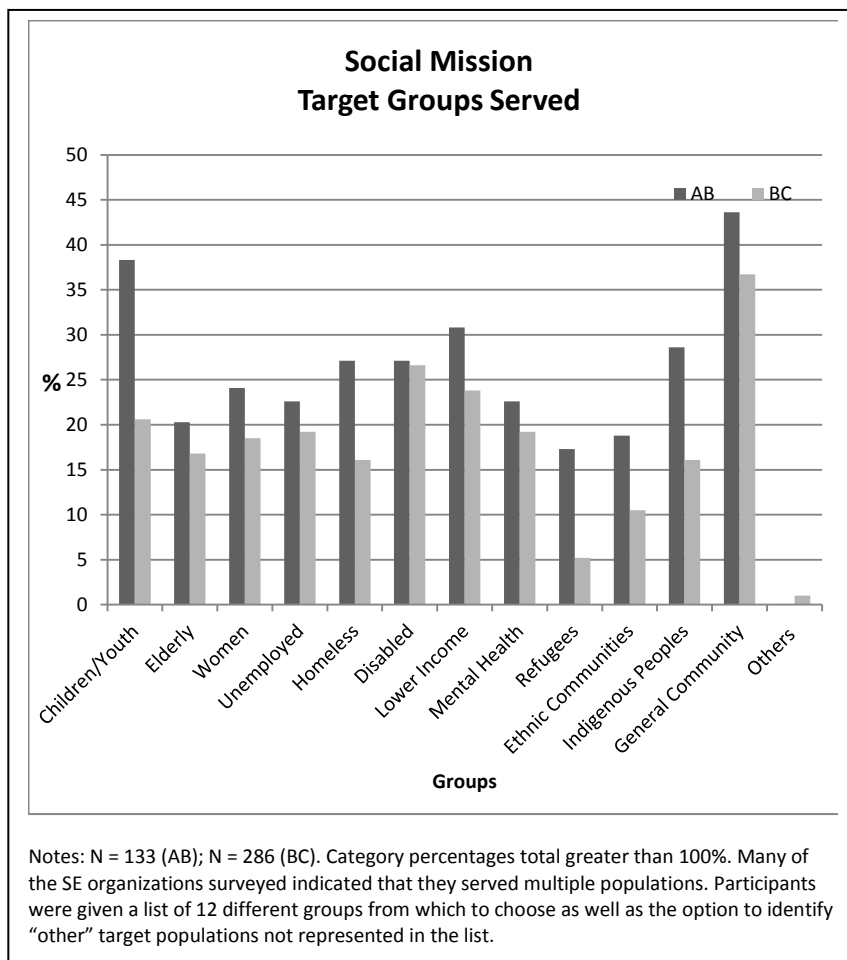


Figure 6: Social mission by target group: provincial percentages

Of the many social missions (activities and target groups served) identified for each SE organization, participants were then asked to specify one primary category. Not all of the organizations who indicated multiple social missions responded to this question (N = 365). Figures 7 and 8 provide summaries, by province for these organizations.

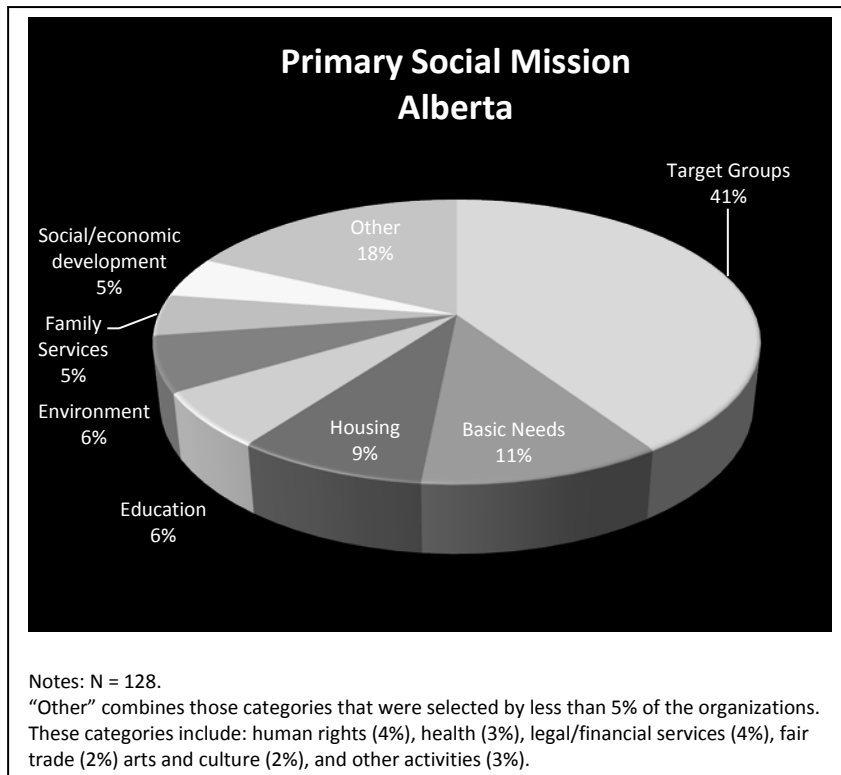


Figure 7: Primary social mission: Alberta percentages

were distributed between social missions that related to human rights, health, legal/financial services, fair trade, arts and culture, and other activities.

For the 41% of organizations in Alberta who indicated that their primary social mission was best articulated through the sorts of populations they served (N = 52), the groups were diverse and included children and youth (N =9); elderly persons (N =3); homeless persons (N = 4); persons with disabilities (N = 4); lower income individuals (N = 4); persons with mental illness (N = 3); ethnic communities (N = 2); Indigenous people (N = 3); general community (N = 14); and other populations (N = 6).

As seen in Figure 7, of the 128 Alberta organizations who specified a primary category for their social mission, 41% (N = 52) noted a particular target group served, 11% (N = 14) specified the provision of basic needs, 9% (N = 11) stated a housing focus, 6% (N = 8) indicated an education focus, and an additional 6% noted an environmental focus. Social missions relating to family services and social / economic development each accounted for 5%. The remaining 18%

As seen in Figure 8, of the 237 BC organizations who specified a primary category for their social mission, 51% (N = 121) noted specific target groups served as the focus of their social mission, 12% (N = 28) specified a housing focus, 9% (N = 21) indicated an education focus, 6% (N = 14) identified social/economic development, and 5% (N = 12) highlighted arts and culture. The remaining 17% (N = 41), were grouped into an “Other” category Figure 8 (see notes).

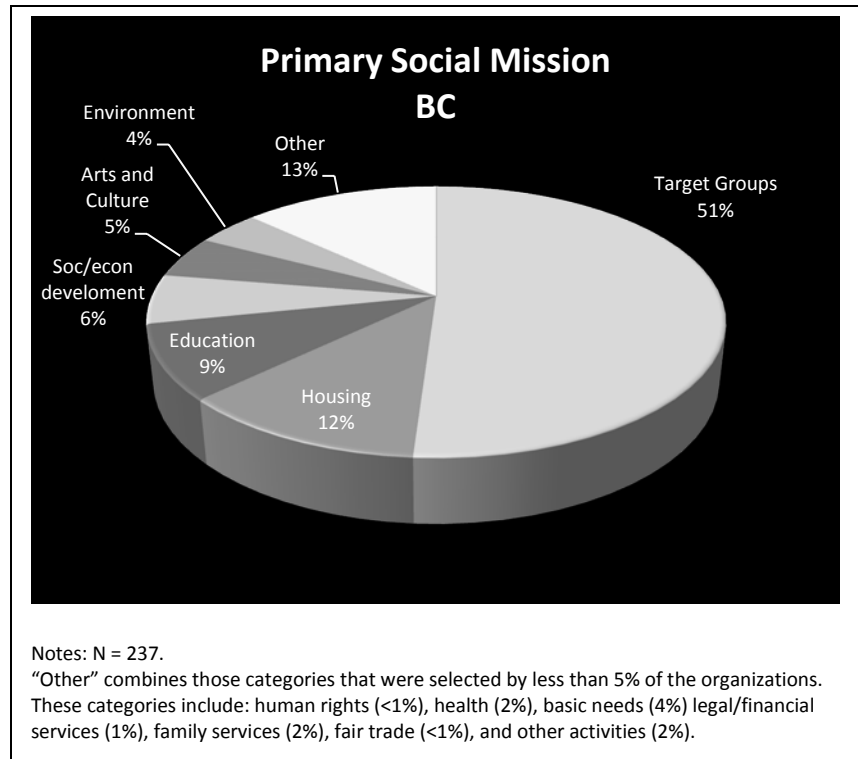


Figure 8: Primary social mission: BC percentages

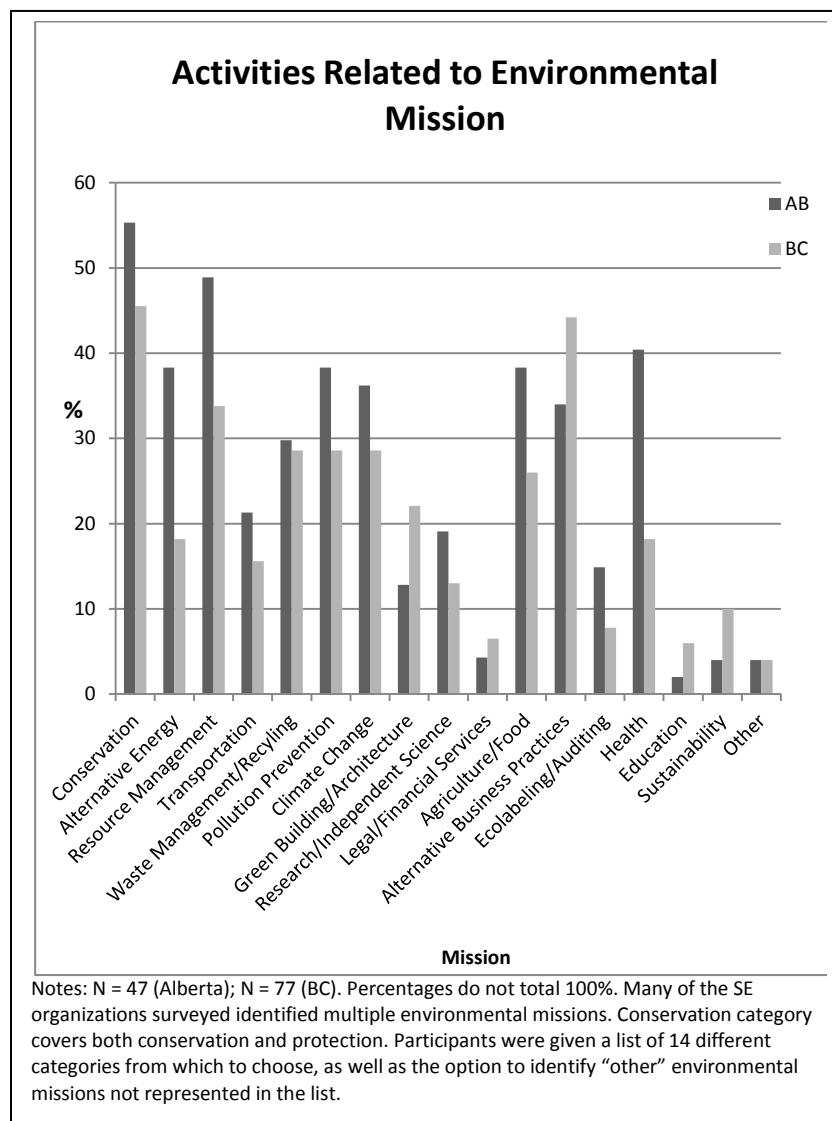
For the 51% of organizations in BC who indicated that their primary social mission was best articulated through the target groups they served (N = 121), the groups were diverse and included children and youth (N = 6); elderly persons (N = 10); women (N = 10); unemployed persons (N = 10); homeless persons (N = 4); persons with disabilities (N = 13); lower income individuals (N = 3); persons with mental illness (N = 6); ethnic communities (N = 2); Indigenous people (N = 8); general community (N = 45); and other populations (N = 4).

One thing that jumps out is that ‘basic needs’ is a very significant category in AB (11%), but less so in BC (4%). Why? Clearly there are groups in BC addressing basic needs, every bit as much as AB, but apparently this is not how they choose to frame their work, given a choice of alternative responses to the survey. Whereas in AB, it seems a preferred way of characterizing the work for a significant number of groups. Then again, basic needs may be picked up in BC by the larger number of groups addressing the ‘general community’ under Target groups.

Environmental Missions

Overall 26% (N =124) of the organizations surveyed across Alberta and BC indicated an explicitly stated environmental mission or purpose. A breakdown by province shows that 30% (N = 47) of SE organizations in Alberta and 24% (N = 77) in BC identified an environmental mission. Figure 9 summarizes, by province, the sorts of activities that these organizations identified in relation to their environmental mission.

For Alberta and BC, the most frequently identified activities included conservation and protection (55%



and 46% respectively); resource management (49% and 34%); alternative business practices (34% and 44%); and health (40% and 18%). Pollution prevention (38% and 29%), along with climate change (36% and 29%) were also noted by these organizations.

Figure 9: Environmental mission activities: provincial percentages

Of the multiple environmental missions listed for their organizations, participants were asked to specify a primary category for their environmental mission (see Figure 10 and Figure 11). As with the question requesting participants identify a primary social mission, not all of the organizations who indicated an environmental mission responded to this question (N =105).

Figure 10, shows that, of the 45 Alberta organizations who specified a primary category for their environmental mission, 27% (N = 12) noted conservation and protection as the focus of their mission, 13% (N = 6) specified health, 9% (N = 4) stated resource management, and 9% (N = 4) mentioned agriculture and food. There was a relatively large “Other” group (29%; N = 13) whose stated environmental missions covered a broad range of activities (see note in Figure 10).

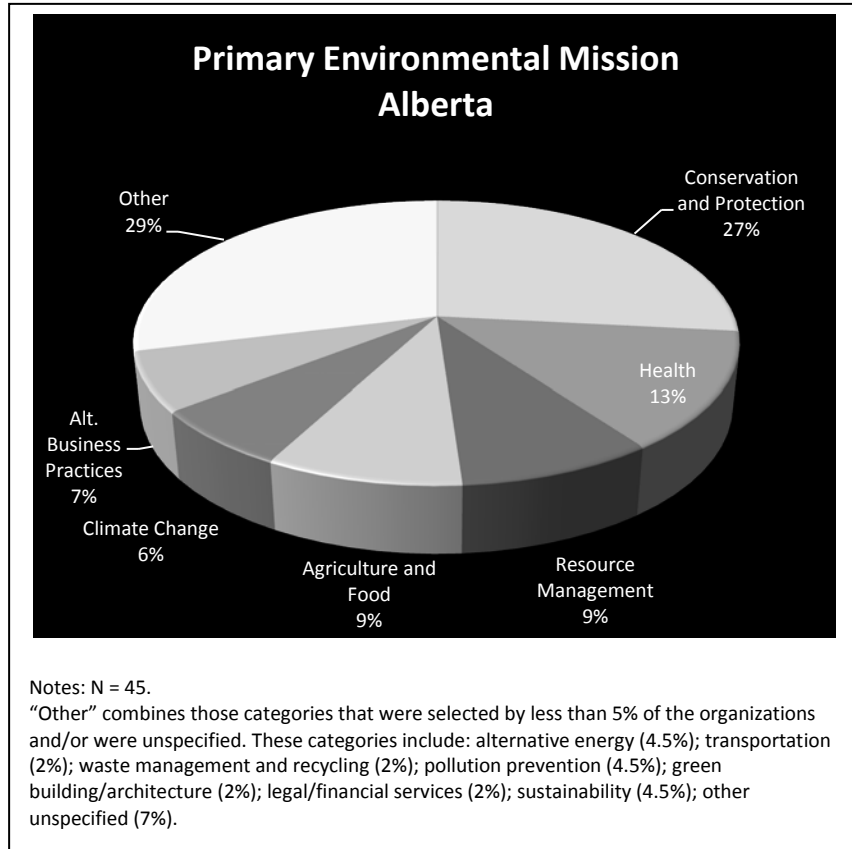
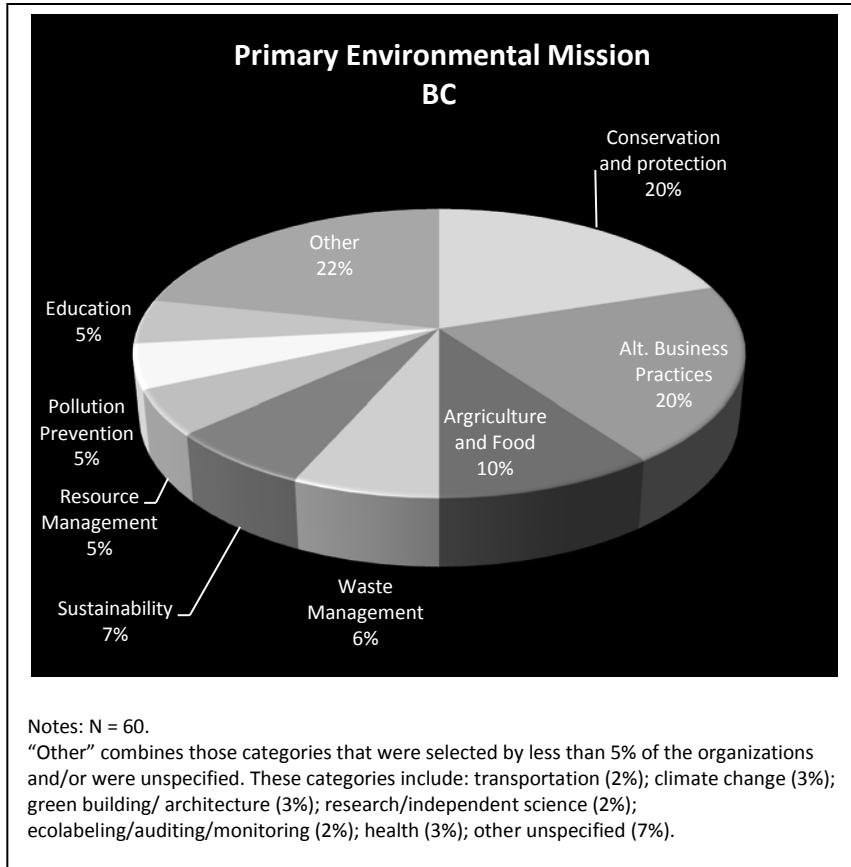


Figure 10: Primary environmental mission: Alberta percentages

As seen in Figure 11, of the 60 BC organizations who specified a primary category for their environmental mission, 20% (N = 12) noted conservation and protection as the focus of their mission,



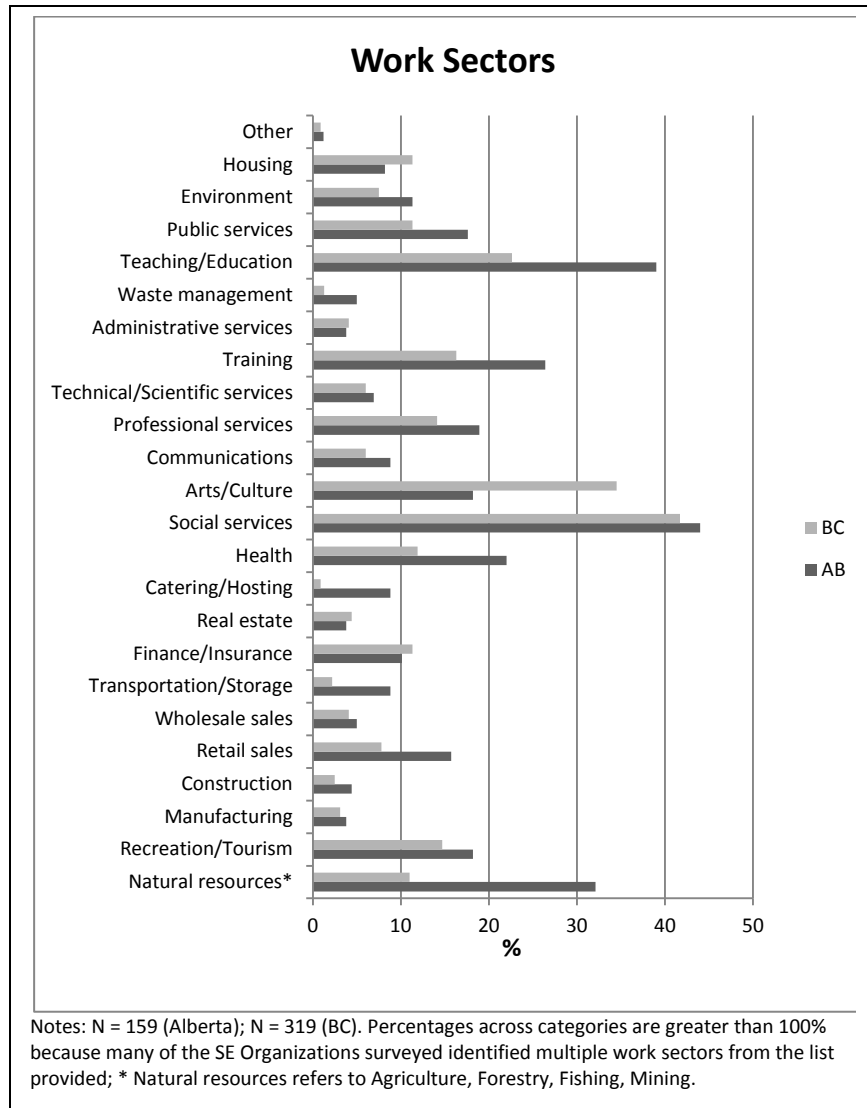
20% (N = 12) specified alternative business practices, 7% noted sustainability (N = 5), and 6% (N = 4) indicated waste management. As with the Alberta sample, there was a relatively large "Other" group in the BC sample (22%; N = 13) whose stated environmental missions covered a broad range of activities (see note in Figure 11).

Figure 11: Primary environmental mission: BC percentages

Work Sectors

In order to analyze social economy organizations according to their primary activity Bouchard et al. (2008) developed a classification system (meta-categories, categories, sub-categories) that combined insights from Canadian and Quebec surveys of the voluntary, non-profit, arts and culture, and cooperative sectors, with classification categories of the North America Industrial Classification System (NAICS). This strategy was developed to provide a more sympathetic and internationally comparable classification system for examining the social economy. The BALTA mapping survey question asking for organizations' primary sector of activity is based on the second category, or middle level of the classification system developed by Bouchard et al. (2008).

Participants were asked to "[p]lease identify [all] the sectors that your establishment works in" and were given a list of 21 sectors, as well as the opportunity to include "Other" sectors not mentioned in the list. A



significant minority of Alberta and BC organizations used the "Other" category to identify "housing" (8% and 11% respectively) and the "environment" (11% and 7%) to describe the work they do. These categories have been included in Figure 12.

All 478 organizations responded to this question reporting involvement in a variety of businesses, as well as contributions to a diverse range of working environments. The largest proportion of AB organizations noted that their work focused in the sectors of teaching and education (39%), social services (44%), and in activities related to the natural resources (e.g., agriculture, forestry, fishing, and mining) (32%). Slightly different proportions of work sectors were identified by SE organizations in BC with the largest proportion of organizations noting their work focused in arts and culture (35%), social services (42%), and in teaching and education (23%).

Primary Work Sector

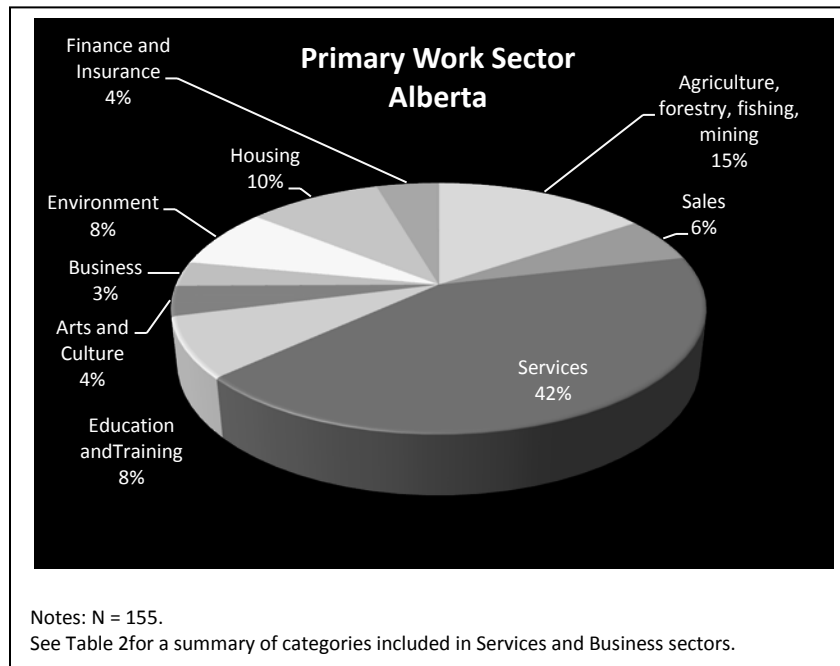
Participants were further requested to specify “... the primary sector” in which their establishment was involved. Detailed information from the 466/478 responding organizations is summarized in Table 4.

Table 4: Primary work sector: provincial

Work Sector	Alberta		BC		Total	
	%	N	%	N	%	N
Agriculture, forestry, fishing, mining	15.5	24	3.5	11	7.5	35
Finance/insurance	4.5	7	7.7	24	6.7	31
Arts and culture	3.9	6	23.8	74	17.2	80
Environment	7.7	12	5.1	16	6.0	28
Housing	9.7	15	7.4	23	8.2	38
Sales						
Retail	4.5	7	1.3	4	2.4	11
Wholesale	1.3	2	0.6	2	0.9	4
Services						
Social	25.8	40	28.9	90	27.9	130
Professional	4.5	7	7.1	22	6.2	29
Technical/scientific	1.9	3	0.6	2	1.1	5
Administrative	--	0	--	0	--	0
Public	3.2	5	2.3	7	2.6	12
Health	6.5	10	2.3	7	3.6	17
Education						
Teaching/education	5.2	8	3.9	12	4.3	20
Training	2.6	4	1.6	5	1.9	9
Business						
Manufacturing	--	0	0.3	1	0.2	1
Construction	--	0	--	0	--	0
Transportation/storage	--	0	0.3	1	0.2	1

Real estate	0.6	1	0.6	2	0.6	3
Catering/hosting	0.6	1	--	0	0.2	1
Communications	--	0	0.3	1	0.2	1
Waste management	--	0	--	0	--	0
Recreation/tourism	1.4	2	1.3	4	1.3	6
Other	0.6	1	1.0	3	0.9	4
Totals	100	155	100	311	100	466

In Figure 13 and Figure 14 some of the work sectors have been grouped into categories (as seen in Table 4) such that “sales” includes both retail and wholesale sales; “services” includes social, professional, technical/scientific, administration, public, and health services; “education” includes both teaching/ education as well as training, and “business” includes manufacturing, construction, transportation and storage, real estate, catering/ hosting, communications, waste management, recreation/ tourism, and other businesses.



As Figure 13 shows, the largest proportion of Alberta SE organizations defined their primary work sector as involvement in “services” (42%). Within this group, the majority are engaged in social services (see Table 4 showing that 25.8% of Alberta organizations define their primary work sector in terms of social services). The next largest primary work sector for Alberta organizations was in the field of natural resources

(agriculture, fishing, forestry, and mining) with 15% choosing this area. The third largest primary sector identified by a small, but significant minority of Alberta organizations was the housing sector (10%).

As Figure 14 shows, the largest proportion of BC SE organizations, like those in Alberta, defined their

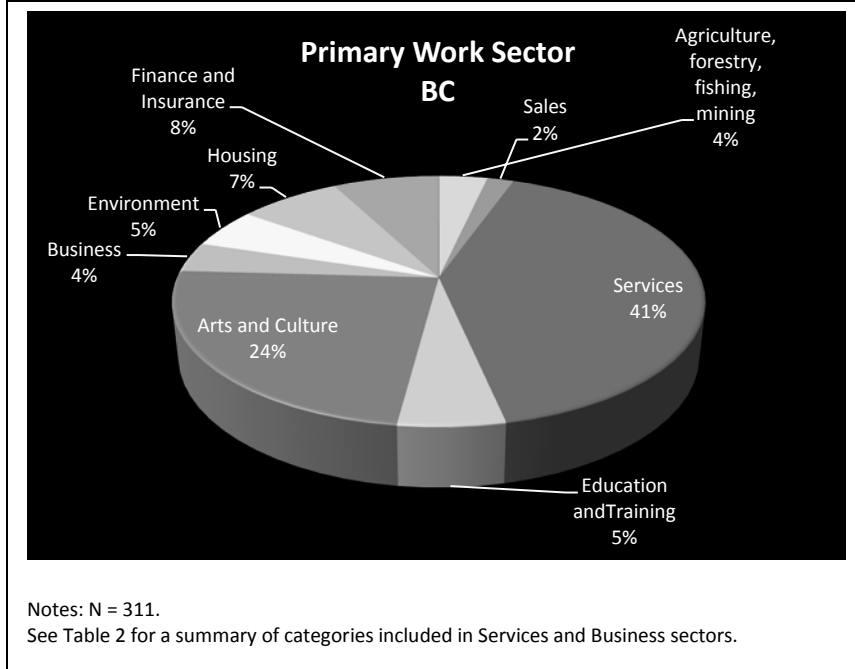


Figure 14: Primary work sectors: BC percentages.

primary work sector as involvement in “services” (41%). Within this group, the majority were engaged in social services (see Table 4 that shows 28.9% of BC organizations defined their primary work sector in terms of social services). The two provinces differed in their second and third most commonly reported primary sectors. In BC, the second largest primary work sector reported in our survey was

arts and culture with 24%, while the third largest primary sector identified was finance and insurance (8%). It is uncertain how much this difference is an accurate reflection of the overall sectors in both provinces, or whether it might reflect the pattern of responding organizations.

Human Resources – Paid and Unpaid Employment

Unlike other economic sectors, the social economy is characterized by a significant proportion of unpaid staff. More than half (56%) of the SE organizations reported employing volunteers. Almost 9% of respondents reported that they rely solely on volunteers, and do not have any full-time or part-time workers, though some had seasonal or contract employees. In addition, 37% (N=176) of the organizations reported more volunteers than paid full-time or part-time employees working for their organization. The BALTA social economy survey did not ask respondents to specify the number of volunteer hours worked. However, according to a report from Imagine Canada, 47% of all Canadians aged 15 and over volunteered approximately 2.1 billion hours in 2010 translating to an average of 156 hours per person annually (Lasby, 2012). BC is above the national average with 178 hours average volunteering time per person per year, and AB is lower with 140 hours annual volunteering time per person (Lasby, 2012).

Volunteers: In Alberta, a total of 9929 volunteers were reported by 87 SE organizations in the BALTA survey with a median number of 25.0 volunteers (minimum 1; maximum 2600) per organization. BC organizations reported a median number of 20.0 volunteers (minimum 1; maximum 1581) per organization. Across the 181 organizations reporting volunteer figures, there were 12,453 individuals in volunteer positions (Table 5).

Table 5: Volunteers: provincial percentages and Ns

	Alberta		BC		Total	
	N	%	N	%	N	%
Volunteers						
1 – 5 volunteers	14	16.1	30	16.6	44	16.4
6 – 10 volunteers	15	17.2	28	15.5	43	16.0
11 – 25 volunteers	17	19.5	46	25.4	63	23.5
26 – 50 volunteers	17	19.5	32	17.7	49	18.3
51 – 100 volunteers	11	12.6	13	7.2	24	9.0
100 + volunteers	13	14.9	32	17.7	45	16.8
Totals	87	100	181	100	268	100

Detail notes:

The organizations in Alberta with the highest numbers of volunteer workers were Scouts Canada – Chinook Council (2600), Scouts Canada – Northern Lights Council (1800), and Bissell Centre (1413); in BC organizations with higher numbers of volunteer workers included Abbotsford Community Services (1581), SHARE Family and Community Services Society (875), Vancouver International Film Festival (750), and Immigrant Services Society of BC (600).

While the work of volunteers is a defining characteristic of the social economy, the sector also creates significant paid employment, often targeting marginalized and disadvantaged groups (e.g., people with disabilities and homeless persons). Responding organizations reported a total of 20,096 employees including 12,508 full time and 4506 part time employees, along with numerous seasonal and contract employees. Small organizations dominated the survey population with 81% having 25 or less employees.

Responding organizations reported a total of 20,096 employees including 12,508 full time and 4506 part time employees, along with numerous seasonal and contract employees.

Note that not all participants were able to provide actual numbers of employees. The following summaries are based only on the data that was provided by participants who not only indicated that their organizations employed individuals in various categories, but that also provided a count of the actual numbers employed. As such, the summaries under-estimate the total numbers of people employed in full-time, part-time, seasonal, contract and freelance positions, as well as the number of volunteers in both provinces.

Full-time employment: a total 3096 full-time employees were reported by 108 Alberta SE organizations with a median number of 6.5 full-time employees (minimum 1; maximum 757) per organization. In BC, 235 SE organizations reported a total of 9412 full-time employees with a median number of 5 full-time employees (minimum 1; maximum 2700) per organization (Table 6).

Table 6: Full time (FT) employment: provincial percentages and Ns

FT employees	Alberta		BC		Total	
	N	%	N	%	N	%
1 – 5 employees	49	45.4	125	53.2	174	50.7
6 – 10 employees	20	18.5	28	11.9	48	14.0
11 – 25 employees	17	15.7	39	16.6	56	16.3
26 – 50 employees	10	9.3	13	5.5	23	6.7
51 – 100 employees	5	4.6	13	5.5	18	5.2
100 + employees	7	6.5	17	7.2	24	7.0
Totals	108	100	235	100	343	100

Detail notes: Organizations in Alberta with the highest numbers of FT employees included UFA Co-operative Limited (757) and Excel Resources Society (325); in BC organizations included Vancity Credit Union (2700), Flight Centre Canada (1000) and Thompson River University (500).

Part-time employment: A total 1250 part-time employees were reported by 79 Alberta SE organizations with a median number of 2 part-time employees (minimum 1; maximum 305) per organization. In BC, 196 SE organizations reported a total of 3256 part-time employees with a median number of 2 part-time employees (minimum 1; maximum 240) per organization (Table 7).

Table 7: Part time (PT) employment: : provincial percentages and Ns

	Alberta		BC		Total	
	N	%	N	%	N	%
PT employees						
1 – 5 employees	57	72.2	125	63.8	182	66.2
6 – 10 employees	4	5.1	22	11.2	26	9.5
11 – 25 employees	9	11.4	19	9.7	28	10.2
26 – 50 employees	1	1.3	11	5.6	12	4.4
51 – 100 employees	5	6.3	11	5.6	16	5.8
100 + employees	3	3.8	8	4.1	11	4.0
Totals	79	100	196	100	275	100

Detail notes: Organizations in Alberta with the highest numbers of PT employees included UFA Co-operative Limited (305) and Developmental Disabilities Resource Centre of Calgary (114), and Rosebud School of the Arts (106); in BC organizations included Developmental Disabilities Association (240), Penticton & Area Cooperative Enterprises (180), and Abbotsford Community Services (180).

Seasonal employment: A total 258 seasonal employees were reported by 39 Alberta SE organizations with a median number of 3 seasonal employees (minimum 1; maximum 76) per organization. In BC, 76 SE organizations reported a total of 713 seasonal employees with a median number of 3 seasonal employees (minimum 1; maximum 90) per organization (Table 8).

Table 8: Seasonal employment: provincial percentages and Ns

	Alberta		BC		Total	
	N	%	N	%	N	%
Seasonal employees						
1 – 5 employees	31	79.5	50	65.8	81	70.4
6 – 10 employees	3	7.7	9	11.8	12	10.4
11 – 25 employees	3	7.7	11	14.5	14	12.2
26 – 50 employees	1	2.6	3	3.9	4	3.5
51 – 100 employees	1	2.6	3	3.9	4	3.5
100 + employees	0	--	0	--	0	--
Totals	39	100	76	100	115	100

Detail notes: The organization in Alberta with the highest numbers of seasonal employees was UFA Co-operative Limited (76); in BC organizations with higher numbers of seasonal employees included Vancouver International Film Festival (90), Penticton & Area Cooperative Enterprises (75), UBC School of Music (55), and Tourism Vancouver (50).

Freelance and contract employment: A total 268 individuals were employed in freelance and contract work for 62 Alberta SE organizations with a median number of 2 freelance and contract employees (minimum 1; maximum 24) per organization. In BC, 152 SE organizations reported a total of 1843 individuals employed in freelance and contract work, with a median number of 3 freelance and contract employees (minimum 1; maximum 90) per organization (Table 9).

Table 9: Freelance and contract workers: provincial percentages and Nw.

	Alberta		BC		Total	
	N	%	N	%	N	%
Freelance and contract workers						
1 – 5 workers	48	77.4	108	71.1	156	72.9
6 – 10 workers	9	14.5	14	9.2	23	10.7
11 – 25 workers	5	8.1	15	9.9	20	9.3
26 – 50 workers	0	--	8	5.3	8	3.7
51 – 100 workers	0	--	3	2.0	3	1.4
100 + workers	0	--	4	2.6	4	1.9
Totals	62	100	152	100	214	100

Detail notes: There were no organizations in Alberta with high numbers of freelance and contract workers. BC organizations with higher numbers of freelance and contract workers included Vancouver Opera Association (292), Abbotsford Community Services (125), Immigrant Services Society of BC (125), Rumble Productions (101), and Richmond Gateway Theatre Society (100).

Employment of Target Groups:

In addition to finding out about general employment figures of the SE organizations in Alberta and BC, organizations were asked about the employment of target group members. A total of 318/478 organizations responded to the question “Does your establishment employ specific target groups?” Approximately one third (34%) of these said that they did employ target groups. Slightly more of these responding BC organizations (BC= 36.7%; N = 76) employ target groups than do Alberta organizations (AB=29.7%; N = 33). A total of 1694 members of target groups were employed by 109 SE organizations in AB and BC.

Target groups were diverse and included persons with disabilities, homeless people, women, persons with mental illness, immigrants and those from ethnic minorities. For those organizations in Alberta (N = 33) and in BC (N = 61) who were able to report on the actual numbers of target group members who were employed by their organizations, the totals are summarized in Table 10.

Table 10: Employment of target groups: provincial percentages and Ns

	Alberta		BC		Total	
	N	%	N	%	N	%
Target group employees						
1 – 5 employees	12	37.5	26	42.6	38	40.9
6 – 10 employees	6	18.8	9	14.8	15	16.1
11 – 25 employees	9	28.1	15	24.6	24	25.8
26 – 50 employees	4	9.4	4	6.6	8	7.5
51 – 100 employees	2	6.3	4	6.6	6	6.5
100 + employees	0	--	3	4.9	3	3.2
Totals	33	100	61	100	94	100

Detail notes: The organizations in Alberta with the highest numbers of target group employees were Alberta Retired Teachers Association (90), and Kids in the Hall Bistro Program (70); in BC organizations with higher numbers of target group employees included, Immigrant Services Society of BC (200), Penticton & Area Cooperative Enterprises (187), Sea to Sky Community Services Society (130) Career Development Services an agency of Trail Association for Community Living (76).

Alberta SE organizations showed a median number of 8.5 employees from targeted groups (minimum 1; maximum 90) per organization. The 33 organizations reporting target group employee figures had a total of 454 (sum of the distribution) targeted individuals employed across the province.

BC organizations showed a median number of 7 employees from targeted groups (minimum 1; maximum 200) per organization. The 61 organizations reporting target group employee figures had a total of 1240 (sum of the distribution) targeted individuals employed.

Fewer organizations were able to report on the gender make-up of target employees (N=84). A total of 337 targeted females were employed in the 31 Alberta SE organizations that responded to this question, and BC had 842 targeted women employed in the 53 organizations reporting. Alberta SE organizations show a median number of 6 female employees from targeted groups (minimum 0; maximum 50) per organization. BC organizations show a median number of 5 female employees from targeted groups (minimum 1; maximum 170) per organization (Table 11).

Table 11: Employment of females from target groups: provincial percentages and Ns

Female target group employees	Alberta		BC		Total	
	N	%	N	%	N	%
None	1	3.2	4	7.5	5	6.0
1 – 5 employees	14	45.2	24	45.3	38	45.2
6 – 10 employees	7	22.6	10	18.9	17	20.2
11 – 25 employees	6	19.4	7	13.2	13	15.5
26 – 50 employees	3	9.7	4	7.5	7	8.3
51 – 100 employees	0	--	2	3.8	2	2.4
100 + employees	0	--	2	3.8	2	2.4
Totals	31	100	53	100	84	100

Detail notes: There were no organizations in Alberta with high numbers of female workers from targeted groups. BC organizations with higher numbers of female targeted group employees included Immigrant Services Society of BC (170), Penticton & Area Cooperative Enterprises (77), and Sea to Sky Community Services Society (130) and Career Development Services an agency of Trail Association for Community Living (60).

Financial Profile

The financial contributions of SE organizations in Alberta and British Columbia are significant. Operating budgets reported by SE organizations in the two provinces totaled over \$638 million (N=381; 80%), while the capital budgets exceeded \$1.19 billion (N=142; 30%). Note that only 77% (N = 123) of participants responding for Alberta organizations and 80% (N = 258) of BC participants were able to provide fiscal information about their organization’s actual operating budget. Fewer Alberta (39%; N = 62) and BC (26%; N = 80) participants were able to provide dollar amounts to describe their organization’s actual capital budgets. As such, the sums provided underestimate the total dollar amounts that are related to Alberta and BC SE organizations who responded to this survey. And while implicit, it is good to recall that it even more under-reports total finances for the sector. This is true in terms of actual operating budgets, but especially so in terms of actual capital budgets. It is also important that we note the budget figures were collected from organizations for a single year, which may have been either 2008 or 2009 depending on when the survey was completed. Budget information from either year was treated the same in analysis.

Operating budgets reported by SE organizations in the two provinces totaled over \$638 million (N=381; 80%), while the capital budgets exceeded \$1.19 billion (N=142; 30%).

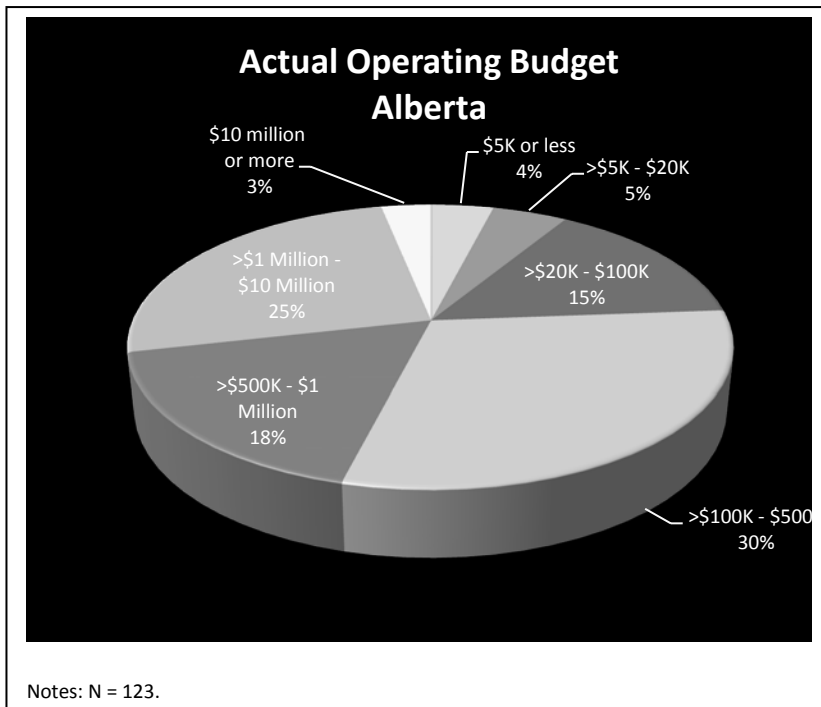
Median figures (mid-point of the distribution) and sums (total across all organizations) are provided in Table 12. Median operating budgets for both Alberta (range = \$900 - \$48.5 million) and BC (range = \$950 - \$24.4 million) organizations were calculated at \$400,000. Within the provinces, Alberta and BC organizations show total operating budgets of \$209.6 million and \$428.8 million respectively; and capital budgets of \$212.6 million and \$978.4 million, respectively.

Table 12: Operating and capital budgets in \$: provincial median and total

Actuals	Alberta			BC		
	N	Median	Sum	N	Median	Sum
Operating Budget	123	400,000	209.6 Million	258	400,000	428.8 Million
Capital Budget	62	89,000	212.6 Million	80	56,500	978.4 Million

Detail notes: In Alberta, organizations reporting the largest operating budgets (greater than \$10 million) included Developmental Disabilities Resource Centre of Calgary, Westlock Terminals Ltd., The Mustard Seed Calgary Street Ministry, and Excel Resources Society; in BC, organizations reporting the largest operating budgets included Emily Carr Institute, Abbotsford Community Services, Developmental Disabilities Association, Tourism Vancouver, Menno Home/Menno Hospital, and Communitas Supportive Care Society. In Alberta, organizations reporting the largest capital budgets (greater than \$10 million) included Edmonton Community Foundation, KAIROS Calgary

Homeless & Affordable Housing Working Group, and Excel Resources Society; in BC, organizations reporting the largest capital budgets included Vancouver Foundation, Vancity Community Foundation, More than A Roof – Mennonite Housing Society, and Columbia Basin Trust (CBT) – Cranbrook.



It is important to recognize the distinction between funding bodies, such as foundations, hybrids like Columbia Basin Trust, and operational agencies like Mennonite Housing. Funders may have large budgets but have small program footprints, and small operational budgets. And the funds they distribute are then reported and used as operational budgets by other organizations, including some of

Figure 15: Actual operating budget: Alberta ranges

pick up this level of detail at the case study level in other BALTA projects.

The available budget data is summarized further in the figures below. These graphs provide visual images of the proportion of organizations with operating and capital budgets within specific dollar categories (i.e., less than \$5K up to more than

those in our sample. We try to

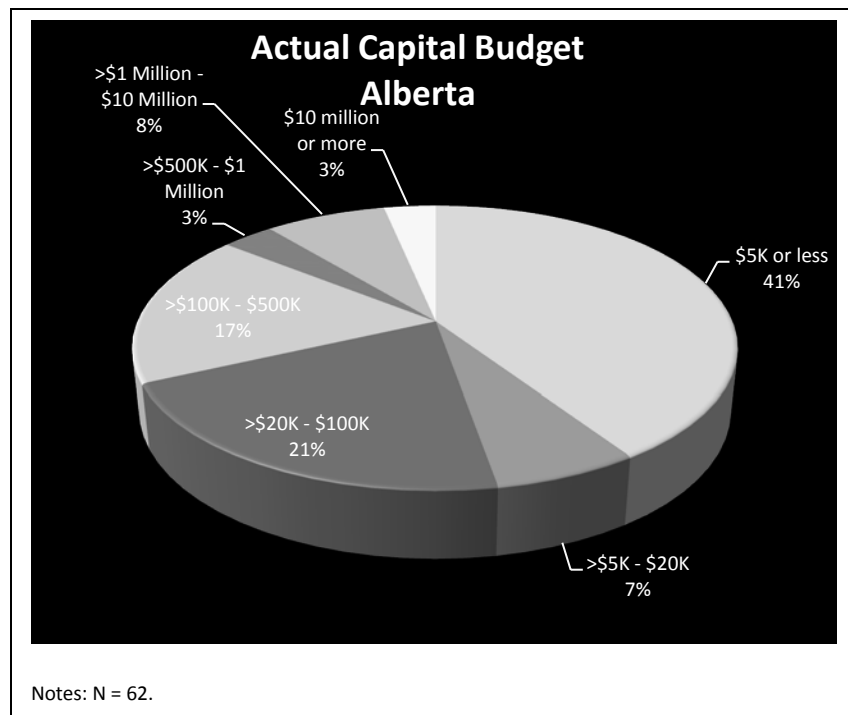


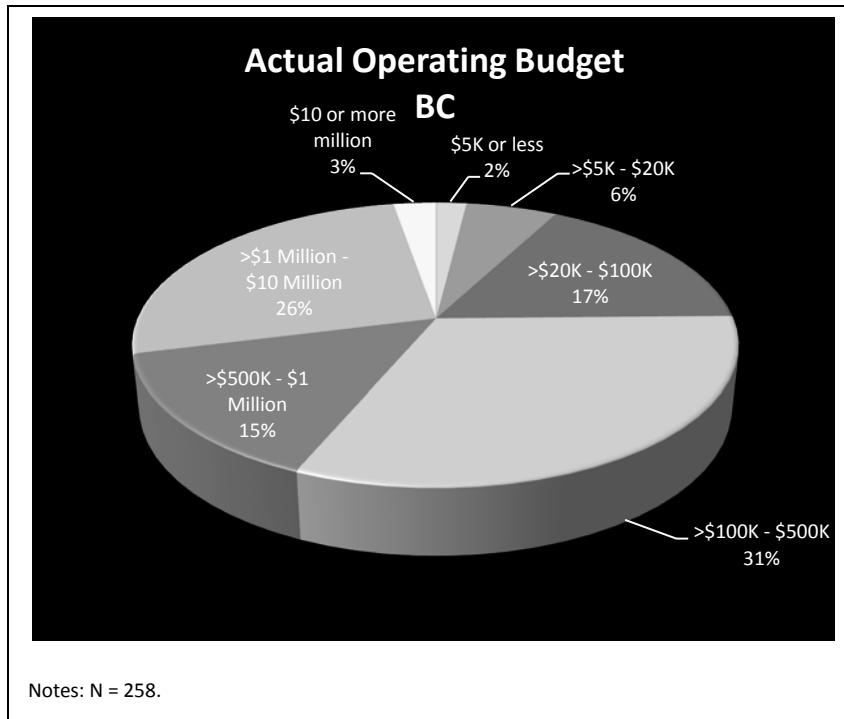
Figure 16: Actual capital budget: Alberta ranges

\$10 million).

The largest proportions of Alberta SE organizations surveyed (and who could also provide budget information) fell within the categories described by operating budgets in the \$100,000 to \$500,000 range (30%; N = 38), and the \$1,000,000 to \$10,000,000 (25%; N = 32) range (Figure 15).

The largest proportions of Alberta SE organizations surveyed (and who could also provide capital budget information) fell within the categories described by capital budgets in the \$1 - \$5,000 range (41%; N = 37), and the \$20,000 to \$100,000 (21%; N = 19) range (Figure 16).

Similarly in BC, the largest proportions of SE organizations surveyed (and who could also provide



operating budget information), fell within the \$100,000 to \$500,000 range (31%; N = 82), and the \$1,000,000 to \$10,000,000 (26%; N = 68) range (Figure 18).

In regards to actual capital budgets, the largest proportions of BC SE organizations surveyed (and who could also provide budget information) fell within the \$1 to \$5,000 range (55%; N = 85).

Figure 18: Actual operating budget: BC ranges

Another 38% of BC

organizations were evenly distributed among three other capital budget categories, \$5,000 to \$20,000 range (12%, N = 19), \$20,000 to \$100,000 range (13%, N = 20), and \$100,000 to \$500,000 range (13%, N = 20). See Figure 17.

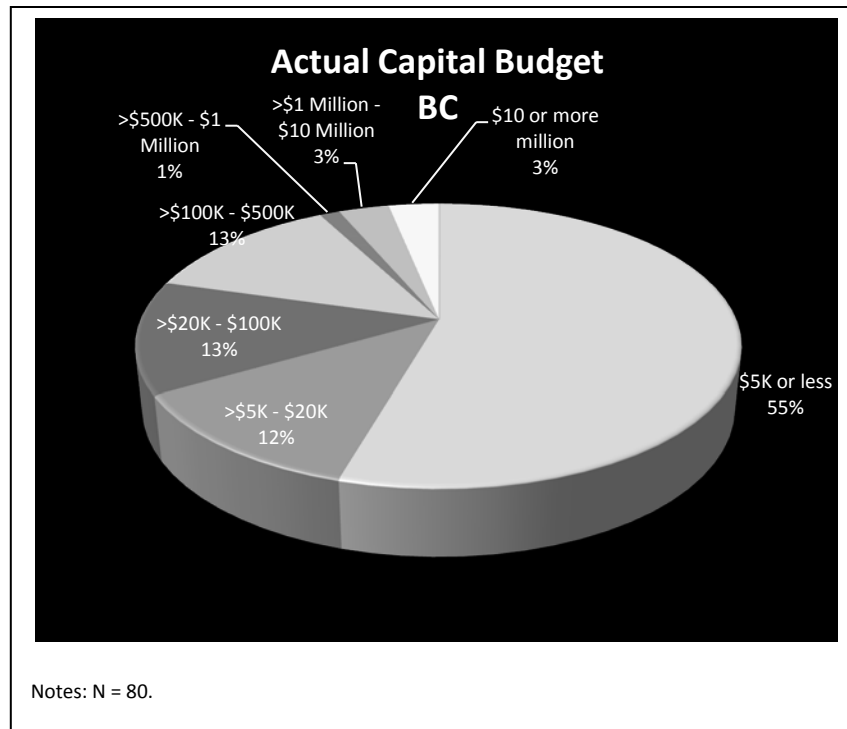


Figure 17: Actual capital budgets: BC ranges

Sources of Revenue

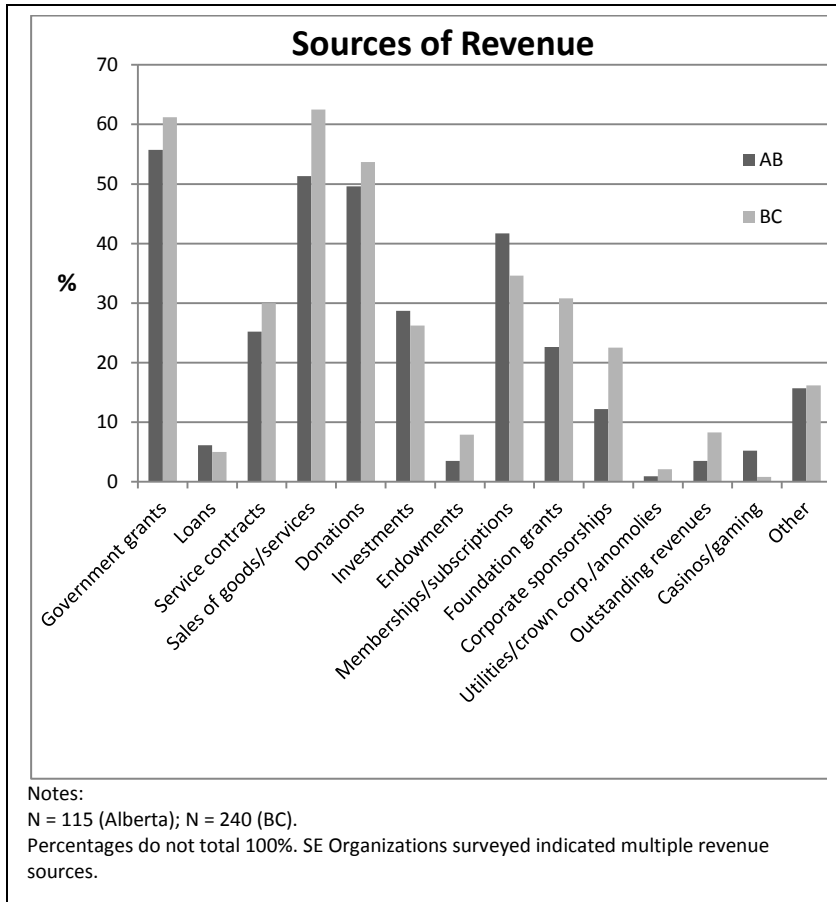
In order to gain information about sources of revenue for Alberta and BC SE organizations, survey participants were asked “for the last fiscal year, please indicate your organization’s total revenues from the following areas” which included government grants, loans, service contracts, investments, etc. Most SE organizations depended on many different sources of revenue. Almost 67% of SE organizations earned at least a portion of their income through market-based activities, and most frequently these activities involved services, sales, and other business activity.

Almost 67% of SE organizations earned at least a portion of their income through market-based activities, and most frequently these activities involved services, sales, and other business activity.

Not all respondents were able to provide detailed revenue information. Respondents for 115/159 Alberta and 240/319 BC organizations provided revenue information in one or more of the categories noted in Figure 19. For this group of participants, if one or more categories were filled in but other categories were left blank, an assumption was made that the blank categories represented \$0. Participants were not given the option, in responding to this question, to indicate that they were aware of receiving income from a particular source but were unable to specify the exact (or estimated) amount. Where participants were unable to provide revenue information for any of the categories, their cases were treated as “missing” for these analyses (N = 43 Alberta; N = 73 BC). Given the number of missing cases, the summary below likely underestimates the number of SE organizations receiving income from the various sources.

Respondents were given a list of 12 categories (the first 12 items, from left to right, seen in Figure 19) with which to outline their revenue sources. Participants were also given the opportunity to identify “Other” sources not provided in the list. A small proportion (5% Alberta; 1% BC) used this category to identify revenues from casinos and gaming activities, and this was added as a separate category in the summary figure.

Figure 19 shows that for Alberta and BC SE organizations, the most frequent sources of revenues noted



were the sales of goods and services (51% and 62% respectively), government grants (56% and 61%), donations (50% and 54%), and memberships and subscriptions (42% and 35%).

From the information provided by the SE organizations we were also able to calculate total dollar amounts of revenue from each source. Table 13 provides a summary of revenues for those participants including an amount greater than zero in one or more of the revenue categories. Again, their totals likely underestimate the

Figure 19: Sources of revenue: provincial percentages

amount of revenue received from each source. For each revenue category, median revenue figures as well as sums of revenues for Alberta and BC organizations are given. Table 17 and Table 18 (Appendix II) further explore revenue data for Alberta and BC organizations by grouping revenue data into eight discrete categories (i.e., less than \$5K to more than \$10 million).

Table 13: Sources of revenue: provincial median and sum total

	Alberta			BC		
	N	Median	Sum	N	Median	Sum
SALES REVENUE						
Service contracts	29	100,000	27.2 Million	72	160,100	77.8 Million
Sales of goods/ Services	59	53,013	1.9 Billion	150	78,000	71.7 Million
Memberships/ subscriptions	48	5,000	10.4 Million	83	3928	3.2 Million
SUBTOTAL			1.94 Billion			152.7 Million
SOURCES OF FINANCE						
Donations	57	40,000	55.4 Million	129	20,000	74.3 Million
Government grants	64	112,278	45.0 Million	147	140,000	117.1 Million
Investments	33	9,265	2.2 Million	63	9,734	73.9 Million
Loans	7	150,000	20.6 Million	12	74,000	23.5 Million
Endowments	4	7,000	.4 Million	19	12,947	4.1 Million
Foundation grants	26	67,000	5.9 Million	74	22,123	6.2 Million
Corporate sponsorship	14	20,000	1.5 Million	54	13,500	3.8 Million
Utilities/crown corporations	1	40,000	.04 Million	5	46,500	.2 Million
Outstanding revenues/ anomalies	4	25,527	.1 Million	20	13,183	1.3 Million
Casinos/gambling	5	59,714	.4 Million	2	60,000	.1 Million
Other	18	17,087	5.7 Million	39	26,596	64.3 Million
SUBTOTAL			137.2 Million			368.8 Million

Detail note: UFA, an agricultural coop in Alberta reported sales revenue of \$1.6 billion.

Total Revenues from all Sources

A total revenue figure was calculated for each organization by summing the dollar amounts from each of the categories noted in Table 13 above (i.e., government grants, loans, service contracts, sale of goods/services, donations, investments, endowments, membership/subscriptions, foundation grants, corporate sponsorship, utilities/Crown corporations, anomalies/outstanding revenues,

casinos/gambling, and other) . Only those organizations who provided revenue information for one or more of the categories noted above were included in the analysis (N = 355)³.

Table 14: Total revenues: provincial median and sum

Revenues	Alberta			BC		
	N	Median	Sum	N	Median	Sum
Total Revenues	115	403,000	2.1 Billion	240	378,800	521.5 Million

Detail notes: Alberta organizations reporting revenues in excess of 10 million dollars included UFA Co-operative Limited, Mountain Equipment Co-op, Edmonton Community Foundation, Barrhead & Districts Co-op Ltd., and Excel Resources Society.

BC organizations reporting revenues in excess of 10 million dollars included, Law Foundation of BC, Abbotsford Community Services, Tourism Vancouver, Vancouver Foundation, Investment Agriculture Foundation of BC, Vancity Community Foundation, Developmental Disabilities Association, Columbia Basin Trust – Cranbrook, Immigrant Services Society of BC, Menno Home/Menno Hospital, and Communitas Supportive Care Society.

Figure 20 shows the proportions of Alberta organizations with total revenues within various ranges. The largest proportions of Alberta SE organizations surveyed (and who could also provide revenue information) reported revenues between \$100K and \$500K (27%) and between \$1 million and \$10 million (24%). Similar proportions of organizations reported revenues between \$500K - \$1 million (17%) and

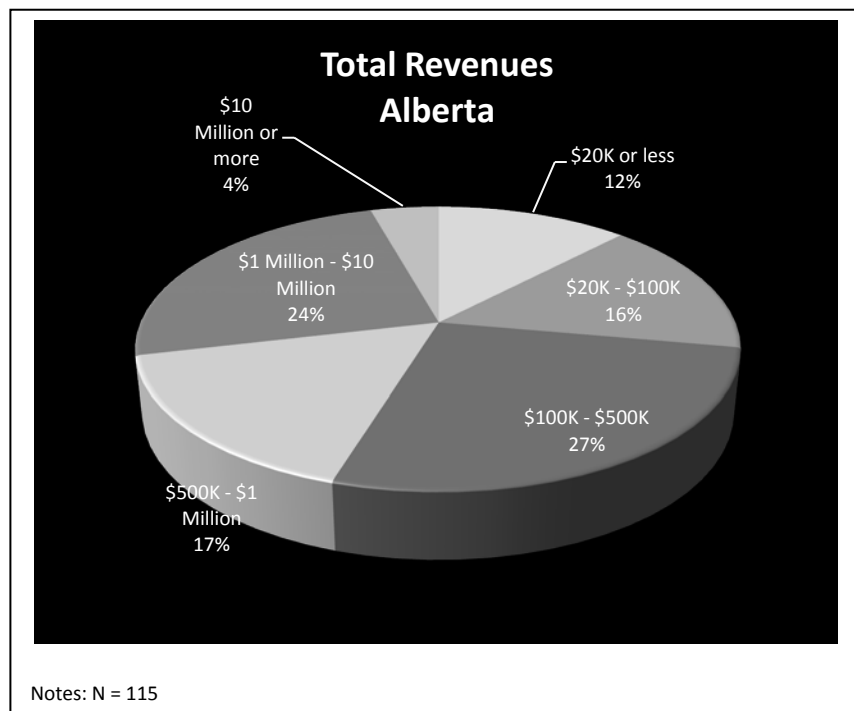


Figure 20: Total revenue: Alberta ranges

³ Again, for this group, where a specific category was left blank, zero revenue dollars were assumed for the category. Participants were not given the option of indicating that their organization received revenue from a particular source, but that they were also unaware of the exact (or estimated) dollar amount from the source. Because we have no way of knowing that a blank entry was intended to signify \$0 revenues (some participants did in fact enter \$0 dollars for revenue categories that did not apply to them) the results of these descriptive analyses should be interpreted with caution. It is likely that the total revenues figures provided in Table 14, underestimate the organizations' true total revenues.

\$20K - \$100K (16%).

The SE organizations in BC demonstrated similar revenue patterns. As seen in Figure 21, the largest proportions of BC SE organizations surveyed (and who could also provide revenue information) reported revenues between \$100K and \$500K (33%) and between \$1 million and \$10 million (23%).

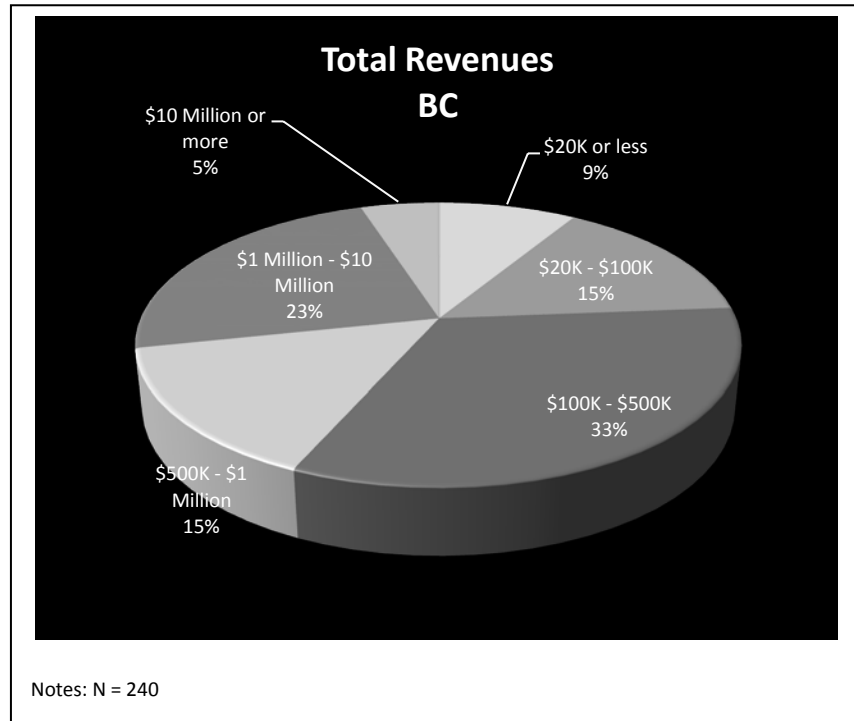
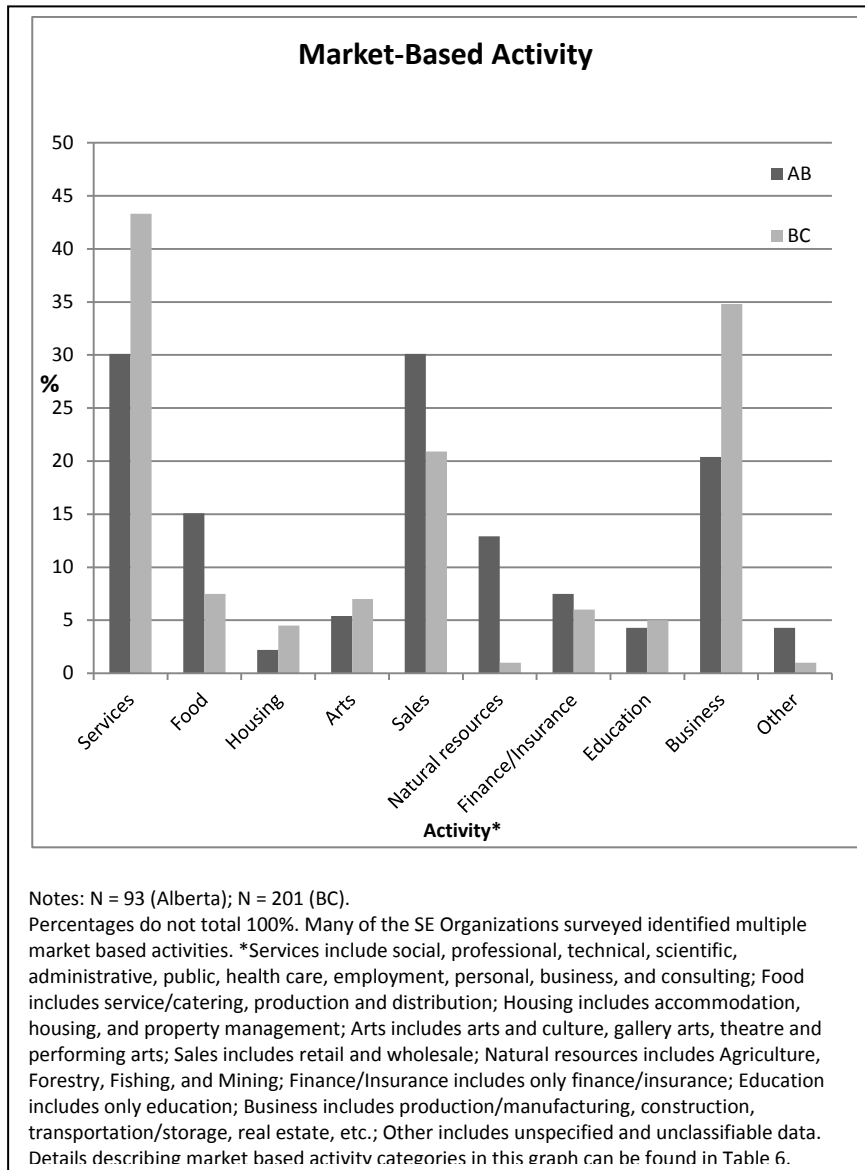


Figure 21: Total revenue: BC ranges

Similar proportions of organizations had revenues between \$500K - \$1 million (15%) and \$20K - \$100K (15%).

Market Activity

SE organizations in Alberta and BC participated in a number of market based activities. When the earned revenue from market based activities are considered to be service contracts (\$105 million), the sales of goods and services (\$1.97 billion), and membership and subscriptions (\$13.6 million), SE organizations in AB and BC earned over \$2.09 billion from market activities.



Provincially, 58.5% (N = 93) of Alberta and 63% (N = 201) of BC SE organizations earned at least a portion of their income through market-based or business activity.

Figure 22 provides a summary of the proportion of organizations in Alberta and BC who reported involvement in a variety of market based activities⁴. The most frequent market based activities in which Alberta and BC organizations participated were services (30% and 43% respectively), sales (30% and 21%), and business (20% and 35%).

Figure 22: Market based activities: provincial percentages

⁴ This may not be as clear as presented. Several social enterprises, for example, running restaurants to train and employ people with disabilities might, depending on the interpretation of the people answering the questionnaire, put themselves down as services, food, sales, education or business, yet be identical in how they function while showing up in your table as several distinct types.

Table 15 provides a detailed account of the types of market-based activity reported by the SE organizations surveyed in Alberta and BC. Note that the work sector groupings in Table 15 were used to inform the categories seen in Figure 22.

Table 15: Market based activities: provincial/total percentages and Ns

	Alberta		BC		Total	
	%	N	%	N	%	N
Work Sector						
Agriculture, forestry, fishing, mining	12.9	12	1.0	2	4.8	14
Finance/insurance	7.5	7	6.0	12	6.5	19
Arts						
Arts and culture	2.2	2	3.0	6	2.7	8
Gallery arts	3.2	3	4.0	8	3.7	11
Theatre and performing arts	2.2	2	12.4	25	9.2	27
Food						
Service/catering	8.6	8	2.5	5	4.4	13
Production	2.2	2	<1	1	1.0	3
Distribution	4.3	4	4.5	9	4.4	13
Housing						
Accommodation	--	0	<1	1	<1	1
Housing	2.2	2	3.5	7	2.1	9
Property management	--	0	<1	1	<1	1
Sales						
Retail	28.0	26	20.4	41	22.8	67
Wholesale	2.2	2	<1	1	1.0	3
Services						
Social	1.1	1	1.5	3	1.4	4
Professional	2.2	2	<1	1	1.0	3
Technical/scientific	6.5	6	8.0	16	7.5	22
Administrative	6.5	6	2.5	5	3.7	11
Public administration	--	0	1.0	2	<1	2
Health care	1.1	1	2.5	5	2.0	6
Employment	2.2	2	2.5	5	2.4	7
Personal	5.4	5	1.5	3	2.7	8
Business	4.3	4	10.4	21	8.5	25
Consulting	--	0	1.5	3	1.0	3
Education	4.3	4	5.0	10	4.8	14
Business						
Production/Manufacturing	1.1	1	<1	1	<1	2
Construction	--	0	--	0	--	0

Transportation/storage	--	0	1.5	3	1.0	3
Real estate	7.5	7	7.5	15	7.5	22
Communications	1.1	1	--	0	<1	1
Waste management	2.2	2	2.0	4	2.0	6
Recreation/tourism	--	0	1.5	3	1.0	3
Day care	2.2	2	4.5	9	4.4	13
Janitorial/cleaning	1.1	1	2.0	4	1.7	5
Landscaping/gardening	--	0	1.5	3	1.0	3
Movers/hauling	--	0	--	0	--	0
Printing	--	0	1.5	3	1.0	3
Repair/maintenance	--	0	--	0	--	0
Sewing	--	0	--	0	--	0
Other						
Unclassifiable	4.3	4	1.0	2	2.0	6
Unspecified	4.3	4	6.5	13	5.8	17

Notes: N= 93 Alberta; column % reflect proportion of the 93 organizations specifying a particular market based activity. Given that organizations could specify more than one activity, column Ns total greater than 93 and column %s add up to more than 100%.

N = 201 BC; column % reflect proportion of the 201 organizations specifying a particular market based activity. Given that organizations could specify more than one activity column Ns total is greater 201 and column %s add up to more than 100%.

N = 294 Total (Alberta and BC combined); column % reflect proportion of the 294 organizations specifying a particular market based activity. Given that organizations could specify more than one activity column Ns total is greater than 294 and column %s add up to more than 100%.

Profit Distribution

A final characteristic used by BALTA to define a social economy organization was the ways in which profits are distributed. Our criteria outlines that SE organizations should reinvest surpluses back into the community, or into the organization/enterprise for the purposes of achieving social/environmental goals. To explore this measure, survey participants were asked “Typically, if your organization generates a financial surplus or profit, how does it distribute most of the surplus earned?” Not all organizations

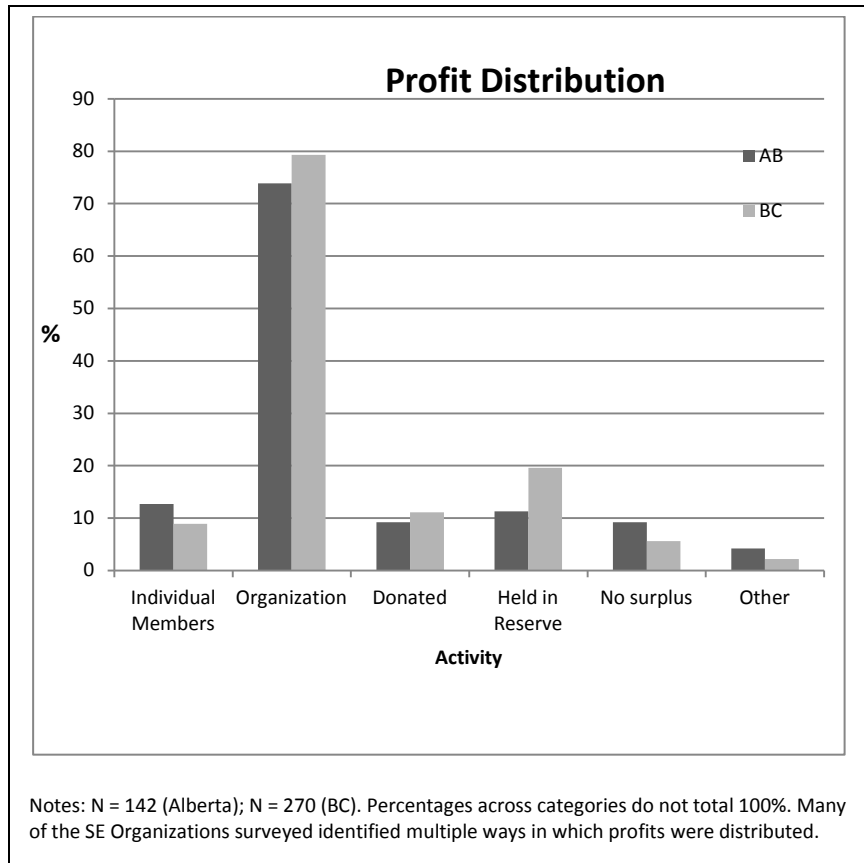


Figure 23: Profit distribution methods: provincial percentages

responded to this question (89%, N = 142 Alberta; 85%, N= 270 BC). Figure 23 summarizes, for each province, the ways in which organizations managed their distribution of profits.

The survey gave participants four alternatives from which to describe the ways in which their organizations distributed profits, as well as an “Other” category. A small proportion of participants in each province (4%) used this

“Other” category to indicate that their organizations had

“no surplus” (e.g., “work on a balanced budget,” “no profits,” “never had a surplus”).

The largest proportion of organizations indicated that they invested their profits back into their organizations (74% and 79% AB and BC respectively); another 9% (AB) and 11% (BC) donated to other community organizations; and 11% (AB) and 20% (BC) held monies in reserve for community benefit/community trust (Figure 23). In contrast, a minority of Alberta and BC organizations indicated that profits were distributed to individual members (13% and 9% respectively). These numbers correspond

closely with the number of organizations identifying their structure as a cooperative (16% AB and 8% BC).

Concluding Comments

Social economy organizations in Alberta and BC are diverse. This survey represents the first attempt to provide a portrait of these organizations - the scale and scope of their work. Other work has been done by BALTA team members, see for example the initial profile of this sector in Alberta and BC provided by Sousa & Hamdon, (2008). While this mapping paper has provided a rich tapestry of information describing the broad social economy in Alberta and British Columbia, Peter Elson and Peter Hall have done more focused work on Social Enterprises in the two provinces (2010). Their survey work has provided important insights into the strength, size and scope of this important subgroup of the Social Economy. Most recently, they have expanded their survey into Manitoba, and working with the Canadian CED Network, have published a paper describing the Social Enterprise sector in this province as well (O'Connor, Elson, Hall, & Reimer, 2012). Important work continues throughout Canada building on the critical network of regional partnerships established through the Canadian Social Economy Research Partnerships (CSERP) funded by the Social Sciences and Humanities Research Council of Canada (SSHRC). Interested parties are invited to visit the BALTA website at www.socialeconomy-bcalberta.ca.

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Appendices

Appendix I: Key Points of Comparison by Province

Table 16: Key points of comparison by province

		Alberta	British Columbia	Both Provinces
Organizational Structure				
Age	Q 6 ¹	28.7 years	25.9 years	
Legal form	Q 11			
Not for profit organization		47%	50%	
Society		30%	34%	
Not for profit corporation		16%	13%	
Co-operative		16%	8%	
Charity		7%	11%	
For profit corporation		6%	10%	
Association		4%	2%	
Foundation		3%	4%	
Other		3%	4%	
Membership base (N=316) ²	Q 9			66%
Members: median (N= 297)		135	126	
Less than 500 members: organizations		78%	83%	
Board of directors (N=447)	Q 10			
Directors: median		9	9	
Representativeness: directors: members				
Women directors: median (N=440)		3.5	4	
Geographic Range Serviced				
Neighborhood	Q 8	25%	33%	
City / town		41%	46%	
Region		48%	51%	
Province		28%	25%	
National		13%	14%	
International		8%	9%	
Support for other organizations				
Organizations	Q 17	76%	72%	73%
Type				
Networking		63%	65%	
Advocacy and promotion		55%	52%	
Training		50%	47%	
Capacity building		43%	60%	
Research and education		39%	37%	
Financial		32%	35%	
Organizational development		31%	40%	
Technical		28%	33%	

Enterprise development		12%	23%	
Other		4%	4%	
Purpose and Mission				
Social mission (N=419)	Q 13	84%	90%	88%
Activity				
Education		43%	29%	
Basic needs provision		36%	16%	
Health		32%	15%	
Housing		29%	20%	
Human rights		24%	12%	
Family services		21%	13%	
Legal/financial services		10%	6%	
Fair trade		8%	5%	
Environment		4%	4%	
Social/economic development		2%	3%	
Arts and culture		1%	10%	
Other		3%	2%	
Target groups served				
General community		44%	37%	
Children/youth		38%	21%	
Lower income individuals		31%	24%	
Indigenous people		29%	16%	
Persons with disabilities		27%	27%	
Homeless persons		27%	16%	
Women		24%	19%	
Persons with mental illness		23%	20%	
Unemployed persons		23%	20%	
Elderly persons		20%	17%	
Ethnic communities		19%	11%	
Refugees	Refugees	17%	5%	
Other		-	1%	
Environmental mission (N=124)				
	Q 14	30%	24%	26%
Activity				
Conservation and protection		55%	46%	
Resource management		49%	34%	
Health		40%	18%	
Pollution prevention		38%	29%	
Agriculture and food		38%	26%	
Alternative energy		38%	18%	
Climate change		36%	27%	
Alternative business practices		34%	44%	
Waste management/recycling		30%	29%	
Transportation		21%	16%	
Research/independent science		19%	13%	

Ecolabeling/auditing/monitoring		15%	8%	
Green building/architecture		13%	22%	
Legal/financial services		4%	7%	
Sustainability		4%	10%	
Education		2%	6%	
Other		4%	4%	
Primary Work Sectors				
Services	Q 12	42%	41%	41%
Agriculture, forestry, fishing, mining		15%	4%	8%
Housing		10%	7%	8%
Environment		8%	5%	6%
Education and training		8%	5%	6%
Sales (retail and wholesale)		6%	2%	4%
Arts and culture		4%	24%	17%
Finance and insurance		4%	8%	7%
Business (manufacturing, construction, transportation/storage, real estate, catering/hosting, communications, waste management, recreation/tourism)		3%	4%	4%
Human Resources				
Volunteers: total/median (N=268)	Q 15	9929/25	12,453/20	
Full-time employees: total/median (N=343)		3096/6.5	9412/5	12,508
Part-time employees: total /median (N=275)		1250/2	3256/2	4506
Seasonal employees: total/median (N=115)		258/3	713/3	971
Freelance and contract: total/median (N=214)		268/2	1843/3	2111
Target group members: total/median (N=93)	Q 16	454/8.5	1240/7	1694
Financial Profile				
Operating budget: total (N=123 in AB and N=258 in BC)	Q 19	\$209.6 Million	\$428.8 Million	\$638.4
Operating budget: median (N=123 in AB and N=258 in BC)		\$400,000	\$400,000	
Capital budget: total (N=62 in AB and N= 80 in BC)		\$212.6 Million	\$978.4 Million	\$1.19 Billion
Total revenue (N=115 in AB and N=240 in BC)	Q 20	\$2.1 Billion	\$521.5 Million	\$2.62 Billion
Sales revenue				
Service contracts		\$27.2 Million	\$77.8 Million	
Sales of goods/services		\$1.9 Billion	\$71.7 Million	

Memberships/subscriptions		\$10.4 Million	\$3.2 Million	
Sources of finance				
Government grants		\$45.0 Million	\$117.1 Million	
Donations		\$55.4 Million	\$74.3 Million	
Investments		\$2.2 Million	\$73.9 Million	
Loans		\$20.6 Million	\$23.5 Million	
Endowments		\$0.4 Million	\$4.1 Million	
Foundation grants		\$5.9 Million	\$6.2 Million	
Corporate sponsorship		\$1.5 Million	\$3.8 Million	
Utilities/crown corporations		\$0.04 Million	\$0.2 Million	
Outstanding revenues/anomalies		\$0.1 Million	\$1.3 Million	
Casino/gambling		\$0.4 Million	\$0.1 Million	
Other		\$5.7 Million	\$64.3 Million	
Market-Based Activity				
		Q 16		
Earn revenue (N=294)		58.5%	63%	
Activity				
Services		30%	43%	
Sales		30%	21%	
Business		20%	35%	
Food		15%	8%	
Natural resources		13%	1%	
Finance/insurance		8%	6%	
Arts		5%	7%	
Education		4%	5%	
Housing		2%	5%	
Other		4%	1%	
Profit Distribution (N=412)				
		Q 18		
Invested back into organization		74%	79%	
Distributed to members		13%	9%	
Held in reserve		11%	20%	
Donated to other community organizations		9%	11%	
No surplus		9%	6%	
Other		4%	2%	

¹ "Q" refers to the question number from the BALTA Social Economy Survey, Appendix IV

² Unless otherwise stated, the N, or number of respondents, for any particular question was the entire survey population, or 478 respondents

Appendix II: Summary of Revenue Data by \$\$ Categories

Table 18 and Table 18 further explore revenue data for Alberta and BC organizations by grouping revenue data into eight discrete categories (i.e., less than \$5K to more than \$10 million). Only those organizations reporting income in at least one of the activities noted in Table 13 were included in the categorical summaries (N = 115 Alberta; N = 240 BC). Similar to the discussion for Figure 19 about missing data, the first category “None” includes those organizations that either reported \$0 or left the category blank.

Table 17: Sources of revenue: Alberta

Revenue Source	None		<5K		5K to <20K		20K to < 100K		100K to < 500K		500K to <1 mil.		1 mil. to <10 mil.		> 10 mil.	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Government grants	51	44.3	3	2.6	5	4.3	23	20.0	16	13.9	6	5.2	11	9.6	0	--
Loans	108	93.9	0	--	2	1.7	1	.9	1	.9	0	--	2	1.7	1	.9
Service contracts	86	74.8	2	1.7	2	1.7	12	10.4	7	6.1	2	1.7	3	2.6	1	.9
Sales of goods/ services	56	48.7	9	7.8	9	7.8	14	12.2	11	9.6	7	6.1	6	5.2	3	2.6
Donations	58	50.4	8	7.0	16	13.9	15	13.0	10	8.7	2	1.7	5	4.3	1	.9
Investments	82	71.3	12	10.4	10	8.7	8	7.0	2	1.7	0	--	1	.9	0	--
Endowments	111	96.5	2	1.7	1	.9	0	--	1	.9	0	--	0	--	0	--
Memberships/ subscriptions	67	58.3	25	21.7	4	3.5	9	7.8	5	4.3	2	1.7	3	2.6	0	--
Foundation grants	89	77.4	2	1.7	7	6.1	5	4.3	8	7.0	2	1.7	2	1.7	0	--
Corporate sponsorship	101	87.8	5	4.3	3	2.6	2	1.7	3	2.6	1	.9	0	--	0	--
Utilities/crown corporations	114	99.1	0	--	1	.9	0	--	0	--	0	--	0	--	0	--
Outstanding revenues/ anomalies	111	96.5	1	.9	1	.9	2	1.7	0	--	0	--	0	--	0	--
Casinos/gambling	109	94.8	0	--	1	.9	3	2.6	2	1.7	0	--	0	--	0	--
Other	97	84.3	3	2.6	6	5.2	3	2.6	3	2.6	1	.9	2	.7	0	--

Note: N = 115. Row Ns total 115; Row % total 100%.

Table 18: Sources of revenue: BC

Revenue Source	None		<5K		5K to <20K		20K to <100K		100K to <500K		500K to <1 mil.		1 mil. to <10 mil.		> 10 mil.	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Government grants	93	38.8	8	3.3	16	6.7	44	18.3	46	19.2	12	5.0	20	8.3	1	0.4
Loans	228	95.0	1	.4	1	.4	5	2.1	0	--	1	.4	1	.4	0	--
Service contracts	168	70.0	10	4.2	4	1.7	19	7.9	12	5.0	13	5.4	12	5.0	2	.8
Sales of goods/ services	90	37.5	14	5.8	24	10.0	45	18.8	38	15.8	17	7.1	12	5.0	0	--
Donations	111	46.3	35	14.6	32	13.3	39	16.3	16	6.7	4	1.7	1	.4	2	.8
Investments	177	73.8	24	10.0	16	6.7	10	4.2	5	2.1	1	.4	5	2.1	2	.8
Endowments	221	92.1	5	2.1	7	2.9	1	.4	1	.4	5	2.1	0	--	0	--
Memberships/ subscriptions	157	65.4	46	19.2	12	5.0	17	7.1	7	2.9	1	.4	0	--	0	--
Foundation grants	166	69.2	19	7.9	15	6.3	25	10.4	13	5.4	1	.4	1	.4	0	--
Corporate sponsorship	186	77.5	14	5.8	19	7.9	13	5.4	7	2.9	1	.4	0	--	0	--
Utilities/crown corporations	235	98.3	1	.4	0	--	3	1.3	1	.4	0	--	0	--	0	--
Outstanding revenues/ anomalies	220	91.7	6	2.5	6	2.5	4	1.7	3	1.3	1	.4	0	--	0	--
Casinos/gambling	238	99.2	0	--	0	--	2	.8	0	--	0	--	0	--	0	--
Other	201	83.8	9	3.8	8	3.3	10	4.2	6	2.5	1	.4	4	1.7	1	.4

Note: N = 125; Row Ns total 125; Row % total 100%.

Appendix III: Number of establishments - detail

For those organizations in Alberta who indicated more than one organizational unit and who could also specify an exact count (N = 26), the median number of units calculated was equal to 4.5 (range 2 to 500 units). For this small group, a total of 764 units were counted in the province (i.e., sum of the distribution). Organizations with the largest number of units in Alberta include, for example, Scouts Canada – Chinook Council (500 units); Pincher Creek Feeders Association Ltd. (62 units); and Community Futures (59 units).

For those organizations in BC who indicated more than one unit and who could also specify an exact count (N = 41), the median number of units calculated was equal to 4 (range 2 to 65). For this small group, a total of 390 units were counted in the province (i.e., sum of the distribution). Organizations with the largest number of units in BC include, for example, Vancity Credit Union (65 units); and Dr. Stuart Pavillion Residential Services (45 units).

Appendix IV: Survey Questions

BALTA Social Economy Survey Questions (Abbreviated Format)

- Q1 – Q5: Organization name and contact information.
- Q6: Incorporation/Constitution year
- Q7: Web address
- Q8(a): Does your organization have more than one establishment in Alberta and/or BC?
- Q8(b): What geographic area does your establishment serve?
- Q9: Does your establishment have a membership base?
- Q10: How many persons are on your organization's board of directors?
- Q11: What is the legal form of your establishment/organization?
- Q12(a): Please identify the sector(s) that your establishment works in.
- Q12(b): Please specify the primary sector of your establishment.
- Q13(a): Does your establishment have an explicitly stated social/purpose/mission?
- Q13(b): Please identify the categories that apply best to your establishment's social mission or scope of activities.
- Q13(c): Please specify the primary category.
- Q14(a) : Does your establishment have an explicitly stated environmental purpose/mission?
- Q14(b): Please identify the categories that apply best to your establishment's environmental purpose/mission.
- Q14(c): Please specify the primary category.
- Q15: Please indicate the number of employees within your establishment during the last financial year.[full-time, part-time, seasonal, freelance and contract, volunteers]
- Q16: Does your establishment employ specific target groups (or intended beneficiaries such as persons with disabilities, homeless people, women, persons with mental illness, ethnic communities)?
- Q17: Does your organization earn some of its income through a market-based or business activity (i.e., through the provision of goods and/or services)?
- Q18(a): Does your organization offer/provide support to other organizations?
- Q18 (b): If yes, please indicate the type of support activity your organizations provides.
- Q19: Typically, if your organization generates a financial surplus or profit, how does it distribute most of the surplus earned?
- Q20: What was your actual operating budget and actual capital budget for the last full accounting year?
- Q21: For the last fiscal year, please indicate your organization's total revenues from the following areas [government grants, loans, service contracts, sale of goods/ services, etc.].
- Q22: Are you a member of any networks, associations or umbrella groups?
- Q23: Please list other social economy organizations that you interact with (if you interact with multiple organizations please name the three most frequent).
- Q24-Q26: Follow-up questions and comments.