

# PRINCE EDWARD ISLAND SOCIAL ENTERPRISE SURVEY (2014)

*This survey is part of a national study of social enterprises being conducted by Simon Fraser and Mount Royal Universities in partnership with the Community Foundation of Prince Edward Island and their social enterprise working group of the PEI Community Sector Network. The purpose of this survey is to help to identify and support the social enterprise sector in PEI and to better understand the social enterprise sector, primarily non profits, co-operatives, and other organizations that:*

- *earn some, or all, of their revenues from the sale of goods and services; and*
- *invest the majority of their surpluses/profits into social, cultural or environmental goals*

*The information gathered through this survey will help guide the government, community, and social enterprises themselves in the development of new resources, programs and policies to help this important sector of our Prince Edward Island economy to grow.*

Questions? Contact Katharine MacDonald –  
Project Research Assistant Phone: (902) 394-5553  
E-mail: [kmcmacdonald@gmail.com](mailto:kmcmacdonald@gmail.com)

## Welcome to the 2014 Social Enterprise Survey for Prince Edward Island

This survey has been pre-tested and is expected to take a maximum of 25 minutes to complete, assuming you have the required information, including your 2013 year-end financial statement, available.

Please note, you can exit the survey and then return to complete it by entering your e-mail on the front page, as long as you have not finished it.

We appreciate you taking your valuable time to complete this survey. An opportunity to provide comments or suggestions will appear at the end of the survey.

**You may preview a READ ONLY version of the entire survey. This is for information purposes only.**

Please complete the survey as soon as you are able. Your information is important to us.

Please enter your email address below.

You will need to re-enter your email address here if you want to return to complete the survey.

**PLEASE DO NOT CLICK ON THE FINAL SUBMIT BUTTON AT THE END OF THE SURVEY IF YOU INTEND TO RETURN TO COMPLETE THE SURVEY.**

**Data is saved automatically as you complete each page.**

<b>Email:</b>		
---------------	--	--

## Statement on research ethics

This research project is being conducted by the Community Foundation of Prince Edward Island and their social enterprise working group in collaboration with Dr Peter Hall (Simon Fraser University), Dr Peter Elson (Mount Royal University). The goal of this survey is to support the social enterprise sector by creating clear indicators of the nature, scope and socio-economic contribution of social enterprises in Nova Scotia.

Your participation in this survey is entirely voluntary. It is assumed that you have the authority to answer the questionnaire on behalf of your social enterprise. Ideally, we would like you to answer all questions, but please feel free to decline any or all questions you would rather not answer. No risks to participating in this survey are anticipated, while the social enterprise sector broadly will benefit from the study.

Your name will be kept confidential, as will the individual answers you provide. However, we cannot guarantee the confidentiality of questionnaires submitted by email. Your answers will be combined with those provided by other respondents, and analyzed by the research team. The original questionnaires will be held in locked cabinets in our university offices until the end of 2015, and then destroyed. An electronic version of the data will be available only to the research team on secure computers.

The final survey report will be placed on the website for *e Community Foundation of Prince Edward Island*, the Institute for Nonprofit Studies, Mount Royal University and the Social Enterprise Sector Survey web site: [www.sess.ca](http://www.sess.ca) may be used in promotional and educational materials, and policy-related initiatives. We will send you an email informing you of the release of the report. We anticipate that the research will be completed by May, 2014.

If you have any questions please contact *Steve McQuaid* at 902-569-4283 or [steve@aegroup.ca](mailto:steve@aegroup.ca); Dr Peter Elson at 403-440-8722 or [pelson@mtroyal.ca](mailto:pelson@mtroyal.ca) or Dr Peter Hall at 778-782-6691 or [pvhall@sfu.ca](mailto:pvhall@sfu.ca). The research has been reviewed and approved by the SFU Office of Research Ethics (ORE ref 2011s0245) and the MRU Human Research Ethics Board (HREB). You may address any concerns or complaints to Dr Jeff Toward, Director, Office of Research Ethics by email at [Jtoward@sfu.ca](mailto:Jtoward@sfu.ca) or telephone at 778-782-6593. or to the Chair HREB, MRU (403)440-6494 or [hreb\\_chair@mtroyal.ca](mailto:hreb_chair@mtroyal.ca).

Please answer the following: I agree, of my own free will, to participate in this questionnaire survey for the Social Enterprise Study, 2014 (please check one):

	Yes	No
	<input type="radio"/>	<input type="radio"/>

## Definition of a social enterprise in this survey

"A social enterprise is a business venture operating in Prince Edward Island that sells goods or provides services in the market for the purpose of creating a blended return on investment, both financial and social/ environmental/ cultural"

**So that we can classify your organization correctly, please indicate which of the following activities and criteria apply to your organization**

	YES	NO
Our organization owns or operates a business venture	<input type="radio"/>	<input type="radio"/>
Our organization sells goods and services in the market for the purpose of creating a blended return on investment, both financial and social/environmental/cultural	<input type="radio"/>	<input type="radio"/>

Thank you. Please continue to complete the survey.

The questionnaire is designed for quick completion.

Please complete check the appropriate box for each question, or insert dates, numbers, amounts or text as requested.

Please provide the following details about your Social enterprise

Name of Social enterprise	_____
Mailing address	_____
Postal code:	_____
Phone number (with area code):	_____
Web site URL:	_____

1.0 Year of formation and operation. Please answer parts 1.1 and 1.2

1.1 In which year was your Social enterprise formed (incorporated/ approved its founding constitution)?	_____
1.2 in which year did your Social enterprise first start selling products or services?	_____

2. What is the PURPOSE of your Social enterprise?

*Please check **all** that apply*

Social purpose	<input type="checkbox"/>
Cultural purpose	<input type="checkbox"/>
Environmental purpose	<input type="checkbox"/>
Income generation for parent organization	<input type="checkbox"/>
Employment development	<input type="checkbox"/>
Training for workforce integration	<input type="checkbox"/>

2.1 In your own words, what is the PRIMARY MISSION of your Social enterprise?

_____
-------

3.0 Does your Social enterprise have individual or organizational members?

Yes	<input type="radio"/>
No	<input type="radio"/>

If **YES**

3.1 How many individual members does your Social enterprise have?	_____
3.2 How many organizational members does your Social enterprise have?	_____

4.0 What is the form of incorporation of your Social enterprise?

Please check **all** that apply

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Nonprofit corporation/ society                        |
| <input type="checkbox"/> | Limited liability corporation (for-profit)            |
| <input type="checkbox"/> | Co-operative, non-financial (distributes surplus)     |
| <input type="checkbox"/> | Co-operative, non-financial (non-profit distributing) |
| <input type="checkbox"/> | Credit union/ Caisse Populaire                        |
| <input type="checkbox"/> | Other (please specify) _____                          |

5.0 Is your Social enterprise a registered charity with the Canada Revenue Agency or a qualified donee?

- |     |                       |
|-----|-----------------------|
| Yes | <input type="radio"/> |
| No  | <input type="radio"/> |

6.0 Do you have a parent organization?

- |     |                       |
|-----|-----------------------|
| Yes | <input type="radio"/> |
| No  | <input type="radio"/> |

6.1 If yes, what is the name of your parent organization?

\_\_\_\_\_

6.2 What is your relationship with the parent organization?

Select the **one** option which best describes your relationship with the parent organization:

- |  |                       |
|--|-----------------------|
| We have no parent organization   | <input type="radio"/> |
| We are an in-house program, project or department of the parent organization             | <input type="radio"/> |
| We are a separate organization that works closely with the parent organization           | <input type="radio"/> |
| We are an independent organization, operating at arm's length from a parent organization | <input type="radio"/> |

6.3 Did your parent organization regularly provide any of the following supports in the past 12 months?

Please check **all** that apply

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Personnel (time of staff, administration, management, etc) |
| <input type="checkbox"/> | In-kind (goods, materials, transportation, etc)            |
| <input type="checkbox"/> | Space (offices, storage, accommodations, etc)              |
| <input type="checkbox"/> | Finance (grants, loans, loss write-off, etc)               |
| <input type="checkbox"/> | Other (please specify) _____                               |

7.0 What is the name of the municipality (town, city, village, district or reserve) in which your main office is located?

\_\_\_\_\_

7.1 In which of the following geographic areas or scales do you operate or provide services?

Please check **all** that apply

- |                          |                                      |
|--------------------------|--------------------------------------|
| <input type="checkbox"/> | To a neighbourhood / local community |
| <input type="checkbox"/> | To a city / town                     |

7.1 In which of the following geographic areas or scales do you operate or provide services?

Please check **all** that apply

<input type="checkbox"/>	Across a region (county / regional district)
<input type="checkbox"/>	Across the province / territory
<input type="checkbox"/>	Across Canada
<input type="checkbox"/>	Internationally
<input type="checkbox"/>	Other (please specify) _____

8.0 In which sectors does your Social enterprise sell products and/or services?

Please check **all** that apply.

<input type="checkbox"/>	Accommodation (overnight, short-term)
<input type="checkbox"/>	Administrative services
<input type="checkbox"/>	Agriculture, forestry, fishing, mining
<input type="checkbox"/>	Arts and culture
<input type="checkbox"/>	Communications (mail, radio, internet)
<input type="checkbox"/>	Construction
<input type="checkbox"/>	Consulting
<input type="checkbox"/>	Day care
<input type="checkbox"/>	Education
<input type="checkbox"/>	Emergency and relief
<input type="checkbox"/>	Employment services
<input type="checkbox"/>	Environment and animal protection
<input type="checkbox"/>	Facilities (banquet, conference, party)
<input type="checkbox"/>	Finance and insurance
<input type="checkbox"/>	Food service/catering
<input type="checkbox"/>	Food production
<input type="checkbox"/>	Food distribution
<input type="checkbox"/>	Gallery/arts
<input type="checkbox"/>	Health care (incl. hospital, nursing, clinic, crisis care, addictions, etc)
<input type="checkbox"/>	Housing (long-term rental, assisted, etc)
<input type="checkbox"/>	Janitorial/cleaning (incl. street cleaning)
<input type="checkbox"/>	Landscaping/Gardening
<input type="checkbox"/>	Law, advocacy, politics
<input type="checkbox"/>	Movers/hauling
<input type="checkbox"/>	Personal services
<input type="checkbox"/>	Printing and publishing
<input type="checkbox"/>	Production/manufacturing
<input type="checkbox"/>	Professional services
<input type="checkbox"/>	Property Management
<input type="checkbox"/>	Public administration/services to government
<input type="checkbox"/>	Real estate (development and management)
<input type="checkbox"/>	Repair and Maintenance
<input type="checkbox"/>	Research
<input type="checkbox"/>	Retail sales (incl. Thrift stores)
<input type="checkbox"/>	Scientific/technical services
<input type="checkbox"/>	Services to private businesses
<input type="checkbox"/>	Services to social enterprises, cooperatives, non-profits, charities and their employees
<input type="checkbox"/>	Sewing
<input type="checkbox"/>	Social services (incl. income, social work)
<input type="checkbox"/>	Sports and Recreation
<input type="checkbox"/>	Theatre/performing arts
<input type="checkbox"/>	Tourism
<input type="checkbox"/>	Transportation and storage
<input type="checkbox"/>	Waste management (incl. recycling)

8.0 In which sectors does your Social enterprise sell products and/or services?

Please check **all** that apply.

<input type="checkbox"/>	Wholesale sales	
<input type="checkbox"/>	Other (please specify)	_____

9.0 Which of the following demographic groups does your Social enterprise train, employ or provide services to as part of your mission?

Please check **all** that apply:

<input type="checkbox"/>	All the people living in a particular place / community	
<input type="checkbox"/>	Aboriginal / Indigenous people	
<input type="checkbox"/>	Children	
<input type="checkbox"/>	Ethnic group / minority	
<input type="checkbox"/>	Family	
<input type="checkbox"/>	Homeless persons	
<input type="checkbox"/>	Immigrants (including temporary workers, permanent residents, etc)	
<input type="checkbox"/>	Lower income individuals	
<input type="checkbox"/>	Men	
<input type="checkbox"/>	People living with addictions	
<input type="checkbox"/>	People living with employment barriers	
<input type="checkbox"/>	People living with psychiatric disabilities	
<input type="checkbox"/>	People living with intellectual disabilities	
<input type="checkbox"/>	People living with physical disabilities	
<input type="checkbox"/>	Refugees	
<input type="checkbox"/>	Senior / aged / elderly	
<input type="checkbox"/>	Women	
<input type="checkbox"/>	Youth / young adults / students	
<input type="checkbox"/>	Other (please specify)	_____

9.1 - 9.3 We would like to know about how many people in the target populations listed in Question 9.0 you trained, employed or provided with services.

*It is okay to count the same person in more than one category.*

*Estimated totals are acceptable.*

*Do not include people who are exclusively the retail customers of your Social enterprise.*

	9.1 From the groups listed above, in 2013, how many people did you train?	_____
	9.2 From the groups listed above, in 2013, how many people did you employ?	_____
	9.3 From the groups listed above, in 2013, how many people did you provide services to?	_____

10.0 How many people were employed or volunteering at your Social enterprise during 2013?

*Estimated totals are acceptable.*

*Please include those who you employed as part of your mission (see question 9.3):*

Full-time paid employees (30 or more hrs/week)	_____
Part-time paid employees (less than 30 hrs/week)	_____
Seasonal employees (30 or more hours per week for more than 2 weeks but less than 8 months)	_____
If known, TOTAL FTEs (full time equivalent employment at 2,000 hours p.a.)	_____
Freelancers, contract, on-call workers (hired for a specific project or term)	_____
Volunteers (incl. unpaid interns, etc) who worked 10 or more hrs/month	_____
Volunteers (incl. unpaid interns, etc) who worked less than 10 hrs/month	_____

11.0 We would like to know about the revenue and expenses in 2013 of your Social enterprise.

*Estimated totals are acceptable.*

*Please fill in as much detail as you can, and round off amounts to the nearest \$1,000.*

*If there is no revenue or expense for a category, please enter 0.*

<b>REVENUE</b>	
Revenue from sales of goods and services, including service contracts with government	_____
Revenue from grants and donations received from parent organization (do not include loans)	_____
Revenue from grants and donations from other organizations and private individuals (do not include loans)	_____
Other Revenue	_____
<b>Total revenue from all sources in 2013</b>	_____
<b>EXPENSES</b>	
Total wages and salaries paid, including target groups in training within your Social enterprise	_____
Total financial transfers to parent organization, if applicable	_____
All other operating expenses	_____
<b>Total expenses on all items in 2013</b>	_____

12.0 What were the sources of **grants and donations** received in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Foundations
<input type="checkbox"/>	Federal government
<input type="checkbox"/>	Provincial government
<input type="checkbox"/>	Municipal government
<input type="checkbox"/>	Private individuals, philanthropists, donors
<input type="checkbox"/>	Bank
<input type="checkbox"/>	Corporations/Private businesses
<input type="checkbox"/>	Parent organization
<input type="checkbox"/>	Credit Union
<input type="checkbox"/>	Community Futures/ Community Business Development Corporations
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received

12.1 What were the purposes of **grants and donations** received in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Training, and technical assistance
<input type="checkbox"/>	Operations and program/ service delivery
<input type="checkbox"/>	Governance and management (e.g. strategic planning)
<input type="checkbox"/>	To research, develop, implement or expand a product or service
<input type="checkbox"/>	Capital project (e.g. new land, building, equipment, upgrades/ retrofit )
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received

12.2 What were the sources of **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Foundations
<input type="checkbox"/>	Federal government
<input type="checkbox"/>	Provincial government
<input type="checkbox"/>	Municipal government
<input type="checkbox"/>	Private individuals, philanthropists, donors
<input type="checkbox"/>	Bank
<input type="checkbox"/>	Corporations/Private businesses
<input type="checkbox"/>	Parent organization
<input type="checkbox"/>	Credit Union
<input type="checkbox"/>	Community Futures/ Community Business Development Corporations
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No loans/ debt instruments taken out

12.3 What were the types **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Operating line of credit
<input type="checkbox"/>	Repayable equity
<input type="checkbox"/>	Long-term loans / equity
<input type="checkbox"/>	Short-term loans
<input type="checkbox"/>	Other (please specify) _____



12.4 What were the purposes of **loans/ debt instruments** taken out in 2013?

Please check **all** that apply:

<input type="checkbox"/>	Training, and technical assistance
<input type="checkbox"/>	Operations and program/ service delivery
<input type="checkbox"/>	Governance and management (e.g. strategic planning)
<input type="checkbox"/>	To research, develop, implement or expand a product or service
<input type="checkbox"/>	Capital project (e.g. new land, building, equipment, upgrades/ retrofit)
<input type="checkbox"/>	Other (please specify) _____
<input type="checkbox"/>	No grants and donations received

### Building the Capacity of Prince Edward Island's Community Sector

Over the past 18 months a number of not-for-profit community organizations and groups, have collaborated to form the Community Sector Network (CSN). Some of these organizations include: the Community Legal Information Association; Big Brothers - Big Sisters; the PEI Association of Newcomers to Canada; Women's Network, and Habitat for Humanity. The CSN is working to help strengthen the collective profile, work, and contributions of the not-for-profit community sector on PEI. Through its efforts the CSN aims to:

- Create opportunities to work together and share successes, knowledge and tools.
- Inform and educate the public by describing the nature, scope, and diversity of the sector.
- Provide the sector with a more collective and cohesive voice.
- Engage in public policy initiatives and discussions.

The Community Sector Network Working Group would like to hear your views.

Please complete the following questions

	Strongly support	Support	Do not support	Strongly do not support	Not sure/ Don't know
Do you support the development of a Community Sector Network on PEI	○	○	○	○	○
Please add any comments to explain your response above	<hr/> <hr/>				

Which of the following purposes or functions do you think a Community Sector Network should serve?						
		Definitely needed	Needed	Might be needed	Not needed	Not sure/ Don't know
	A networking vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	A vehicle to address broader issues common to all groups and organizations  (e.g. recruitment and retention of staff, of volunteers, professional development of staff, fiscal sustainability )	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Advocacy on broad policy questions that impact on community and nonprofit groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Other: Please specify	<hr/> <hr/>				

Please add any comment to your responses	<hr/> <hr/>
--	-------------

	Yes	No	Don't know/ Need more information
Is your organization interested in being part of such a Community Sector Network?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How would you rate your level of interest and potential involvement in a Community Sector Network?

	Very high	High	Moderate	Low/ No Interest	Not sure/ Don't know
Being on a mailing list re status update reports, upcoming events or activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Joining or being part of the Community Sector Network Working Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Joining or being part of an issue specific working group or committee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participating in and/or leading professional development workshops on issues of mutual interest to non-profit groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other: Please specify	<hr/> <hr/>				

**THANK YOU FOR YOUR PARTICIPATION!**

If there is any information that you wish to add to the questionnaire response and are unable to do so, please e-mail *Steve McQuaid* at *steve@aegroup.ca* or call him at 902-393-4282

Once the final survey report has been prepared you will be sent a link so it can be downloaded

Please use this space to make any comments or suggestions	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
---	-------------------------------------