

Organizational Management Project for Enterprising Non-Profits BC

**“Exploration of Impact and Outcomes on Past Participants to Inform Value Proposition
and Future Opportunities for *Enterprising Non-Profits BC*”**

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Glossary of Terms

Blended Value

Producing both financial and social benefit.

Community Contribution Companies (C3)

In July 2013, the BC government instated the addition of a new type of incorporation called C3, or Community Contribution Companies, which allows organizations to “pursue social goals through their businesses while still generating a profit and providing investment opportunities to like-minded investors” (Ministry of Finance, 2015).

Canadian Revenue Agency (CRA)

Government-run regulatory body that registered charities must submit annual reports to detailing income, expenditures and activities. This body also determines what is permissible as “charitable activities” which can include commercial activities providing that business activities align with the charitable mandate, and profits are reinvested into the cause.

Capacity-building

Activities that assist organizations with the aim of both strengthening existing operations and capacity as well as achieving sustainability and increasing scope.

Registered charity vs non-profit

This is a distinction in terms of legal structure not purpose. A non-profit organization is one that is provincially incorporated as pursuing social benefits and cannot produce a profit that goes to shareholders, etc. However, it is not federally registered and cannot issue official tax receipts for donations received. Registered charities are approved by the CRA and can issue tax receipts as long as their charitable status is active and they file annual returns with the CRA declaring all receipts issued.

Revenue diversification

In the context of non-profit organizations, revenue diversification is the process in which an organization diversifies its funding sources to make it less reliant on a small pool of large funding streams.

Revenue-generating, enterprising activities

Term used to indicate activities and initiatives generate revenue.

Social Enterprise and Enterprising Non-profit

There are many differing definitions of social enterprises, and it is important to clarify what is meant when the term is used in this report. For the purposes for this project, the term “social enterprise” is used to describe any business venture that is operated by a non-profit group or organization. The term “enterprising non-profits” refers to the non-profit group that runs the social enterprise.

Third Sector

Another term for the charitable sector.

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Executive Summary

This research project was conducted for Enterprising Non-Profits (ENP), a resource body connected to the VanCity Foundation that helps non-profits across British Columbia. *ENP* provides training, toolkits and grants to non-profits to help them develop or expand revenue-generating activities that promote financial stability. *ENP* is a pioneer in British Columbia, helping the charitable sector think outside-the-box to blend business skills-sets with its strength in human services.

Looking to the future, *ENP* wants to both build on past successes and explore new opportunities to continue to equip and strengthen the charitable sector across the province. To do this, *ENP* requires a thorough understanding of the impact its services have had, and consider how to develop and communicate their value proposition both to potential clients and partners. Further, *ENP* needs an understanding of future opportunities that will be most impactful. To this end, both secondary and primary research was conducted to answer the question, *How has training, resourcing and funding the development of revenue-generating activities effectively impacted non-profits in becoming more financially stable and increasing their capacity to fulfil their mandate?*

Secondary research consisted of a thorough review of academic studies and papers as well as trade journals and resource-body publications. This revealed clear trends in the non-profit sector that point to an increasingly competitive and constrained funding environment. This, combined with innovative new methods of solving community problems with business ventures has contributed to the emergence of the social enterprise sector, with many non-profits looking to develop enterprising activities. However, this is not without its challenges, and research revealed that non-profits consistently struggle with sustainability, particularly due to the lack of business training and skills in non-profit management, as well as capacity and silo issues. Further, non-

profits struggle with marketing and sales, and many face unique geographical challenges due to location. Finally, research into the impact of capacity-building initiatives provided context to consider *ENP*'s activities by. Documented impacts include leadership development, scope of community engagement, and revenue and program development.

The direction of primary research was informed by secondary research findings and conducted via surveys that solicited seventy-five (75) complete responses, a focus group with four (4) participants and fifteen (15) phone interviews. Participants were all past clients of *ENP* that had not been in contact for a minimum of three years. Findings reinforced secondary research, and explored *ENP*'s impact from the client perspective as well as current challenges faced and suggestions for future offerings.

Clients consistently reported that *ENP*'s services had produced positive impact in organizational and leadership capacity and knowledge, provided valuable community connections, and increased revenue generation and diversification through the launch of new or expanded activities. Further, clients reported similar challenges as were identified in secondary research. Finally, clients provided suggestions for future services that *ENP* could offer.

Research findings were analyzed through a framework to identify common themes and explore meaning in the *ENP* context. Exploration of these findings indicates that while *ENP* is meeting a felt-need, it currently faces both challenges in communicating this impact, and a few key opportunities to deepen this impact in the future. Challenges in communicating the extent of its impact include *ENP*'s limited capacity, underutilized partnerships and outcomes data, as well as a lack of a comprehensive communications plan. Further, it became clear that enhancing its current offerings to provide more longitudinal, accessible and networked support are key opportunities for future growth.

Research findings and analysis led to the development of six recommendations to assist ENP in both enhancing its ability to capture, communicate and leverage its outcomes and repackaging, redesigning and expanding its offerings. Due to its limited staffing and funding capacity, the primary recommendation is to leverage its reputation and partnerships to increase its capacity. This will enable ENP to implement the subsequent recommendations. The remaining recommendations included: developing a cohesive outcomes collection and reporting plan, creating a communications and stakeholder engagement plan, repackaging current offerings, redesigning the website, and finally piloting online courses. Further, an implementation plan with costs, timelines and phases was presented to assist ENP in executing the recommendations.

Implementing these recommendations will ensure that ENP is well-positioned to continue pioneering social enterprise resourcing in BC, by meeting non-profits where they are at and providing value-added offerings to assist them in their efforts to develop and expand revenue-generating activities. Finally, implementing the recommendations will also better-equip ENP to clearly demonstrate its value proposition and ongoing impact. This is critical both to maintain its reputation as the market-leader, and to attract new clients and partners to expand its scope of work in the future.

Introduction

Social Enterprises: A Brief Overview

Social enterprises and enterprising non-profits comprise a relatively new industry and there is still much debate internationally about common definitions, identities and purposes. In layman’s terms, “social enterprise” is often used as a catch-all term that does not provide sufficient distinction in organizational models (Cheng, Goodall, Hodgkinson, & Kingston, 2010). Thus, there is a need to provide clarity on the spectrum of organizational models when discussing both social enterprises and enterprising non-profits. Figure 1 below illustrates this spectrum of models, with enterprising non-profits and social enterprises situated between traditional charities and single-bottom line businesses (Canadian Task Force on Social Finance, 2010).

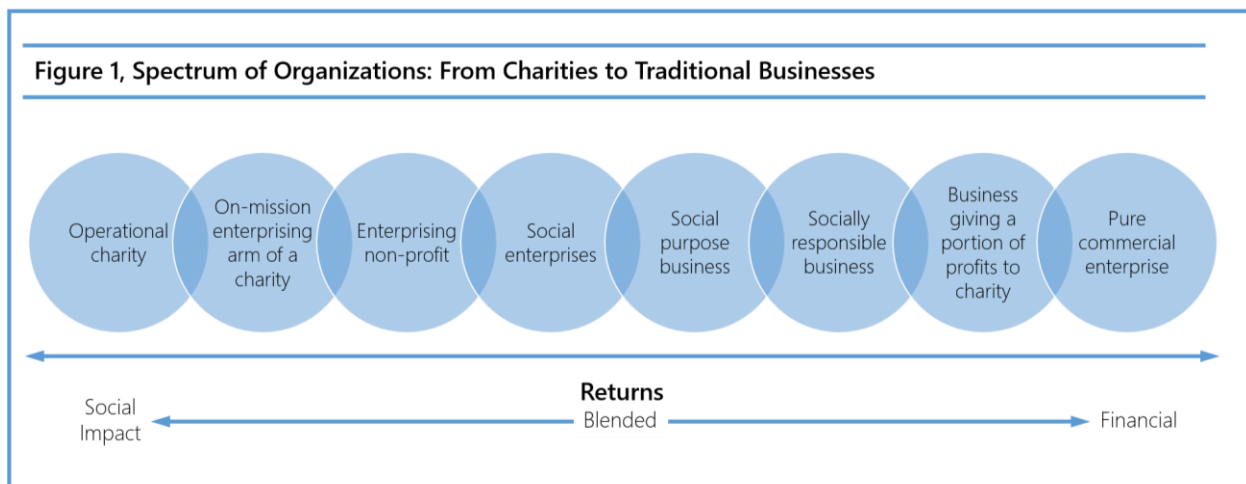


Figure 1- Spectrum of Organizations: From Charities to Traditional Businesses (Canadian Task Force on Social Finance, 2010)

In Canada, there has been much work done in the past decade to analyze, define and report on social enterprises, both in the academic and charitable sectors (Elson & Hall, 2012). As a result, there are currently three main widely-accepted criteria that categorize social enterprises

in Canada. Firstly, a social enterprise is a business venture, such as the sale of goods or services, where profits are principally reinvested into social purposes (Elson & Hall, 2012). Secondly, it is owned or operated by a non-profit group or organization (Enterprising Non-Profits, 2010), or is incorporated with Community Contribution Companies (C3) status (Ministry of Finance, 2015). Finally, the business activities must achieve a social, environmental, or cultural benefit (Elson & Hall, 2012).

Enterprising non-profits are unique in that they are non-profit entities who are conducting some type of commercial activity that generates revenues for the non-profit. There are a wide variety of enterprising activities that non-profits undertake, ranging from fee-for-services to renting out unused office or meeting space. This paper will focus on enterprising non-profits as opposed to C3 companies or social purpose businesses.

The emergence of the social enterprise industry is relatively new, however, the concept is one that has long been established. Farmers' Markets, thrift stores, and co-operatives all represent common social enterprises operated on a wide scale for many decades. Social enterprises and enterprising non-profits represent a significant and growing portion of economic activity in British Columbia (BC), as this report will explore in more detail. Further, there has been a surge of new social enterprises and enterprising activities undertaken by non-profits in recent years (Hall, Elson, & Wamucii, 2014).

Enterprising Non-Profits BC

Enterprising Non-Profits BC (*ENP*) began as a pilot project in 1997 aimed at helping 10 non-profits develop social enterprises to become more financially independent. Since then, the project has grown and evolved into a resource body that helps non-profits all across British Columbia, with additional chapters across the nation. *ENP* provides training, toolkits and grants

to non-profits to help them develop or expand revenue-generating activities that promote financial stability.

ENP has four objectives:

- To enhance enterprise skills;
- To ensure access to capital and investment;
- To expand market opportunities, and;
- To build healthy communities. (About enp-BC , n.d.)

One of the only resource bodies of its kind in the province, *ENP* plays a leading role in inspiring, educating, and fostering BC's non-profits that are looking to develop enterprising ventures. It currently provides capacity-building grants to approximately 50 organizations per year and hosts over 20 training workshops annually throughout the province. As a result, over 500 individuals representing approximately 300 different non-profits from around the province are trained annually. Many of its workshops sell out, and the need continues to grow. Beyond this, *ENP* provides many other resources such as regional *Days of Learning* events, many online toolkits and resources, as well as an annual competition called *Social Enterprise Heroes* which highlights the work of three successful social enterprise ventures.

ENP has been a pioneer in BC, helping the charitable sector think outside-the-box to blend business skills-sets with its strength in human services. Of particular significance are its capacity-building grants which provide BC non-profits the funding needed to hire external consultants and experts to assist in developing a business plan for an enterprising venture or conducting a feasibility study to determine whether or not a proposed venture is likely to be successful. Looking to the future, *ENP* wants to both build on past successes and explore new opportunities to continue to equip and strengthen the charitable sector across the province.

Although a significant provincial resource body, it is a small two-person-run program. It does not currently possess the in-house capacity to keep in contact with past clients or conduct a thorough evaluation of outcomes. Thus, there is no understanding of where client organizations are at, how their interaction with *ENP* impacted them, or how *ENP* could help now or in the future. This impacts its ability to better tell its story, and clearly communicate its value proposition to existing or potential partners. Additionally, it limits the opportunities of exploring new methods of supporting non-profits.

The purpose of this Organizational Management Project (OMP) is to explore the impact of *ENP*'s activities, as well as the current state and challenges of past clients. Additionally, this project will review sector-wide research on non-profit capacity-building, and the development of revenue-generating initiatives. The project will analyze common themes and how *ENP*'s value proposition can be communicated and further explored.

This project aims to enable *ENP* with a base of knowledge needed to develop a concrete value proposition and case for support to encourage more organizations and potential funders to get involved. Secondly, this OMP will illuminate which activities or resources have provided the most significant impact on past clients. This can help to guide future initiatives, focus and funds. Finally, this project will provide recommendations based on both primary and secondary research of what identified gaps could be explored to better fulfil its mandate as it continues to grow.

Outline of Research Methodology

To provide recommendations to *ENP* to assist in assessing their value proposition and exploring potential future services, research was conducted to address the following research question: *How has training, resourcing and funding the development of revenue-generating activities effectively impacted non-profits in becoming more financially stable and increasing their capacity to fulfil their mandate?* Exploring a comprehensive answer to this question required an understanding of impacts experienced by past clients as well as their current state and challenges, in addition to their suggestions for future services.

The research methodology included both secondary and primary research. Preliminary secondary research was conducted to review past *ENP* reports as well as sector reports and trends. A literature review was undertaken, with a particular emphasis on studies conducted that explored themes that were prevalent in both *ENP* and industry reports. This information, along with client consultation, informed the ultimate direction of the primary research. The data from the primary research, particularly the survey and early interviews, assisted in the further identification and analysis of common themes, and further secondary research was conducted to pursue thematic similarities.

Secondary Research

Literature review.

A literature review was undertaken to identify and explore common themes in research of social enterprises, non-profit capacity-building initiatives, diversified non-profit revenue streams, non-profit challenges and the development of revenue-generating activities. The goal of the review was twofold: first, to provide a foundation of knowledge of the current sector state and challenges;

and second, to gain a comprehensive understanding of results and impacts experienced across the sector from initiatives similar to those of *ENP*.

The literature review, limited to items published from 2007 onwards, was primarily conducted through searches facilitated by the Royal Roads University (RRU) Library database and *Google Scholar*. When searching databases, key search terms were used such as: *non-profit diversified revenue, charity revenue generation, non-profit capacity building, social enterprises, enterprising non-profits, non-profit sustainability, and non-profit commercial ventures*. Initial searches were assisted by themes identified in sector reports. Additionally, many reports cited similar seminal or authoritative previous research which assisted in finding further relevant results.

Non-academic research.

Additionally, a thorough review of non-academic sources was conducted. First, various documents and reports from *ENP* were explored, including industry reports and toolkits as well as other research projects conducted on *ENP's* behalf. This initial review assisted in the direction of further research of industry reports and trends. These were comprised of a variety of sources including *Statistics Canada* and other reporting bodies, as well as some non-profit and social enterprise journals. A number of *ENP* partners are non-profit resource bodies across Canada and exploration of their websites provided a wealth of industry-specific reports and publications.

Primary Research

Primary research was conducted through three mediums: surveys, a focus group, and also phone interviews. This variety assisted in compiling a thorough assessment of past participant responses and outcomes. All primary research was approved by the RRU Ethics Board, and was conducted in alignment with RRU's research policies and guidelines (Royal Roads University, 2014). As requested by the client, all research was conducted with clients who had not been in

contact with *ENP* for a minimum of three years. The rationale for this grouping was that it would assist *ENP* in understanding what long-term impacts, if any, were felt by these clients, as well as to explore the reason for lack of contact.

Surveys.

Surveys were chosen in order to provide a broader respondent base to assist in the establishment of larger trends across the province. Surveys were sent out electronically to a list of past clients from *ENP*'s database. This list consisted only of organizations that had not been in contact with *ENP* for a minimum of three years. All surveys included the same questions with an overview that was tailored to groupings of past clients, based on how many years had passed since they had last been in contact with *ENP*. Four distinct groupings were created with the following parameters: organizations who had not been in touch in 3-4 years, 5-6 years, 7-8 years and finally 9 or more years. Responses were collated electronically and used to help identify trends and areas of contrast. Responses also further shaped the direction of secondary research as well as the focus group and interviews.

A total of seventy-five (75) complete responses were received from organizations across BC. As expected, respondents from each grouping were represented on a sliding scale, with the largest group being those who had only been out of contact for three to four years, and the smallest group being those who had been out of contact for nine or more years. Respondents included both clients who had been grant recipients, representing approximately one-third of all responses, and those who had not, representing the remaining two-thirds. This is an important distinction when considering the level of impact reported by these organizations.

Focus groups and interviews.

Additionally, both focus group and interviews were employed in order to provide a much more in-depth qualitative assessment of *ENP*'s services as well as the current challenges and proposed future services. These mediums allowed for the interviewer to ask follow-up questions or for further clarification. Finally, they allowed for a reflection of the respondent's overall tone and perspective of *ENP*'s performance.

One focus group was conducted in Vancouver, with four (4) participants, however financial and time restraints prohibited travelling to areas outside of the Lower Mainland. In order to ensure that there was representation from across the province, fifteen (15) individual phone interviews were also conducted with organizations from a variety of locations around BC. Participants were selected from *ENP*'s past client list, with a particular focus on organizations who were grant recipients.

Identified interview candidates were contacted primarily through email with follow up calls to arrange a time of convenience for them. Interviews followed a structured format, starting with demographic questions and then moving on to solicit commentary from each organization. Particular emphasis was placed on exploring the direct and indirect impacts of *ENP*'s services, as well as exploration of what further services might look like. After each interview, recorded answers were summarized and organized into broad categories for ease of further analysis.

Limitations of primary research.

It should be noted that primary research was limited in both number of clients contacted compared with *ENP*'s whole client base. Further, by conducting research with clients who had not been in contact with *ENP* for a minimum of three years, it is likely that client recollection of the services provided may be limited at best, and may provide an inaccurate picture of their response

to *ENP*'s services at the time of provision. Finally, the surveys provided the largest sampling of respondents, however they were constrained into mostly multiple choice questions with some free text boxes to provide an opportunity for participants to comment further. Most respondents did not fill in the free text, and so it is difficult to get a holistic understanding of their overall perception of *ENP*.

Demographics of respondent organizations.

Demographic information was collected from all respondent organizations to capture organizational profiles and to provide further context when interpreting findings. Standard demographics collected includes types of organizational structure, location, annual income, and number of employed staff. Additionally, to get an understanding of how many respondents are actively pursuing an enterprising venture, further data was collected on percentage of revenue coming from revenue-generating activities, number of enterprising activities currently employed, and the different types of these activities.

Findings from the standard demographical information collection reveal that almost all respondents are either non-profits or non-profits with charitable status. A small handful of others self-identified as co-operatives or First Nation groups. Further, almost half of all organizations are outside of an urban area, and respondents from most regions across BC were well-represented. Almost a third of all responding organizations make less than \$100,000 annually, with a further third making less than \$499,999. Finally, over half of all respondents have less than 5 employees, and only one-fifth of respondents had over 20 employees.

Enterprising activity data was mostly divided into two camps: those who had a number of activities generating a significant portion of their annual income, and those who didn't yet run any activities, or only had a couple of small initiatives that hardly generated a profit. One third of

respondents indicated that over 50% of their annual income came from revenue-generating activities. This is contrasted with another large segment that indicated that either no or little revenues (less than 10% of annual income) were generated. Further, almost half of respondents indicated they ran more than three different types of revenue-generating activities, with 15 per cent indicating they ran over six types of activities, contrasted with over half who ran either none or only one or two types of activities. Types of reported revenue-generating activities included a mix across the board of sales of goods, fees for services or programs, rental of space, retail stores, and “other.”

Particular attention was given when organizations self-reported as significantly large compared to the rest of the sampling. Due diligence was exercised when analyzing responses from this group to ensure that outlying themes were first reviewed for extenuating circumstances. For example, five (5) organizations self-reported an annual income of over \$5 million with over 60 staff. This represents a significant dichotomy with the majority of other respondents and care was taken to ensure over-emphasis was not given this small segment that experience a much higher level of organizational capacity.

Analysis of Findings

Both secondary and primary research were analyzed using an analytical framework (Makar, 2015) to help ensure both key and sub-themes were captured and assessed. The process was iterative, with emerging common themes redirecting some of the focuses of further research, both secondary and primary. The goal of the primary research in particular was to identify common themes in impacts felt, challenges experienced, and suggestions for future services. Secondary research helped to both inform and confirm the primary research process and findings. The primary

research analytical framework used provided a summary view of common themes to assist in both identifying key topics and also supporting comments, and can be viewed in Appendix B.

Summary of Secondary Research Findings

A review of both academic and other reports revealed that Canada's third sector is large and well-established, and continues to rapidly grow. Meanwhile, trends in donations and funding have been less promising, meaning that more and more charities are competing for fewer and fewer available dollars (Statistics Canada, 2015). This has led to the emergence of the social enterprise industry, however it is fraught with many challenges. Capacity-building activities are shown to provide significant benefit to non-profits (Minzner, Klerman, Markovitz, & Fink, 2013), which may help them when attempting to launch or expand enterprising activities to augment revenue and better achieve their mission. These themes are explored in greater depth below.

Sector Trends

Growth and scope of non-profits.

Canada has the world's second largest charitable sector, after the United States, and consists of approximately 170,000 organizations, split roughly evenly between registered charities and non-profit organizations (Imagine Canada, n.d.; Jondreau, 2015). The sector is experiencing significant ongoing growth with an increase of over 25 per cent from 1992 to 2008 alone (Payne, 2012a). Further, the Canadian Revenue Agency reports that it receives a new application for charitable status every two hours, with majority being approved (Blumberg, 2008). In BC alone, there are over 12,000 federally registered charities, which represents only half of the sector, with the remaining half being provincially registered non-profit organizations (Aymot, 2013).

Canada's third sector employs over 2 million people and contributes an annual average of 8.1 per cent to the total gross domestic product, representing over \$106 billion (M. H. Hall,

2010; Imagine Canada, n.d.; Jondreau, 2015). However, it should be noted that over 65 per cent of this comes from the contributions of a relatively small number of very large hospitals, universities and colleges (M. H. Hall, 2010). Once you remove these revenues, and focus only on the core non-profit sector, the revenues are still in excess of \$35.6 billion, which is greater than both the agriculture and motor vehicle industries combined (M. H. Hall, 2010; Imagine Canada, n.d.).

However, the sector is experiencing an increasing trend of bifurcation, specifically the growing divide between large and small charitable organizations. Over 50 per cent of registered charities make less than \$100,000 annually compared with 3 per cent of charities that make more than \$5 million (Spyker, 2011). Larger charities are consistently more likely to report less organizational stress and funding reductions (Imagine Canada, 2014; (Payne, 2012)), and are more optimistic about the future state of their organization (Imagine Canada, 2014). Further, the top 1 per cent of organizations command 60 per cent of all revenues in the sector (Imagine Canada, n.d.).

Donations and funding trends.

Private donations have been following a worrisome trend for the past number of years. Overall, there has been a steady increase of donated funds, from \$10.6 billion in 2010 to \$12.8 billion in 2013 (Statistics Canada, 2015). However, when these stats are explored in more depth, it quickly becomes clear that donations did not increase across the board.

In fact, charitable giving is actually declining by a number of terms. In 2006, for example, Canadians gave roughly 0.81 per cent of their combined income to charities. Since then, this rate has been in a mostly steady decline. By 2011, this had dropped to only 0.64 per cent. This means that if Canadians had donated in 2011 at the same rate they did in 2006, the

sector would have received an additional \$2.3 billion in donations (Frisk, 2013). Further, the proportion of taxpayers claiming charitable donations on their tax returns has been in decline since the early 1990's from a high of almost 30 per cent dropping to only 23 per cent in 2011 (Simms, 2014). Finally, donations from low and medium income earners is on a steady decline (Association of Fundraising Professionals, 2009).

These declining statistics prompt the question of where the overall increase in donated funds has come from. A study conducted by Abigail Payne of the University of Calgary revealed that it is almost exclusively high-income Canadians who are giving significantly more (Payne, 2012). The average annual donation size has climbed from \$458 in 1984 to \$1,437 in 2010, and it is clear that this is as a result of fewer and fewer Canadians donating increasingly larger amounts (Simms, 2014) to a small number of large charities and foundations rather than a large number of small charities (Association of Fundraising Professionals, 2009). Charitable giving is becoming increasingly dominated by Canada's richest citizens, with the top 25 per cent of donors contributing over 84 per cent of all donations, and the 10 per cent of donors alone contributing 66 percent in 2013. To put this in perspective, this means that approximately twenty-four thousand Canadians donated \$8.4 billion compared with the remainder of all Canadians collectively contributing only \$4.4 billion (Statistics Canada, 2015).

Further compounding the funding issue is the change in recent years to government funding for charities. Many non-profits have faced significant cuts or the elimination of government funding (Bull, 2008), with over 60 per cent of government fund recipients reporting they are currently experiencing problems coping with recent reductions (Struthers, 2005). Indeed, BC government spending on social services and housing has declined by \$236 per capita since the 2002 fiscal year, representing a funding shortfall of almost 76 per cent (Aymot, 2013).

Additionally, since the 1980's, the government has shifted away from providing grants to non-profits to moving towards a competitive procurement process modelled after the private sector (Aymot, 2013; Phillips & Hebb, 2010). This has had several negative impacts on the third sector including loss of services and staffing capacities in the face of increasing needs stemming from inadequate planning and needs assessments (Aymot, 2013), the breakdown of collaboration amongst non-profits due to the increased competition to secure contracts (Aymot, 2013; Bull, 2008; West, 2013), and a concentration of contracts in the hands of only the largest service providers (Aymot, 2013; Payne, 2012).

Emergence and importance of social enterprise and enterprising activities.

The continued growth of the charitable sector, leading to more and more charities competing for the same dollars, combined with the shifting financial landscape have caused the third sector to become more entrepreneurial in order to survive. However, there are a number of other factors that have combined to contribute to the accelerating emergence of social enterprises and enterprising non-profits. Public opinion of the matter is trending to support this emergence, recent research has shown strong benefits to charities engaging in revenue diversification, and revenue generation provides a unique opportunity complement and in some cases, increase non-profits' ability to fulfill their mission.

Public opinion has been trending in ways that increasingly support the concept of non-profits engaging in commercial ventures versus asking for donations. In 2013, only 31 per cent of BC residents agreed that non-profits in the province only ask for money when they really need it compared with 45 per cent in 2000, and over two-thirds of residents agreed that there are too many charities asking for donations for similar causes. On the other hand, nine out of ten British Columbian's believe that running a business is a good way for a charity to raise funds it can't

access through other sources. Additionally, almost two-thirds of residents agree that charities should not be taxed on business earnings if the earnings are used to support their cause (Lasby, David; Barr, 2013).

Beyond just public opinion, several studies have also supported the beneficial effects of revenue diversification on the financial situations of non-profit organizations. Purported benefits include spreading risk across funding sources (Frumkin & Keating, 2011), leading to increased stability and organizational longevity (Carroll & Stater, 2008; Frumkin & Keating, 2011) lower levels of financial distress (Frumkin & Keating, 2011), increased financial capacity and the ability to better leverage debt (Yan, Denison, & Butler, 2009). It should be noted that not all researchers agree that revenue diversification is the way forward, and many feel it may spread non-profits too thin chasing various funding streams rather than concentrating on one or two reliable funding sources (Chikoto & Neely, 2013; Frumkin & Keating, 2011; Wicker, Feiler, & Breuer, 2013).

Finally, revenue generating activities have become an attractive way for non-profits to expand their scope and increase their chance of successfully achieving their mission (Di Zhang & Swanson, 2013; Rich, 2015; *The Canadian Social Enterprise Guide 2nd Edition*, n.d.). Research has shown that managing a viable business to maintain a social objective can be mutually beneficial activities, as one grows, so does the other (Di Zhang & Swanson, 2013).

Thus, the emergence of social enterprises and enterprising non-profits has been accelerated in recent years. Studies show that non-profits are becoming increasingly dependent on commercial revenue (Elson & Hall, 2012; P. Hall, 2014; McKay, Moro, Teasdale, & Clifford, 2014). In BC alone, between 2010 and 2012, the sector increased by 55 per cent (P. Hall, 2014). In a study conducted by Peter Hall, a third of these organizations were surveyed and collectively

reported revenues of \$60 million in 2011 (P. Hall, 2014), meaning that the sector may represent \$1.8 billion in revenues. Further, the average enterprising activity netted \$45,000 in profits. Clearly, this is a rapidly growing industry that holds much promise for BC's non-profits.

Sector Challenges

However, as this is a relatively new opportunity and consideration for most non-profits, there are many challenges facing charities wanting to launch revenue-generating activities. Best practices are still being developed (Elson & Hall, 2012), and there has been little research conducted on the support needs of enterprising non-profits (Spear, Cornforth, & Aiken, 2009). Research highlights three major areas of challenge for non-profits: long-term stability and sustainability, gaps in capacity and partnerships, and barriers presented by marketing and sales needs as well as geographical location. Each of these are explored in more depth below.

Long-term stability and sustainability.

Non-profits often lack the business and financial knowledge to provide sufficient long-term stability and sustainability to ventures undertaken. This is felt particularly keenly in small to medium sized charities as they often do not have the funding needed to hire executive directors with that capacity. Thus, many non-profits are led by people who have deep program knowledge but limited business and financial knowledge (Deshmukh & Francis, 2015). Additionally, there are limited resources that exist to assist them in developing this knowledge (Deshmukh & Francis, 2015; Sobolov, 2010) which can act as a barrier to innovation (Williams, 2014). This is further compounded by the lack of established best-practices and organizational models of enterprising ventures (Defourny & Nyssens, 2008; Galera & Borzaga, 2009) as well as performance measures (Arena, Azzone, & Bengo, 2014).

Unsurprisingly, lack of sustainable funding is another large challenge for enterprising non-profits. Enterprises often require seed funding (P. Hall, 2014; Sobolov, 2010) which can be difficult to obtain for non-profits that are already struggling to make ends meet (Beachy, 2011; Deshmukh & Francis, 2015; Struthers, 2005). Funders prefer to fund specific programs rather than building capacity for longevity or effectiveness in the long-term such as funding a new enterprising venture (Kapucu, Healy, & Arslan, 2011). Thus, sustainability is a challenge that most non-profits must contend with when pursuing revenue-generating activities (Sontag-Padilla, 2014).

Gaps in capacity and partnerships.

Additionally, non-profits are facing an increasing demand for services without the staff capacity to meet these (Deshmukh & Francis, 2015; Kahnweiler, 2011; Kapucu et al., 2011; Misener & Doherty, 2009). This is in addition to a potential leadership crisis on the horizon with the upcoming retirement of many baby-boomer generation leaders (Kahnweiler, 2011). Lack of staffing capacity leaves non-profits deeply vulnerable, particularly small organizations (Deshmukh & Francis, 2015) and limits the capacity available to attain goals such as launching a new commercial activity (Misener & Doherty, 2009).

Further, many non-profits were found to struggle in developing partnerships outside of their organizations. While much research exists on studying effective collaborative initiatives (E. Proulx, A. Hager, & C. Klein, 2014; Neuhoff, Milway, Kiernan, & Grehan, 2014), a few key studies also highlighted that non-profit financial vulnerability decreases the likelihood of collaboration (MacIndoe & Sullivan, 2014; Neuhoff et al., 2014). Beyond lack of funding, finding connections of value as well as previously failed attempts also contribute as common

barriers to non-profit collaboration, which leads to missed opportunities for shared costs, knowledge-exchange and joint ventures (Neuhoff et al., 2014).

Marketing, sales and locational barriers.

Non-profits wanting to develop commercial ventures are also faced with the challenge of marketing and sales, something that is typically beyond the scope of knowledge of non-profit managers (Deshmukh & Francis, 2015; Kapucu et al., 2011). Research indicates that branding considerations are often overlooked in the third sector (Sontag-Padilla, 2014) with a key challenge being the ability to create real understanding of branding and sales techniques within the organization (Chapleo, 2013). Perhaps unsurprisingly, of those in formal marketing roles within charities, only one-fifth have training in marketing (Dolnicar & Lazarevski, 2009).

Finally, research indicated that the geographical location of the non-profit can also present significant challenge if the charity is based in a rural or remote location (Group, America, Neuhoff, & Dunckelman, 2015; Neuhoff, 2011; Swierzewski et al., n.d.). Rural and remote non-profits wanting to develop enterprising activities face heightened levels of challenge in finding and retaining competent staff (Swierzewski et al., n.d.), connections to funding sources (Group et al., 2015; Snavely & Tracy, 2000), and non-profit resources or partnerships (Group et al., 2015; Neuhoff, 2011; Swierzewski et al., n.d.).

Impact of Capacity Building in Non-Profits

It is evident that non-profit organizations pursuing enterprising activities are in need of support to overcome these significant challenges (Sobolov, 2010). In this emerging field, resource and funding networks and organizations are relatively small in proportion to the number of charities, and in Canada the majority of them are located in Ontario leaving BC non-profits with a limited pool of resources (Social Enterprise Council of Canada, 2015). There is a dearth of

research available on the impacts of these, so research on more general capacity building activities offered to non-profits was conducted. This research reveals three major areas of impact felt by charities that pursued capacity-building activities: organizational and leadership development, community engagement, and finally revenue and program development (Minzner et al., 2013).

Organizational and leadership development.

Capacity-building initiatives have the ability to increase both organizational and leadership capacity (Minzner et al., 2013). Organizations that undertook capacity-building activities could directly attribute increases in organizational control and monitoring systems, development of personal leadership plans for executive staff and the integration of evaluation findings into their strategic planning (Bies, 2007). Further, research indicates that capacity building programs positively influence perceived organizational effectiveness (Broxton, 2012). Finally, organizations also reported greater understanding of evaluation strategies, grant-writing knowledge as a result of capacity-building training (J. Sobeck & Agius, 2007; J. L. Sobeck, 2008).

Community engagement.

In addition to organizational and leadership development, capacity-building also contributes to higher levels of community engagement, particularly in terms of establishing strong connections with other non-profits (Minzner et al., 2013). Network relationships were shown to be strengthened and developed after non-profits participated in capacity-building activities (Kapucu, Naim; Demiroz, 2013). Further, significant co-learning was found to have occurred, with extensive information sharing between agencies (Kapucu et al., 2011). Finally,

many non-profits also reported being able to better leverage community resources and get more people involved in their cause, such as more volunteers (Minzner et al., 2013).

Revenue and program development.

Finally, capacity-building initiatives were shown to increase the size and scope of both revenues and programs (Minzner et al., 2013). Perhaps unsurprisingly, program and revenue development were linked to organizational development, both increased through capacity-building (Broxton, 2012). Building on this, research indicated that capacity-building initiatives focused at strategic planning had the eventual outcome of not only improving existing services but also the ability of non-profits to sustain and expand their programs, even in an uncertain environment (Hu, 2014). Finally, capacity-building strategies were proven to have an impact on organizational operations, enabling non-profits to more effectively and efficiently achieve their mission (Kapucu et al., 2011).

Thorough review of both academic and industry reports indicate that the trend towards non-profits engaging in enterprising activities is driven by both necessity and the large opportunity it provides to expand their scope, achieve their mission, and secure financial stability. However, the task is not an easy one, and charities face many challenges when attempting to launch a social enterprise venture. Although research is lacking in what capacity-building initiatives focused on assisting non-profits in launching or growing revenue-generating activities, it is clear that capacity-building has been proven to benefit non-profits in general. The question remains whether capacity-building initiative focused on revenue-generation will produce the same quality and scope of results. The paper will now review the primary research to explore this and the other themes presented above in more depth.

Summary of Primary Research Findings

To further explore and build upon the themes that emerged from the secondary research, surveys were sent out in January 2015, and followed by a focus group held in February and phone interviews conducted in both February and March. Primary research explored both the level and scope of impact reported by past clients of *ENP*, as well as current challenges felt and finally future suggestions. Findings confirmed that *ENP*'s capacity-building activities enhanced organizational and leadership development, increased community engagement specifically through networking and knowledge-sharing, and finally also contributed to an increase in revenue and program development. Further, results indicate that non-profits face significant challenges when attempting to pursue revenue-generating activities including long-term stability and sustainability, gaps in capacity and partnerships as well as challenges presented by marketing and sales and physical location. These are discussed in greater detail below.

Impact of ENP's Activities

To inform the development of *ENP*'s value proposition, research was conducted to determine the level and types of impact *ENP*'s activities had on its past clients. The level of significance attributed by clients was explored, with attention given to both grant-recipients and clients who had connected without receiving funding. Additional exploration revealed common themes that charities identified as the most significant impacts of *ENP*'s services.

Significance of impact.

Clients were asked to distinguish the level of significance that impacts from *ENP*'s services had had on their organization. A divergence between the levels of significance reported by grant recipients versus those who did not receive a grant quickly emerged. Of grant recipients, two-thirds reported that *ENP* had a fundamental or substantial impact in terms of organizational

knowledge and planning or improving existing or new processes or programs. This number drops by half when exploring impact reported by clients who did not receive a grant.

However, this still leaves a third of non-grant recipient clients who indicated that the information they gleaned either through the workshops, toolkits or conversations with *ENP* was sufficient to produce a high level of impact. This is important confirmation of the relevance and value of *ENP*'s work, even when funding is not provided to client organizations. Conversations with past clients, both those who were grant recipients and those who weren't, confirmed this. Many organizations identified the workshops and toolkits as sources of invaluable information that helped to stimulate or inform central processes in the planning and development of revenue-generating activities.

Also of note is that there was a small sampling of past clients who expressed significant levels of discontent with *ENP*'s services, both in the survey and phone interviews. Worth mentioning is the fact that of the two phone interview respondents who were unhappy with *ENP*'s services, both were arts organizations, unconnected to one another, who indicated they felt that *ENP* had a bias against arts and culture initiatives. While these represent an exception rather than the norm, they provide *ENP* with helpful context that may be used to further explore the sentiments and feedback given by disgruntled or disappointed past clients. This affords *ENP* the opportunity to determine whether there are areas for growth in either the addition of services, or simply offering further clarification of the limits of *ENP*'s service offerings to manage expectations of future clients.

Organizational and leadership development.

Clients overwhelmingly agreed that their interactions with *ENP* contributed to increased organizational capacity, particularly in terms of business knowledge. This was consistent across

the full spectrum of clients, irrespective of whether or not they were grant recipients, and regardless of how long it had been since they had last interacted with *ENP*. This is a valuable glimpse at the potential long-term impacts of the knowledge and training *ENP*'s services invest in its clients. Clients repeatedly mentioned a shift in mindset of key leadership, adding a business lens to organizational planning and processes. According to one client, "We learned a new skill set: how to approach our enterprise from a business perspective rather than non-profit. It was an amalgamation of the two." Another client explained, "We were fumbling in that direction and *ENP* offered the framework for us to define and enhance what we were doing...it helped us grab on to that framework and explain what we were doing."

Connected to the theme of business knowledge, the majority of grant recipients and a significant portion of other clients also identified an increase in entrepreneurial spirit and focus in their organization as a result of the services provided by *ENP*. As two clients put it, "it made us more entrepreneurial," and "it reaffirmed and solidified our entrepreneurial spirit." Clients mostly cited the launch of new business ventures when referring to this increase, with many directly attributed these launches to the training, support and services received through *ENP*. One client mentioned that not only had they launched the originally-proposed venture, but also a supporting project as a result. Of note is that many clients commented on this increase in entrepreneurial focus permeating their staff teams, but having difficulties passing this same excitement and focus on to the Board of Directors level.

Finally, *ENP*'s workshops and toolkits were widely considered of great value to past clients. Many respondents identified their initial attendance at the workshop as a critical inflection point that lead to a new direction and further exploration of business opportunities. Clients appreciated the relevance of information presented at the workshops, particularly

information that was outside of their realm of expertise such as business planning or alignment with the Canadian Revenue Agency's charity guidelines with respect to running business ventures. This aligns with the findings from ENP's post-workshop surveys which indicate high satisfaction rates (enp-BC, 2014). Respondents also made significant use of the hardcopy resource packages, recognizing the wealth of knowledge represented in these tools, and indicating that these had led to the development of a knowledge base, particularly within key staff. Some clients also mentioned the online resources, though many indicated they had not explored them in great depth.

Unique to grant recipients was the identification of the positive impact of having an external business perspective provided to senior executive staff and their boards. The provision of granted funds to hire external consultants was widely appreciated, largely in part to the level of expertise these consultants were able to bring to the table. Clients particularly appreciated the autonomy and flexibility afforded to them in allowing them to select their consultants, rather than consultants being assigned to them. Clients cited this as a significant value-add, as it offered them the chance to seek out tailored assistance that they felt best suited their organizational needs. This was widely mentioned as something that created lasting impact in terms of internal organizational knowledge and development.

Clients further cited the benefit of having an objective and authoritative analysis of their situation. Respondents indicated that this was helpful on a number of levels, including convincing board members from a variety of backgrounds, providing valuable industry insight that was beyond the organization's realm of expertise, and finally providing objective and unbiased advice. Of particular interest was that many clients were very happy with the results of the consultation even when they resulted in a proposed initiative being rejected and subsequently

abandoned. One client succinctly put it, “We saved valuable time and money by not pursuing that initiative. We needed that external expertise that was not tied to the project and could provide an objective analysis of whether or not it was likely to produce funds. If we had pursued it, we would have been unsuccessful.”

Finally, many grant recipients identified their inability to pay for or perform such consulting activities without the grant. Clients expressed a lack of funds for consultation, a lack of in-house knowledge and expertise, and a lack of time to devote to such a thorough analysis. Respondents indicated that the ability to pay for an external expert to devote the time to research and analyze the business opportunities at hand was invaluable, and typically well beyond their own capacity. Many indicated that it was difficult to pin-point the extent of the true value of these services and the impact that subsequently permeated their entire organization.

Community engagement.

In addition to organizational and leadership development, clients also identified the value felt in connections built with other organizations during their utilization of *ENP*'s services, particularly attendance at the workshops. Respondents noted that workshops provided an opportunity for many diverse organizations from the surrounding areas to come together and build relationships. Clients consistently mentioned this as a valuable outcome of attending the workshops. Of interest, one organization identified the business-planning process, which was conducted with granted funds from *ENP*, as having the unanticipated effect of increasing their organization's reputation of legitimacy in the community.

Tied to the concept of building connections was the oft-cited impact of being able to exchange knowledge and ideas. Clients commented on the value of learning best-practices from peers present in the workshops, and the inspiration that other local charities provided when

sharing their experience of launching a new initiative. Breakout groups in the workshop were also referenced when describing the ability to share information and ideas – many cited the ability to bounce ideas off of other organizations and receive feedback as incredibly helpful.

Revenue and program development.

In addition to community engagement, clients also identified an increase in the diversification of funding streams, specifically with addition of new types of revenue-generating programs and activities as a result of *ENP*'s services. As expected, this was more prevalent among grant recipients, who were then able to hire a consultant to guide them further in this process, than among clients who had not received a grant. Most interviewees reported they currently run more revenue-generating ventures than before their connection with *ENP* and many directly attributed this to the services provided by *ENP*.

Directly linked to the increase in diversified funding streams is the subsequent impact of increased revenues. Survey results revealed a percentage increase of up to ten times in earned revenues when viewed as the proportion of client organizations' annual income. It should be noted that most of these are attributed to organizations who had a very small percentage to begin with. However, even many of those with larger baselines saw sustained increase of significance – in many occasions, an additional ten to twenty percent of overall income. Further, a significant portion of interviewed clients attributed substantial increases directly to *ENP*. As one respondent reported, “*ENP* has directed attributed to this: both faster growth and more strategically than it would otherwise have been.”

As noted earlier, there was a small portion of grant recipients who indicated they chose not to launch their proposed initiatives. Results from the feasibility study or business planning process revealed that the initiative was unlikely to be successful, and might become a significant

drain on resources. These charities rated this service provided through grant-funded external consultants as invaluable, and saving them significant resources that would likely have been wasted chasing an ill-planned initiative. Although not a direct increase in revenues, clients attributed the avoidance of sunk costs to *ENP*'s services.

Current Client Challenges

In order to understand current gaps and unmet client needs, time was given to explore current challenges non-profits are experiencing. Although there were a number of challenges that were niche-specific, many common themes emerged across the surveys, focus group and interviews. Charities reported that their most significant challenges were long-term sustainability, gaps in capacity and partnerships, and barriers presented by sales, marketing and geographical location. Each of these are explored in greater depth below.

Long-term stability and sustainability.

A widely-touted challenge in both the focus group and interviews was the lack of capacity for strategic business planning to provide long-term stability and sustainability. Clients consistently reported they lacked the internal knowledge needed to plan for the future, specifically when considering enterprising activities to diversify and increase their revenue sources. Most cited a background in human services or arts rather than business as the largest contributing factor to this issue. Of particular interest is that this finding was irrespective of whether or not they had received a grant assisting them in this in the past. When further exploring this with past grant recipients, many reported that although they saw a significant increase in organizational and leadership knowledge, they still feel they have only just started the journey and continue to require assistance in this area.

Contrasted with lack of internal knowledge, some clients reported that their biggest inhibitor was actually lack of time or money. One organization succinctly commented, “If we had the time, we could do it – but we don’t.” Clients reported it was difficult to keep strategic planning in focus, particularly if they are also struggling with staffing constraints, discussed in depth later. Connected to this is a lack of money available to allocate to strategic planning. Respondents reported that both funding restrictions and overall funding challenges make hiring external consultants difficult.

Further, in regards to long-term stability, securing sustainable funds was a consistent challenge mentioned in the surveys, focus group and interviews. In particular was the common struggle to find operational funds that can be directed towards general staffing or overhead costs. Many cited funding that came with many strings attached – typically that funds be used only for specific programs or projects, often only available for a short time. Frustration in this regard was noticeably high. Two survey respondents commented, “Funders who do not understand the funding we really need – it [*funding*] continues to be project-based, based on what funders think is relevant,” and, “Funding is based on political climate; administrative funds are reduced more and more, but admin is essential to any operation.”

Tied to the challenge of accessing sustainable funds was the consistent commentary on government funding cuts and subsequent impacts. Several interviewees mentioned that funding had been markedly reduced due to cutbacks in government funding over the past few years, and that it was substantive enough to necessitate the development of new revenue streams, such as corporate sponsorships. As a result, more and more charities are then competing for these other resources, which a number of interviewees commented on.

Gaps in capacity and partnerships.

Beyond long-term sustainability, many clients reported a struggle in recruiting and maintaining sufficient volunteer support. Most respondents were niche-market organizations, faced with a limited number of potential stakeholders due to constraints in public profile, perception of cause, and the location of the charity – particularly those in rural areas. Many respondents identified that board members were often left “doing it all.” This was a particular challenge for smaller organizations. As one survey respondent wrote, “[We] do not have the resources to hire full time staff, so huge burden is placed on Board of Directors to work for free. This is probably not sustainable in the long term.” When interviewees were asked whether volunteer support was a challenge, most responded with playful sarcasm, “when is it not?” and indicated that they considered it to be a never-ending challenge.

Further, many respondents indicated that they felt both they and their staff teams were consistently overtaxed. A quarter of all survey respondents reported it was a challenge to maintain a strong, long-term staff team. Interviewees also reported similar struggles. One respondent tellingly commented, “It’s that old cliché – we’re underpaid and overworked!” Another interviewee remarked, “We’re trying to do it all with limited resources and time.” A number of respondents commented on growing workloads and concerns that staff may burn out.

Finally, some clients commented on the challenge around creating strategic staffing plans. Those that were experiencing positive growth worried that they had grown too quickly and that staff may not be in the right roles. They lacked an overall plan to demonstrate how roles contributed to the wider organizations’ long-term missions. For others, the challenge was more about creating a plan to attract the right people. Finally, some clients voiced concerns around

succession planning, particularly those that had one or more senior executives that had been in the same position for over a decade.

Another common theme that arose was the emergence of silos among charities. Most described it as a natural occurrence due to limited time and large workloads; however, participants reported that this separation was perceived by them as a challenge. One reason for this was the lack of knowledge-exchange and awareness around best-practices. As one interviewee described, “It’s really hard for individual organizations to get a good understanding of industry best practices when operating in silos due to capacity constraints – linking outside of their genre is really difficult and so the cross-sectorial connections just don’t exist.” Clients commented that they were unaware of any forum or medium existing to facilitate this learning and knowledge-exchange, and identified this as a missing opportunity for further growth and development.

The emergence of silos is further illustrated by the struggle many non-profits identified in building partnerships with other non-profits. Many identified their lack of local connections and wondered whether this may be a missed opportunity for joint ventures or cost-sharing initiatives. In the focus group, two clients were able to assist each other as a result of one of the discussion questions. This prompted reflection in the group on how, if even in this small setting a connection was formed that provided mutual benefit, larger or more regular gatherings may also offer further opportunities of this type.

Marketing, sales and locational barriers.

Sales and marketing challenges.

A number of charities identified sales and marketing as a struggle. Sales are unique to revenue-generating ventures, but marketing was cited as a challenge across the board.

Respondents reported they felt their organization lacked adequate sales and marketing plans, and that there was no plan in place to engage their local community. One client outlined their challenge in this way: “The marketing budget is way too low, but it’s a chicken and egg thing – maybe if we put more money into marketing it’d bring in more revenue from the public, but we don’t have that money to put in.”

When discussing the challenges related to developing a marketing plan, many attributed these struggles to a lack of knowledge in marketing. Clients mentioned a lack of marketing background, and being at a loss as to what would resonate with the public. One charity that had developed a small gift shop as a revenue-generating enterprise mentioned that they needed an external consultant to assist them in deciding on inventory because “we really don’t know what will sell.”

Unique rural challenges.

Finally, many respondents identified having a rural or remote location as presenting a unique set of challenges. Lack of resources was the largest concern. Rural non-profits reported a lack of resource-bodies, granting agencies, connections, and staffing to name a few of the challenges. Lack of local expertise, both in external contacts or in available people to hire was felt particularly keenly. This was closely followed by a lack of funding opportunities due to the dearth of funding organizations located outside of urban centres.

Connected to this was the struggle of business opportunities for rural and remote non-profits running social enterprise ventures. One client mentioned the difficulty of selling products to the small local population, whereas another cited challenges involved in the logistics of operating a business in a remote location. Still another interviewee described a scenario in which the organization had worked for many years to launch an enterprise that met a felt-need in their

community. However, only a year after their launch, a change in legislation meant that this need would finally be funded by the government, even in remote communities. As a result, the operation was shut down completely, leading to the feeling of having wasted many years of planning. Overall, responses indicate that rural non-profits face unique challenges that require tailored solutions.

Client-Proposed Services

Finally, clients were asked to suggest future services they would like to see offered by *ENP* to gain a fulsome understanding of both currently perceived gaps in service offerings as well as opportunities for future growth and expansion. Survey participants were asked to pick from a list and given a free text box to suggest alternative offerings. In the focus groups and interviews, the question was open-ended, allowing for greater depth and concentration on client-identified solutions. A number of common themes arose including expanding the current grants and workshops offered, providing longitudinal support, offering regional events and peer-learning opportunities as well as virtual supports. Each of these are briefly explored below.

Grants and workshops.

Many clients expressed interest in a wider variety of grants, and were mostly unaware of what further funding opportunities *ENP* provides. A number of clients indicated they would like to see funding provided for a variety of grants, such as funding that could be used to hire specialist consultants for more focused analyses such as developing a staffing or marketing plan. Other respondents indicated a strong desire to see grant funds attached to a return-on-investment (ROI) and cost-benefit analysis. Some clients were aware they could reapply for future funding, but most were not aware of this, or confused about what was permitted; further, the majority of those who were aware indicated they were unsure what the next step would be and what they

would put the funding towards. Most clients were unaware of what other types of grants *ENP* provides beyond funding for feasibility studies or business plan development.

Most respondents had only attended the workshop once and expressed that they would not attend again unless there was new content. A number of interviewees commented that they would like to see “next level” workshops that build on the first one, with more advanced content. However, it should be noted that a small portion attended more than once and identified value in repeat attendance, indicating that they learned new things each time due to being in a further-evolved state each time, and thus picking up on different content within the same workshop.

Longitudinal support.

Longitudinal support was another very common theme. Many charities reported that they had significantly progressed as a result of the support *ENP* provided previously, but that this had the unanticipated effect of bringing them to a new level of challenges. Grant recipients indicated they had no connections or funds to seek out further support, and that it would be ideal to have support from the same external consultant that had helped them through the business planning process or feasibility study. A few suggested that *ENP* consider keeping a consultant on retainer or hire one in-house so that past clients could reach out on occasion for further support. As one client reports, “Initial funding for the business plan helped, but now we need more mentoring/consulting – we’re stuck at next level.”

Additionally, a few charities, some who were grant-recipients and some who weren’t, reported that *ENP* had provided direct support in the form of coaching or analysis. This process had been very helpful resulting in growth and often the launch of a new initiative, but now some of these charities were at a loss as to how to move forward. Clients consistently viewed *ENP* as the key knowledge-holder in the sector, and most clients had the perception that *ENP* has the

capacity to expand services, and did not seem to be aware that it is a small two-person-run operation.

Many clients that indicated they needed longitudinal support seemed completely unaware of the many other offerings *ENP* provides. Clients often suggested ideas for further supports without realizing that *ENP* has in the past, or currently still offers, such as the *Social Enterprise Heroes* initiative. Further, clients consistently reported a lack of knowledge around what services are currently offered, whether or not they are eligible for them, and how to find information on them.

Regional offerings, peer support and online resources.

Charities located outside of the Lower Mainland were quick to suggest the addition of further regional supports or offerings. Ideas ran the gamut of having more regular regional forums, to having access to experts they could reach out to. Most clients perceived *ENP* as having strong partnerships in the industry and able to provide opportunities such as these. Clients did not report awareness of current or past *ENP* regional offerings beyond the initial workshop, such as *ENP*'s regional *Days of Learning*.

Finally, clients identified a desire for *ENP* to develop or facilitate further peer-to-peer learning and networking opportunities. A third of survey respondents identified this as a way they would like to be connected with *ENP* in the future. Both focus group participants and phone interviewees also raised this idea, with a few suggestions such as hosting a forum to discover best practices, or to start local and regional networking groups. As indicated previously, most clients were unaware that *ENP* runs regional Days of Learning, and had not heard about the Social Enterprise Heroes initiative.

While a significant number of clients identified a wealth of information available online, the majority (four-fifths of survey respondents) did not report accessing web resources. Further, in the focus group and interviews, participants acknowledged that while the information online was very helpful, there seemed to be too much of it, and hard to sort through to find the information that was most relevant to their specific organization. However, the majority of respondents indicated they would be interested in accessing *ENP*'s resources online in the future. Finally, a number of clients suggested the possibility of webinars or other resources, and did not seem to have reviewed the current online offerings.

In summary, primary research explored the level and scope of impact reported by past *ENP* clients, along with both current challenges and future suggestions. Results revealed that *ENP*'s capacity-building activities enhanced organizational and leadership development, increased networking and knowledge-sharing in the sector, and also contributed to an increase in revenue and program development. Additionally, findings indicate that enterprising non-profits face a number of key challenges including longevity and sustainability, gaps in both capacity and partnerships, and also challenges associated with marketing, sales and physical location. These results will now be analysed alongside secondary research findings to highlight important emerging themes.

Analysis and Discussion

The purpose of this OMP is to inform both *ENP*'s value proposition and future opportunities by determining the impact of capacity-building initiatives on enterprising non-profits as well as current unmet industry needs. An analysis of secondary and primary research revealed that ENP is meeting a felt need and providing significant value to clients, but to further solidify its value proposition it will first need to address some areas for improvement. Further, analysis revealed that ENP's services are well-suited to market needs, but that some work remains to be done to best position these offerings to sustain its reputation as the clear market leader in the future. These themes are discussed in greater detail below.

Informing ENP's Value Proposition

Research reveals that social enterprise is not merely a new fad or current trend that is likely to fade out soon. In recent years, a number of factors have contributed to the emergence of this new sector. The charitable sector is growing at a rapid pace (Blumberg, 2008; Imagine Canada, n.d.; Payne, 2012b; Spyker, 2011). Meanwhile, both secondary research of sector trends (Aymot, 2013; Bull, 2008; Frisk, 2013; Imagine Canada, 2014; Payne, 2012b; Statistics Canada, 2015) and primary research of anecdotal observations confirm that funding sources are shrinking for the average non-profit. The result is that increasing numbers of charities are competing for a diminishing funding pools.

As the funding landscape is shifting, widely-publicized research on the benefits of revenue diversification and the commercialization of non-profits has begun to proliferate the non-profit industry. These benefits run the gamut from reduced volatility, to being able to better leverage assets to achieve a greater impact on the non-profit's mission (Carroll & Stater, 2008; de Véricourt & Lobo, 2009; Mayer, Wang, Egginton, & Flint, 2012; Wicker et al., 2013; Yan et

al., 2009). Finally, public opinion supports the concept of non-profits engaging in commercial activities to support their cause (Lasby & Barr, 2013).

Evidently, the social enterprise sector is here to stay. Non-profits are in need of new funding streams, and enterprising activities provide a unique opportunity to complement their existing work and mission while bringing in much-needed revenue. However, both secondary and primary research revealed that charities feel out of their depth (Deshmukh & Francis, 2015; Williams, 2014), and face many challenges when attempting to launch or expand revenue-generating activities (Deshmukh & Francis, 2015; Kahnweiler, 2011; Kapucu et al., 2011; Misener & Doherty, 2009).

Secondary research demonstrated that capacity-building activities have significant impacts on non-profits (Minzner et al., 2013) and it was posited that *ENP*'s offerings provide similar benefits to their clients. Primary research confirmed this, with past clients consistently reporting strong impacts in all three areas identified in secondary research: organizational and leadership development, community engagement, and revenue and program development (Minzner et al., 2013). The one exception was that client did not report *ENP*'s services as helping them to leverage more community support such as getting more volunteers involved. However, this is unsurprising as *ENP*'s services do not emphasize this subject, and serve a more focused purpose in assisting charities in developing revenue-generating activities. Overall, it is evident that *ENP* is meeting a felt-need and providing significant benefit to client organizations.

This research serves to inform *ENP*'s value proposition. The social enterprise is a new and burgeoning sector that the majority of non-profits will eventually need to enter. They face many challenges and need ongoing support. *ENP* is providing this valuable support.

However, to truly solidify it and be able to communicate it to both clients and funders past, present, and potential, there remain three areas for improvement: *ENP*'s capacity constraints, underleveraged outcomes data and the lack of a comprehensive communications and stakeholder engagement plan. To move forward, *ENP* needed to address each of these, as discussed below.

***ENP*'s reputation and capacity.**

Primary research findings clearly reveal that *ENP* is highly regarded as a provincial leader and key knowledge holder in the realm of social enterprise and non-profit enterprising activities. In this relatively emergent field, resource bodies are few and best practices are still being developed (Elson & Hall, 2012). Secondary research revealed only a few major players, particularly in the Canadian scene, and the majority of these are located in Ontario (Social Enterprise Council of Canada, 2015). Thus, BC non-profits have little other supports available to them, and view *ENP* as an important well-positioned resource body meeting a felt need. It is clear is that *ENP* has an interested client base that would welcome an increased scope

Further, there seems to be little awareness in clients that *ENP* is a small two-person-run operation, due to the extent of services and support offered, and the level of connectedness and profile *ENP* has in BC. However, *ENP* does have significant constraints due to their size and scope. Time, funding and personnel are limited. Naturally, these limitations have a number of by-products such as an outdated website, underutilized outcomes data and gaps in communications.

ENP is faced with a strategic consideration of what will produce the highest return on investment in order to best utilize their existing resources and further differentiate their value proposition. The findings of this research reveal a number of key opportunities that warrant

further review and exploration, however these opportunities may lie beyond *ENP*'s current capacity. To best leverage these opportunities, *ENP* will need one of two things: either an infusion of extra funding to expand program scope, or a creative alternative that achieves the same end with limited or no extra funding needed. Additional funding is difficult to secure in this small market, so *ENP* needs a creative alternative.

While *ENP* has a significantly constrained capacity due to the small size of this organization, it uniquely positioned, well-connected and highly-regarded in the social innovation and finance sector. *ENP* holds a number of strong partnerships and is missing a key opportunity to leverage these in order to increase its capacity. *ENP* is providing non-profits with the capacity to build partnerships and have external consultants provide expert advice, but it is not pursuing similar opportunities for its own operations. *ENP* needs to capitalize on its strong reputation and market position and leverage existing partnerships or create new ones to broaden its current capacity in order to further establish itself as the market leader in BC.

Capturing and leveraging outcomes data.

Primary research confirmed that *ENP*'s services provide significant benefit to clients, however, this data is currently underutilized by remaining unconnected to the broader whole. For example, *ENP* has a plethora of past workshop evaluations, as well as many years' worth of grant outcomes reports that are mandatory for grant recipients, but these data sets are not connected nor reported in depth to stakeholders. *ENP* lacks an overarching, strategic plan for both capturing and leveraging client outcomes data. There is limited ability to follow trends and notice gaps or opportunities on an ongoing basis. These gaps hamper internal strategic planning efforts, as it is difficult to assess trends when *ENP* is only able to review mostly isolated data.

Further, *ENP* is significantly constrained in its ability to tell its story and communicate the true value of its services and supports. The research findings in this project demonstrate on an anecdotal level that *ENP* is meeting a felt-need in the market, however it remains difficult to assess areas that produce the most return on investment without ongoing, longitudinal data. Accordingly, past annual reports are limited to outlining activities rather than impact.

ENP is not alone in this regard, secondary research revealed that there is a dearth of research to assess social enterprise organizational capacity building initiatives, particularly evaluations criteria or ROI-assessment methods (Arena et al., 2014). However, it is apparent that *ENP* is in critical need of capturing longitudinal data to assess and report on their long-term impacts and to assist in future strategic planning. In order for this to happen, *ENP* will require a new, cohesive reporting structure that integrates data from its various offerings, and follows clients through the progression of services and supports accessed. This in turn may require further review of current offerings to determine how to best link services across a continuum that is clearly understood by clients.

Communications and stakeholder engagement.

Finally, research demonstrated that while *ENP* is producing strong impacts and provides services that are meeting a felt-need, they have yet to have developed a way to keep many of their stakeholders engaged over a long period of time. Primary research was conducted with clients who had not been in contact in over three years. The majority of these clients were very satisfied with their previous interactions with *ENP* and reported they had been positively impacted by *ENP*'s services. Additionally, many of them consistently indicated they would be interested in further interactions with *ENP*. Lastly, the challenges they reported were by and

large within the scope of *ENP*'s offerings, meaning that it is likely they would benefit from further interactions.

This provides valuable insight into a gap presented by the lack of a comprehensive communications and stakeholder plan. *ENP* is missing a vital opportunity to re-engage with past clients and ensure current and future clients remain engaged. Further, *ENP* is constrained in its ability to tell its story and share its unique value proposition with a broader audience. Even if *ENP* revamps its outcomes and reporting system, unless it has a comprehensive communications and stakeholder engagement plan to share the impact it is having, it will continue to struggle with long-term client and stakeholder engagement. Further, it will be difficult to attract new partners or potential funders.

Longitudinal, Accessible and Networked Support

Despite its size, *ENP* has a surprisingly robust service offering mix coupled with a wealth of sector knowledge. Beyond offering the basic workshop it is most known for, *ENP* also runs regional *Days of Learning*, hosts several networking and peer learning events, runs an annual Social Enterprise version of *Dragons' Den* (CBC, 2015) called *Social Enterprise Heroes*, is involved at the regional, provincial and local levels of public policy and has been involved in task forces that contributed to the development of new legislation that eventually launched the C3 offering. Additionally, the website is home to countless knowledge-based articles, webinars, white-papers and toolkits. Overall, clients are generally satisfied with *ENP*'s services.

Looking to the future, a few key themes emerged from the research as holding significant potential for *ENP* when considering future opportunities. Gaps were presented by past clients in terms of longitudinal, accessible and networked support. These themes align with secondary research on challenges faced by non-profits (Deshmukh & Francis, 2015; Kahnweiler, 2011;

Kapucu et al., 2011; Misener & Doherty, 2009; Swierzewski et al., n.d.; Williams, 2014). An analysis of these themes and the opportunities they provide to leverage and reorganize current offerings to capitalize on this opportunity to deepen the impact of its services as maintain its position as the market leader is discussed below.

Longitudinal support and clearly presented offerings.

A review of *ENP*'s services with past clients indicates that offerings are not expressly linked or communicated in a linear or connected fashion to clients. However, longitudinal support was a common request among past clients, and secondary research further confirmed that non-profits struggle with long-term sustainability (Deshmukh & Francis, 2015; Kapucu et al., 2011; Williams, 2014). A number of *ENP*'s services naturally lend themselves to a tiered offering package providing longitudinal support, but are not currently marketed as such. Clients consistently reported a lack of clarity around what would be the next step if they were to reconnect with *ENP*.

Further, primary research revealed there is considerable confusion or lack of awareness among past clients regarding what services *ENP* offers. It is possible that more recent clients are more aware and informed. *ENP* does have three themes presented for non-profits exploring revenue-generating activities: "learn," "plan," and "manage" (About enp-BC , n.d.). However, while some online resources are organized under these themes, many are not, and none of *ENP*'s other offerings, such as workshops and grants, are categorized by these themes. Unsurprisingly, clients interviewed consistently reported a lack of knowledge around what services are currently offered and how to find key information on them. Finally, clients also commented on the website feeling overwhelming with too much data presented, making it difficult to find the most relevant information.

Accessibility of offerings.

A large portion of research participants, and indeed of *ENP*'s whole client base, are situated outside of urban centres. These organizations face unique challenges, as evidenced in both secondary and primary research. However, they also play a unique role in their communities, and provide valuable services that address large social service gaps common in many rural communities not having to contend with the non-profit competition that is often present in urban settings (Snaveley & Tracy, 2000; Swierzewski et al., n.d.).

This rural client base experience higher-than-normal resource gaps due to lack of local supports in funding, expertise, and even staffing. *ENP* certainly cannot offer everything to everyone, and is constrained by geographical limitations and the difficulty in accessing these many communities spread out across BC on a regular basis. However, since this client base represents a significant portion of *ENP*'s clients, it presents an opportunity to review how *ENP* might leverage its current offerings or partnerships to better resource this unique set of clients.

Peer-to-peer learning opportunities.

Research further supported the importance of peer-to-peer learning and collaboration opportunities (MacIndoe & Sullivan, 2014; Neuhoff et al., 2014). Primary research supported the desire to form these partnerships, but also demonstrated that most non-profits feel that constraints in time and funding limit their ability to act on this. As a result, a dearth of strong partnerships, learning opportunities or collaboration initiatives was identified as a marked gap.

Many clients viewed *ENP* as uniquely positioned to respond to this need and facilitate learning and collaboration opportunities. Clients consistently reported viewing *ENP* as a connector organization providing expert-level guidance and distinctive opportunities to learn about enterprising ventures. Further, many clients identified training and learning about revenue-

generating activities as particularly unique, and not available in other settings that they are aware of.

Many cited the ability to learn from other non-profits who have seen some success in a similar venture as critical to enable them to move forward with their initiatives and ideas. Others identified the ability to discuss concepts presented by *ENP* with others in breakout groups in the workshops as adding significant value, and something that they would like to replicate in some fashion in the future. In some instances, *ENP* is already providing these opportunities, but past clients do not seem to be aware of this.

In summary, this OMP sought to inform *ENP*'s value proposition and provide considerations for future opportunities. An analysis of secondary and primary research revealed that *ENP* is indeed providing significant value to clients, but areas of growth remain to further inform its value proposition. Additionally, analysis revealed that *ENP*'s services are well-suited to market needs, and key areas for consideration in future opportunities lie mostly within leveraging current offerings.

Recommendations

Building on the analysis of research conducted, six recommendations are presented for consideration. The first three offer suggestions on how *ENP* can further inform and solidify its value proposition. The remaining suggestions offer strategies for future opportunities, by leveraging current offerings.

Enhancing ENP's Ability to Solidify its Value Proposition

Recommendation #1: Leverage reputation and partnerships to increase capacity.

ENP must first leverage its reputation and partnerships to increase its capacity before it can adequately address its business problem. *ENP* holds a number of key relationships with respected thought-leaders, researchers and funding organizations. These must be leveraged to secure either grants or ongoing funding to increase the scope of the organization. Additionally, in-kind or pro-bono partnerships should be cultivated, to add short-term staffing or consulting capacity for specific projects. A couple of small, short-term project-oriented grants or in-kind arrangements will be sufficient to develop the framework for the majority of the recommendations presented in this report.

Recommendation #2: Develop a cohesive outcomes collection and reporting plan.

To better capture and leverage outcomes data, *ENP* needs to review and revamp its reporting structure. Data required from workshop participants, grant recipients and other clients should be reviewed in parallel in order to establish a cohesive analytical framework that allows outcomes, opportunities and trends to be clearly identified through the various reporting structures. This framework should guide all data collection to ensure the process is focused and integrated across all offerings.

It is recommended that *ENP* build the plan to assess at a deeper level the three key areas of impact identified in research: *Organizational and Leadership Development*, *Community Engagement*, and *Revenue and Program Development*. This will assist in providing a clear picture of the scope of *ENP*'s work. Finally, the plan should include a method of soliciting ongoing, longitudinal data to enable *ENP* to report on the long-term impacts of their services. If reporting mechanisms are integrated, and data collected informs the value proposition, *ENP* will be better positioned to communicate the significance of its impacts to both clients and potential funders or partners.

Recommendation #3: Create comprehensive communications and stakeholder engagement plan.

Once data collection is revamped to better tell *ENP*'s story, *ENP* has the opportunity to re-engage past clients, broaden its client base and increase the potential for future partnerships. In order to do this, *ENP* requires a comprehensive communications and stakeholder engagement plan. The plan should consist of a thorough review of current and planned offerings as well as a stakeholder analysis, both analyzed against the outcomes data. Developing this plan will help *ENP* ensure they are highlighting their key offerings, leveraging their outcomes, and providing both existing and prospective clients and partners with a deeper understanding of how they can benefit from or get involved with *ENP*.

Providing Longitudinal, Accessible and Networked Support

Recommendation #4: Integrate and repackage offerings.

ENP has a unique opportunity to offer non-profits with clear, longitudinal support simply by integrating and repackaging its existing offerings. It is recommended that *ENP* make these connections clear to clients by repackaging offerings under their existing main resource themes

of “learn,” “plan,” and “manage, (About enp-BC , n.d.)” with the addition of the theme “grow.” *ENP* should reclassify these as “The Four Stages of Enterprising Non-Profits,” with each stage building on the previous. All funding, training, networking opportunities and resources should be categorized under these stages for ease of communication. Further, multi-stage granting opportunities should be created by repackaging current grant opportunities to facilitate greater likelihood of gathering long-term data.

Recommendation #5: Update and redesign website to increase accessibility to services.

Once *ENP*'s offerings are repackaged, the website should be updated and redesigned to include several landing pages to increase accessibility to these services. The BC website should reflect the same *Four Stages* and have an automatic redirect for visits from all BC-located IP addresses to a main landing page with these clearly presented. All online learning materials, webinars, and podcasts should be streamed into the appropriate stage. Further, the online article library should also be re-catalogued under these headings for ease of navigation. This will allow both existing and new clients to quickly find and access the resources and offerings that are most relevant to them. This is particularly pertinent for clients who are spread out in rural regions who have limited access to additional supports.

Recommendation #6: Create facilitated, cohort-based learning opportunities.

Finally, ENP should offer facilitated, cohort-based learning opportunities using its existing training offerings. This should start with its online learning streams in each of the four stages, which should be leveraged as online courses that are facilitated by a sponsor or partner, and are guided short courses that last 6-8 weeks and run in cohorts with the main material supported by homework and online forums to facilitate group learning and peer networking.

Either using open-source software, inexpensive small-business-focused platforms, or leveraging one of its academic partners, ENP can implement a small-scale learning opportunity to provide greater access and connections to their clients across BC.

Implementation

The recommendations presented above are listed in a sequential order to provide *ENP* with a comprehensive plan to move forward. Increasing *ENP*'s capacity lays the foundation to work on all further recommendations, and similarly the outcomes of each recommendation are contingent on the successful completion of the previous recommendation. As the first recommendation is the lynchpin for all others, focus in this section will be limited mostly to outlining what partnerships should be pursued to provide the capacity needed to implement each of the remaining recommendations.

Costs, Timelines and Phases

If *ENP* is able to successfully secure funding or partnerships that provide pro-bono or in-kind offerings, cost implications to *ENP*'s existing budget should be minimal. Work on the first recommendation should be started immediately as it will likely take three to six months to cultivate existing or new partnerships to provide the capacity needed to implement the framework for the subsequent recommendations. The remaining recommendations are grouped together below by three main implementation phases: *Data and Communications Revamp*, *Repackaging and Redesign*, and *Piloting Online Courses*. Phase timelines are dependent on the funding and partnership arrangements made, but will likely take a year at minimum to fully develop.

Phase 1: Data and Communications Revamp

A partnership with an academic institution or research firm should be secured to assist *ENP* in the restructuring of its data collection and analyzing methods, and utilizing this to develop a subsequent communications plan. Further, to promote ongoing sustainability, *ENP* should seek out interns or student placements to add ongoing capacity once the framework for

this new reporting structure has been established. It is recommended that *ENP* create an annual summer research assistant internship to provide ongoing data collection and analysis capacity.

Phase 2: Repackaging and Redesign

Once the first phase is complete, in-kind services from a strategic or marketing consultant or firm should be secured to begin the repackaging and redesign phase. The scope of work would include a new service packaging and design concept, as well as how to best separate existing offerings into the four stages. Once this is finalized, *ENP* should leverage its existing relationship with Telus as its technology partner (Social Enterprise Canada, n.d.) to redesign the website to reflect this. Finally, a volunteer or practicum student should be secured to review and sort all current online content into the appropriate categories. Additional help from Telus may be needed to replace outdated or incorrect links, and to complete the back-end of the sorting process.

Phase 3: Piloting Online Courses

Finally, a strategic partnership with an academic institution or another organization that is currently offering online learning such as the Public Health Service Authority (Provincial Health Services Authority in BC, n.d.), should be secured to develop the online learning platform. Alternatively, if funds are secured, a platform service can be purchased. In-kind consulting should be acquired to develop short-term curriculum and course plans from existing materials and resources for each of the four stages. A pilot group of engaged clients should conduct a test-run of the courses to provide feedback. Finally, thought-leaders should be approached to facilitate one or two courses per year to add to the credibility of the offering.

Conclusion

This objective of this research project was to provide an understanding of the challenges experienced by non-profits in BC seeking to develop enterprising ventures, and the impact ENP has had on these efforts. Further, the project sought to understand what future opportunities exist for ENP to increase their impact, by both enhancing and expanding their current services. Finally, the project sought to provide recommendations on how ENP's value proposition can be informed and communicated. Secondary and primary research, including surveys, a focus group and interviews were conducted to answer the research question, *How has training, resourcing and funding the development of revenue-generating activities effectively impacted non-profits in becoming more financially stable and increasing their capacity to fulfil their mandate?*

Secondary and primary research findings revealed that the emergence of enterprising activities conducted by non-profits is driven by both a shifting funding landscape, and the desire to further complement their mission. However, there are many challenges faced by non-profits that constrain their efforts including the difficulty associated with securing long-term stability and sustainability, gaps in both capacity and partnerships as well as barriers presented by marketing, sales and location. Research findings also confirmed that capacity-building activities in general, and ENP's services in particular, do contribute to non-profits' financial stability as well as their capacity to fulfil their mandate. Specifically, there are impacts felt in organizational and leadership development, scope of community engagement, and revenue and program development.

Thorough analysis of these findings demonstrated that ENP is meeting a felt-need but faces both challenges in communicating this impact, as well as opportunities to deepen this impact in the future. ENP's limited capacity, underutilized partnerships and outcomes data, as

well as a lack of a comprehensive communications plan constrain its ability to showcase the extent of its impact. Further, it became clear that enhancing its current offerings to provide more longitudinal, accessible and networked support is a significant opportunity for future growth.

Finally, recommendations were presented to assist ENP in both enhancing its ability to capture, communicate and leverage its outcomes and repackaging, redesigning and expanding its offerings. It was recommended that ENP leverage its reputation and partnerships to increase its capacity in order to implement the remaining recommendations. These included: developing a cohesive outcomes collection and reporting plan, creating a communications and stakeholder engagement plan, repackaging current offerings, redesigning the website, and finally piloting online courses. By implementing these recommendations, ENP will be well-positioned to continue pioneering social enterprise resourcing in BC, and be better-equipped to clearly demonstrate its ongoing impact.

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Appendices

A. Survey Questions

The following questions will be collected via electronic survey.

1. What type of organization do you represent?
 - Non-profit/society
 - Non-profit/society with charitable status
 - Coop
 - First Nation
2. Where is your organization located:
 - Lower Mainland / Metro Vancouver
 - Sunshine Coast/Squamish, Pemberton, Whistler
 - Vancouver Island
 - Fraser Valley
 - Okanagan
 - Thompson/Shuswap
 - Kootenay
 - Northern BC: Cariboo-Chilcotin/Lillooet
 - Northern BC: Northwest
 - Northern BC: Northeast
 - Northern BC: Prince George
3. What is the annual income of your organization?
 - Under \$100,000
 - \$100,000 - \$499,999
 - \$500,000 - \$999,999
 - \$1,000,000 - \$2,999,999
 - \$3,000,000 - \$4,999,999
 - \$5,000,000+
4. Approximately what percentage of your organization's income is **currently** from a revenue-generating activity (ie. contracts, sales rather than donations, grants, or interest on investments)?
 - None
 - Under 10%
 - 11-19%
 - 20-30%
 - 31-40%
 - 41-50%
 - 51%+
5. Before you were connected with ENP XX years ago, approximately what percentage of your organization's income was from a revenue-generating activity (rather than donations, grants, or interest on investments)?
 - None
 - Under 10%

- 10-19%
 - 20-30%
 - 31-40%
 - 41-50%
 - 51%+
6. How many different types of revenue generating activities does your organization **currently** run annually?
- None
 - 1-2
 - 3-5
 - 6+
7. How many different types of revenue generating activities did your organization run annually previous to your interaction with ENP?
- None
 - 1-2
 - 3-5
 - 6+
8. What types of revenue-generating activities has your organization run in the past two years?
- Select all that apply:
 - Sales of goods
 - Services
 - Program fees (fee for service)
 - Retail store
 - Rental of space
 - Other: Please specify (open text box)
9. How many staff does your organization currently employ?
10. How many staff did your organization employ 5 years ago?
- Under 5
 - 5-9
 - 10-19
 - 20-39
 - 40-59
 - 60+
11. What kind of interaction has your organization had with ENP in the past?
- Select all that apply:
 - Social Media
 - Attended workshop/learning event
 - Coaching/support via phone or email
 - Applied for grant
 - Grant recipient
 - Downloaded resources from website
 - Mailing list only (newsletter)
12. What prompted this connection?
- Select all that apply:
 - Wanted to be more entrepreneurial
 - Wanted to learn more about developing/diversifying revenue streams

- Recommended by another organization, colleague, friend, acquaintance, etc.
 - Wanted to apply for funding
 - Wanted to utilize website resources to assist in conducting feasibility study, action plan or similar
 - Personal connection
 - Other: (Please specify)
13. What, if any, impact did connecting with ENP have on your organization?
- Select all that apply:
 - Increased entrepreneurial spirit and/or capacity of organization (staff, board)
 - Improved decisions/conversations about revenue
 - Allowed for new ideas to be discussed/explored
 - Connections with other organizations
 - Provided important training and information (via workshops)
 - Provided funding
 - Provided toolkit that was used in organizational planning
 - Provided foundation of learning that was applied to the development of a new revenue stream
 - Provided contacts / networking
 - Other (please specify)
14. Overall, how significant of an impact has ENP had on your organization?
- Fundamental impact resulting in significant organizational change (increased revenue / decreased expenses)
 - Substantial impact supporting or improving existing or new processes / programs.
 - Significant impact in terms of organizational knowledge and planning
 - Some impact on small/limited aspects of the organization
 - Little impact
 - Does not apply
15. What are some of your organization's biggest current challenges?
- Select all that apply:
 - Securing sustainable funding streams for
 - Equipment
 - Personnel
 - Operations/Overhead
 - Accessing funds
 - Donations
 - Grants
 - Sponsorships
 - Equity
 - Debt
 - Capital
 - Sales/contracts/revenues
 - Strategic planning
 - Maintaining strong, long-term staff team
 - Shifting mission / vision or targeted clientele
 - insufficient volunteer support
 - Other (please specify)

16. How would these your organization like to be connected to ENP in the future?
- Select all that apply:
 - Attend future workshop
 - Apply for future funding
 - coaching/support (in person, phone and/or email)
 - be connected with other organizations (peer to peer learning)
 - Access online resources
 - Be added to social enterprise marketplace
 - Continue to receive email newsletter
 - be showcased in newsletter
 - Other (please specify)
 - Does not apply
17. What other resources would your organization benefit from that ENP may be able to provide?
- (Open text field)

B. Primary Research Framework

Category	Theme	Sub-Theme	Sampling of Supporting Comments	
IMPACT OF ENP	Significance of Impact	Grant Recipients	<ul style="list-style-type: none"> • More selected: <ul style="list-style-type: none"> ○ Fundamental impact resulting in significant organizational change ○ Substantial impact supporting or improving existing processes / programs. ○ Significant impact in terms of organizational knowledge and planning 	
		Other Respondents	<ul style="list-style-type: none"> • More Selected: <ul style="list-style-type: none"> ○ Some impact on small aspects of the organization ○ Little impact ○ Does not apply • However many indicated workshops and training as very impactful 	
	Organizational & Leadership Development	Entrepreneurial Focus		<ul style="list-style-type: none"> • At the staff level created entrepreneurial spirit • Made them more entrepreneurial • Not only launched original plan but also supporting project as a result • Reaffirmed and solidified entrepreneurial spirit
				<ul style="list-style-type: none"> • Great – not something they could have done with their group – limited – over-volunteered – to have someone just do it and pull it all together to look at discuss. • Received business planning grant – took a year- big learning process – looked at it as an opportunity to build capacity in own org – when it comes to doing this kind of business development – did it in-house – ENP was willing to work with them on this – business coach came over a number of times – contracted her to do the financial planning and for ED to use the values-based budget planning – since then have used it on an ongoing basis – really helped. • Funding used for investigative purposes – feasibility study, Internally done, Successful helpful, Didn’t result in new initiative. Too much overlap with what doing in current businesses - Don’t want to be competitors with stakeholders. • They were fumbling in that direction and they offered the framework for them to define and enhance what they were doing Realized that was the direction they were headed in anyways, helped them grab on to the framework and explain what they were doing.
		Organizational Capacity / Knowledge		<ul style="list-style-type: none"> • Work with real business experts really eye opening and encouraged a mindset in the senior staff has evolved from purely charitable to realizing they have to stay open and have a biz mind or they can’t do ultimate charitable goal. Learned what has a dollar figure • Business plan – finished – but haven’t launched it yet -got lots of information on how to do it, and what would be necessary. • Provided knowledge of that sector that they needed to learn more about and see if they could access / launch it. • wouldn't be where they are now without ENP • ENP was source of firming up plans and doing more work on what it might look like for them • Learned new skill set – how to approach our enterprise from business perspective rather than non-profit. It was an amalgamation of the two. • Added quite a bit of level of professionalism to primary staff in office
		Key Training & Toolkits		<ul style="list-style-type: none"> • Workshop – was a lightbulb and aha moment “this is what I’m trying to do!” left with tons more questions of the business operations side of things.

Category	Theme	Sub-Theme	Sampling of Supporting Comments	
			<ul style="list-style-type: none"> • Workshop was hugely valuable b/c they didn't have any reference to where they sat and whether or not what they were doing aligned with best practices in the broader industry, etc. • ENP presented workshop with CRA to help explain what was or wasn't in core activities so orgs know which they could do and still be in alignment with legalities • Used resources from website in org planning • Lots of really good stuff on there – really helpful through the business planning process. • Created a knowledge base within key staff + knowledge, info & education for staff 	
		Objectivity & Authority	<ul style="list-style-type: none"> • Really great having expert level consultant • Helped with presenting information to Board and executive staff • So great to have that objectivity and level of professional advice • Consultant has no tie to idea – so looks at it from unbiased perspective • Decided not to launch program because proven wouldn't make money – really grateful they didn't waste valuable time and money • Results from feasibility study indicated idea was not viable. Helped to have this knowledge. • Provided knowledge in a sector they were unfamiliar with. 	
		Money & Resources	<ul style="list-style-type: none"> • Don't have the money to hire someone of that capacity. • Don't have time to do this thorough review. • Wouldn't have been able to conduct this without ENP. 	
		Community Engagement	Connections & Credibility	<ul style="list-style-type: none"> • Brought in other entrepreneurs in the community (very professional and aggressive entrepreneurs) – exciting to connect with other groups in the area • Within the community it has helped them be seen as a more legitimate enterprise as a result – building a reputation
			Knowledge Exchange	<ul style="list-style-type: none"> • Workshops -the way it was run (the possibility for little groups to meet and exchange ideas – whole atmosphere was really good • Biggest inspiration was learning the diversity of the ENP programs • What came out of it were best practices for other orgs – even though they're not really connected don't have capacity to research other orgs in larger world, but having ENP share the access and exposure to this.
			Revenue & Program Development	Diversified Funding & Initiatives
	Increased Revenues	<ul style="list-style-type: none"> • Increased since then – (15-20%) ENP has directly attributed to this, faster growth and more strategically than it would otherwise have been • Half of the growth they've seen they would directly attribute to ENP • Improved income of existing business 		

Category	Theme	Sub-Theme	Topic	Sampling of Supporting Comments	
CHALLENGES	Long-term Stability & Sustainability	Strategic Business Planning	Business Knowledge	<ul style="list-style-type: none"> Background in Arts and Sustainability – schooling did not help with the business writing or fulfillment skills – saw it as an opportunity to learn more concrete practices. Need more help from ENP or those who can address the needs, advice or mentorship Afraid of getting too successful as need help in marketing, database, etc. and becoming a non-profit. Initial funding for business plan helped, but now they need more mentoring/consulting - stuck at next level Strategic planning – planning longer-term – can’t afford mistakes. 	
			Time & Money	<ul style="list-style-type: none"> Limited time – over-volunteered Don’t have funds to hire new consultant to help with latest project Hard to keep strategic planning in focus. With only 4 on the board (all employed F/T hard to keep going) For small non-profit it’s really hard to find funding for strategic planning - funding is usually for programs If they had the time they could do it. But don’t have the time, and has been extremely helpful to compile all that data and writing it into the report. It’s great to bring in someone who can just focus on it – other staff just don’t have time – without ENP they wouldn’t be able to do this. 	
		Sustainable Funding	Operational Funds	<ul style="list-style-type: none"> Funding being tied to time to work on these projects. Securing funding for operations/overhead difficult You can never get funding for or support for is year-round staff. Always have to come up with a special project 	
			Gov’t Funding Cuts	<ul style="list-style-type: none"> Public government fund cuts are necessitating new revenue streams (grants, other) Ways that they can raise more money. Right at the time of government funding cuts. Government spending is cutting back and now they need private sponsorship. However, many other orgs are in similar position so there is lots of competition to get corporate dollars. 	
		Gaps in Capacity & Partnerships	Staffing & Volunteers	Pool of Stakeholders	<ul style="list-style-type: none"> Insufficient volunteer support – membership drives but Directors on board are often left doing all the volunteer work Always a problem to get people who can stay.
				Overtaxed Staff	<ul style="list-style-type: none"> Daily running of programs takes everything out of them. Been there since the beginning – close to burn out. Trying to do it all with limited resources and time. Old cliché - underpaid and overworked.
	Strategic Staffing Plan			<ul style="list-style-type: none"> Growth – getting a proper growth plan in place – consulting work in that area. Getting a proper growth plan with staffing plan in place – grew really fast not sure of all the roles that people play Challenge to Attract and keep the right people. Maintaining strong, long-term staff team Succession plans is difficult to find the right person and come up with a plan that is right for the organization. 	
	Silos		Knowledge Sharing	<ul style="list-style-type: none"> More opportunities to connect with what other orgs have done – learning best practices – lots of knowledge No forum exists for getting together with other non-profits to share ideas 	
		Connections & Partnerships	<ul style="list-style-type: none"> Really hard for individual organizations to get a good understanding of industry best practices when operating in silos due to capacity constraints – linking outside of genre is really difficult and the cross-sectorial connections just don’t exist Would be helpful to be introduced to new partners – new business partners and new ventures 		

Category	Theme	Sub-Theme	Topic	Sampling of Supporting Comments
	<i>Marketing, Sales and Location Barriers</i>	<i>Sales & Marketing</i>	Sales & Marketing Plan	<ul style="list-style-type: none"> • Need a sales and marketing plan. • One main problem is marketing - how to engage the local community. • The marketing budget is way too low, but it's a chicken and egg thing – maybe if put more money into marketing it'd bring in more money from the public, but don't have that money to put in.
			Marketing, sales Knowledge	<ul style="list-style-type: none"> • Don't have a background in marketing. • Don't have the knowledge necessary. • Don't really know what will sell.
		Local Support	<ul style="list-style-type: none"> • Location is hard as not near Vancouver – not accessible to many resources • Was wonderful when there was a local liaison – so helpful – regional access • Difficult to hire the right people in rural area 	
		Business Opportunities	<ul style="list-style-type: none"> • Location and logistics (remote) operating a business - hard to get volunteers • Marketing is such a challenge – not able to sell all the products due to location. 	

Category	Theme	Sub-Theme	Sampling of Supporting Comments
SUGGESTED FUTURE SERVICES	Grants & Workshops	Further Funding Opportunities	<ul style="list-style-type: none"> • Uncertain if eligible for future funding • Need funding for marketing plan • Wish there was funding for ROI or cost-benefit analysis
		New Content	<ul style="list-style-type: none"> • Wouldn't go again unless there was new content • Workshop was great, but only one – now they're at next level • Went back a number of times – always evolving – get something new each time • Only went once, not likely to go again to same
	Longitudinal Support	Ongoing consulting, training	<ul style="list-style-type: none"> • Need more help from ENP or those who can address the needs, advice or mentorship • Initial funding for business plan helped, but now they need more mentoring/consulting - stuck at next level • Afraid of getting too successful as need help in marketing, database, etc. and becoming a non-profit. • Strategic planning – planning longer-term – can't afford mistakes. • Wish they could reach out to same consultant again but out of funds • External consultant was so helpful – but now on their own • Could ENP have in-house consultants so non-profits could reach out if need further advice?
	Regional, Peer Support, Online Resources	Regional offerings, access	<ul style="list-style-type: none"> • Want regional connections • Wish there were offerings for those spread across BC • Location is hard as not near Vancouver – not accessible to many resources • Was wonderful when there was a local liaison – so helpful – regional access • No one to reach out to
		Online easier to navigate	<ul style="list-style-type: none"> • Looked at online resources but didn't use much • Lots of stuff there • Haven't really used online resources – did really use hardcopy toolkit though – very helpful • Don't know where to look for information • Too much content - overwhelming
		Best Practices Forum & Report	<ul style="list-style-type: none"> • Don't really know best practices, would be great if ENP could host annual forum of successful enterprising non-profits and then publish best-practices learned from them for others in some kind of report • Would be good to have more gatherings to learn from one another
		Peer Support	<ul style="list-style-type: none"> • Don't have time or money to build external partnerships • ENP in really great position – so many connections, well-respected – ideally suited to get groups together • ENP could facilitate some kind of way for charities to keep supporting each other • Maybe ENP should host peer support groups, or some way for charities to bounce ideas off of • Hard to have time or people to connect with and brainstorm, maybe ENP could organize this

Addendum

A. OMP Project Proposal

BUSA 696 - THE ORGANIZATIONAL MANAGEMENT PROJECT: PROJECT PROPOSAL

Learner Name: Rebecca Bailey

Intake: 2014-1

Draft _____

Final ___X___

OMP _____

OMP-C ___X___

Project Title

“Exploration of Impact and Outcomes on Past Participants to Inform Value Proposition and Future Opportunities for *Enterprising Non-Profits BC*”

Brief Description of Organization

Enterprising Non-Profits BC (*enp-BC*) began as a pilot project in 1997 aimed at helping 10 non-profits develop social enterprises to become more financially independent. Since then, the project has grown and evolved into a resource body that helps non-profits all across British Columbia, with chapters across the nation. *Enp-BC* provides training, toolkits and grants to non-profits to help them develop or expand revenue-generating activities that promote financial stability.

Enp-BC has four objectives:

- To enhance enterprise skills;
- To ensure access to capital and investment;
- To expand market opportunities, and;
- To build healthy communities. (About *enp-BC* , n.d.)

One of the only resource bodies of its kind in the province, *enp-BC* plays a leading role in inspiring, educating, and fostering BC’s non-profits that are looking to develop financial sustainability. It currently provides grants to approximately 50 organizations per year and hosts over 20 training workshops annually throughout the province. As a result over 500 individuals representing approximately 300 different non-profits from around the province are trained annually. Many of its workshops sell out, and the need continues to grow.

Enp-BC has been a pioneer in British Columbia, helping the charitable sector think outside-the-box to blend business skills-sets with its strength in human services. Looking to the future, *enp-BC* wants to both build on past successes and explore new opportunities to continue to equip and strengthen the charitable sector across the province.

Although a significant provincial resource body, it is a small two-person-run program. It does not currently possess the in-house capacity to conduct a thorough evaluation of outcomes and

opportunities. This impacts its ability to better tell its story, and clearly communicate its value proposition to existing or potential partners. Additionally, lack of capacity limits the opportunities of exploring new methods of supporting non-profits.

Problem Statement

Enp-BC has many non-profits and social enterprises who connect either via seminars, grant applications or other means. Although *enp-BC* has contact details for these organizations, it doesn't currently have the capacity to keep up to date with them. Thus, there is no understanding of where these organizations are at, how their interaction with *enp-BC* impacted them, or how *enp-BC* could help now or in the future. The research question will be: *How has training, resourcing and funding the development of revenue-generating activities effectively impacted non-profits in becoming more financially stable and increasing their capacity to fulfil their mandate?*

Anticipated Long-Term Benefits

This project will research and document the impact *enp-BC* has had on past participants, as well as their current state and challenges or needs. Additionally, this project will review research on non-profit and/or social enterprise revenue streams, funding challenges and the development of revenue-generating initiatives.

Anticipated benefits are three-fold. Firstly, the research from this project will provide *enp-BC* with a more fulsome understanding of the impact it has had on past participants. This will enable *enp-BC* to develop a concrete value proposition and case for support to encourage more organizations and potential funders to get involved. Secondly, it will illuminate which activities or resources have provided the most significant return on investment. This can help to guide future initiatives, focus and funds. Finally, it will provide recommendations based on both primary and secondary research of what identified gaps could be explored to better fulfil its mandate as it continues to grow.

Project Scope

The scope of this project is limited to:

- Reviewing secondary research on non-profit and/or social enterprise revenue streams, funding challenges and the development of revenue-generating initiatives.
- Identifying outcomes of previous interaction with *enp-BC*, as well as current state of past participants who have not been in contact with *enp-BC* for a minimum of three years in the following formats:
 - No more than two surveys sent out across the province;
 - No more than four focus groups, all in the Lower Mainland, with the following representation:
 - Urban, sub-urban, rural;
 - Organizations of different sizes and different mandates;
 - No more than ten individual interviews, either by phone or in person;
- Exploring similarities and differences in the results of both primary and secondary research, including common themes and/or trends;
- Providing *enp-BC* an in-depth overview of the research results;

- Providing recommendations for *enp-BC* on:
 - What results to further explore in order to more clearly articulate its value proposition;
 - What strengths it possesses which may be leveraged to maximize impact;
 - What current gaps exist that may present strategic growth opportunities..

The scope of this project does not include:

- Primary research with organizations who:
 - have been in contact with *enp-BC* in the past three years;
 - are located beyond British Columbia;
- Identification or recommendations of a specific strategy or change management process to leverage *enp-BC*'s strengths, exploit current gaps, or mimic industry best-practices.

Research Approach and Methodology

The research for this project will include both secondary and primary research related to both best-practices and the outcomes of *enp-BC* past participants. A literature review will be conducted on industry best-practices or theoretical proposals, as this is still a relatively emergent field. Internal records of *enp-BC* will be reviewed for past initiatives and participant feedback. Finally, primary research in the form of surveys, focus groups and interviews will be conducted with past participants to assess impact and the current state of these organizations.

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Draft Survey Questions

The following is a proposed draft for survey questions to be distributed.

18. Where is your organization located:

- Lower Mainland / Metro Vancouver
 - Vancouver Island
 - Fraser Valley
 - Interior
 - North
19. What is the current status of your organization?
- Active
 - Inactive
20. What is the annual income of your organization?
- Under \$100,000
 - \$100,000 - \$499,999
 - \$500,000 - \$999,999
 - \$1,000,000 - \$2,999,999
 - \$3,000,000 - \$4,999,999
 - \$5,000,000+
21. Approximately what percentage of your organization's income is **currently** from a revenue-generating activity (rather than donations, grants, or interest on investments)?
- None
 - Under 10%
 - 11-19%
 - 20-30%
 - 31-40%
 - 41-50%
 - 51%+
22. Before you were connected with ENP, approximately what percentage of your organization's income was from a revenue-generating activity (rather than donations, grants, or interest on investments)?
- None
 - Under 10%
 - 10-19%
 - 20-30%
 - 31-40%
 - 41-50%
 - 51%+
23. How many staff does your organization currently employ?
- Under 5
 - 5-9
 - 10-19
 - 20-39
 - 40-59
 - 60+
24. What kind of connection has your organization had with ENP in the past?
- Select all that apply:
 - Attended workshop
 - Applied for grant
 - Grant recipient

- Downloaded resources from website
 - Mailing list only
25. What prompted this connection?
- Select all that apply:
 - Wanted to learn more about developing revenue streams
 - Recommended by colleague, friend, acquaintance, etc.
 - Wanted to apply for funding
 - Wanted to utilize website resources to assist in conducting feasibility study, action plan or similar
 - Personal connection
 - Other: (Please specify)
26. What, if any, impact did connecting with ENP have on your organization?
- Select all that apply:
 - Provided important training and information (via workshops)
 - Provided funding
 - Provided toolkit that was used in organizational planning
 - Provided foundation of learning that was applied to the development of a new revenue stream
 - Provided contacts / networking
 - Other (please specify)
27. Overall, how significant of an impact has ENP had on your organization?
- Fundamental impact resulting in significant organizational change
 - Substantial impact supporting or improving existing processes / programs.
 - Significant impact in terms of organizational knowledge and planning
 - Some impact on small aspects of the organization
 - Little impact
 - Does not apply
28. What are some of your organization's biggest current challenges?
- Select all that apply:
 - Sustainable funding streams
 - Strategic planning
 - Strong, long-term staff team
 - Shifting mission / vision or targeted clientele
 - Sufficient volunteer support
 - Other (please specify)
29. How would these your organization like to be connected to ENP in the future?
- Select all that apply:
 - Attend future workshop
 - Apply for future funding
 - Access online resources
 - Continue to receive email newsletter
 - Other (please specify)
 - Does not apply
30. What other resources would your organization benefit from?
- (Open text field)

Draft Focus Group Questions

In focus groups, questions 1-7 from above will be distributed in paper form at the start, and participants will be asked to fill out these and hand them in prior to leaving. Then, questions 8-13 will be discussed as a group.


Draft Interview Questions

Financial and time restraints will prohibit travelling to areas outside of the Lower Mainland to run focus groups with organizations from across the province. In order to ensure that there is representation from outside of the Lower Mainland, interviews will also be conducted via phone or video conferencing with organizations across the province. In interviews, questions 1-7 from above will be emailed in advance to the interview and participants will be asked to fill out these return via email prior to the interview. During the interview, questions 8-13 will be discussed over the phone or in person.

Project Schedule and Milestone Dates/Project Deliverables

ACTIVITIES	DATES	APPROX. TIME ALLOCATION (hrs)
1. Project Exploration	Oct 3-17	5
2. Proposal Development	Oct 17 – Nov 7	10
3. Proposal Submission to RRU	Nov 18	n/a
4. Research Methodology Development	Nov 8 – Dec 1	10
5. First Review with ENP	Nov 31, 2014	2.5
6. Research Methodology Submission to RRU	December 7	n/a
7. Secondary Research Process <ul style="list-style-type: none"> • Internal ENP docs / records • Academic papers • Industry journals / publications • Best practices, existing models 	Nov 8 – Jan 23	40
8. Ethical Review Submission to RRU	Jan 25, 2015	n/a
9. Second Review with ENP	Jan 30, 2015	2.5
10. Preparation for Primary Research	Jan 24 – Feb 15	15
11. Ethical Review Approval	Feb 15, 2015	n/a
12. Primary Research Process	Total = Jan 24 – Mar 18	Total = 30
<ul style="list-style-type: none"> • Phase 1: Questionnaire (survey) 	• Feb 16 – 27	10
<ul style="list-style-type: none"> • Phase 2: Subject Matter Experts Interviews 	• Feb 20 – Mar 6	10
<ul style="list-style-type: none"> • Phase 3: Focus Groups 	• Mar 7 – 18	10
13. Third Review with ENP	Mar 13, 2015	2.5
14. Analysis of Research	Mar 19 – 29	25

15. Building of Recommendations	Mar 30 – Apr 10	20
16. Compilation of Report & PPT	Mar 30 – Apr 26	25
17. Presentation to ENP: Findings & Recommendations	Week of Apr 20	2.5
18. Submission of OMP-C to RRU	Apr 26, 2015	n/a
	TOTAL	190

Signed 

 Learner (for OMP-C only)

Signed 

 Client (for OMP-C only)

References

About enp-BC . (n.d.). Retrieved October 31, 2014, from Enterprising Non-Profits:
<http://www.socialenterpriseCanada.ca/en/communities/bc/nav/enpbc.html>

B. OMP-C Time Log

Date	Hours	Activity	Date	Hours	Activity
21-Sep-14	1	Statement of Project Intent	09-Mar-15	0.5	Conducting phone interview 5
10-Oct-14	2	Draft Project Description	10-Mar-15	0.5	Conducting phone interview 6
17-Oct-14	2	Meeting with ENP	13-Mar-15	0.5	Conducting phone interview 7
31-Oct-14	4	Draft Proposal	13-Mar-15	0.5	Conducting phone interview 8
11-Nov-14	3	Draft Proposal	13-Mar-15	0.5	Conducting phone interview 9
18-Nov-14	1	Final Proposal	13-Mar-15	0.5	Conducting phone interview 10
18-Nov-14	1	Second meeting with ENP	13-Mar-15	0.5	Conducting phone interview 11
23-Nov-14	2	Draft Research Methodology	13-Mar-15	0.5	Conducting phone interview 12
25-Nov-14	2	Draft Research Methodology	13-Mar-15	0.5	Conducting phone interview 13
28-Nov-14	1	Final Research Methodology	16-Mar-15	0.5	Conducting phone interview 14
12-Dec-14	4	Secondary Research (Dispersed)	20-Mar-15	0.5	Conducting phone interview 15
19-Dec-14	5	Secondary Research (Dispersed)	20-Mar-15	2	Development of secondary research framework
20-Dec-14	3	Secondary Research (Dispersed)	20-Mar-15	6	Populating of secondary research into framework
03-Jan-15	1	Secondary Research (Dispersed)	20-Mar-15	1	Exporting survey results
04-Jan-15	1	Secondary Research (Dispersed)	20-Mar-15	2	Preparing, sorting, organizing survey results
09-Jan-15	6	Preparation/edit of Survey	21-Mar-15	5	Preparing, sorting, organizing survey results
10-Jan-15	3	Preparation of contact list	27-Mar-15	3	Preparing, sorting, organizing survey results
14-Jan-15	1	Distribution of survey	27-Mar-15	4	Typing, organizing and reviewing interview notes
16-Jan-15	2	Revision of survey to collect email addresses for draw	28-Mar-15	2	Reviewing focus group recording and notes
19-Jan-15	2	Secondary Research (Dispersed)	29-Mar-15	5	Analyzing survey results
23-Jan-15	3	Preparation of Focus Groups (web invite, sourcing and booking locations)	03-Apr-15	3	Populating focus group / interviews info into primary research matrix
24-Jan-15	1	Revision of Focus Groups	03-Apr-15	5	Analysis of framework
30-Jan-15	5	Review of survey results & email responses	04-Apr-15	5	Building common themes in survey / focus groups / interviews
31-Jan-15	5	Client Communication (dispersed)	04-Apr-15	2	Brainstorming recommendations
31-Jan-15	3	Secondary Research (Dispersed)	04-Apr-15	1	Outlining report
31-Jan-15	1	Invitation to Focus Groups	06-Apr-15	1.5	Secondary Research (Dispersed)
06-Feb-15	2	Segmentation of client list for invites	06-Apr-15	1	Bullet point in outline
06-Feb-15	2	Calling client list (Round 1)	07-Apr-15	1	Secondary Research (Dispersed)
06-Feb-15	2	Calling client list (Round 2)	10-Apr-15	5	Writing Report
06-Feb-15	2	Calling client list (Round 3)	10-Apr-15	3	Secondary Research (Dispersed)
07-Feb-15	0.5	Follow up emails after calls (Round 1)	11-Apr-15	4	Writing Report

07-Feb-15	0.5	Follow up emails after calls (Round 2)		13-Apr-15	1	Secondary Research (Dispersed)
07-Feb-15	0.5	Follow up emails after calls (Round 3)		13-Apr-15	2.5	Writing Report
20-Feb-15	5	Conducting focus group (including set up, calling clients, getting refreshments, etc.)		14-Apr-15	2	Secondary Research (Dispersed)
20-Feb-15	2	Emailing client list for interviews (round 1)		14-Apr-15	1	Writing Report
20-Feb-15	2	Emailing client list for interviews (round 2)		15-Apr-15	0.5	Secondary Research (Dispersed)
21-Feb-15	2	Emailing client list for interviews (round 3)		15-Apr-15	1	Writing Report
21-Feb-15	3	Secondary Research (Dispersed)		16-Apr-15	3	Secondary Research (Dispersed)
23-Feb-15	0.25	Conducting informal interview 1		17-Apr-15	2	Secondary Research (Dispersed)
06-Mar-15	0.5	Conducting informal interview 2		17-Apr-15	5	Writing Report
06-Mar-15	0.5	Conducting phone interview 1		18-Apr-15	6	Writing Report
06-Mar-15	0.5	Conducting phone interview 2		19-Apr-15	8	Editing report
06-Mar-15	0.5	Conducting phone interview 3		20-Apr-15	3	Editing report
06-Mar-15	0.5	Conducting phone interview 4		21-Apr-15	2	Editing report
06-Mar-15	4	Secondary Research (Dispersed)		8-May-15	6	Prepare PPT for ENP
07-Mar-15	3	Secondary Research (Dispersed)		15-May-15	1	Final presentation to ENP
				TOTAL	209.25	

C. Client PowerPoint

**IMPACT & OUTCOMES
REPORT – ENP BC**
Rebecca Bailey - RRU

np-bc
ENP RESEARCH REPORT – RRU 2015

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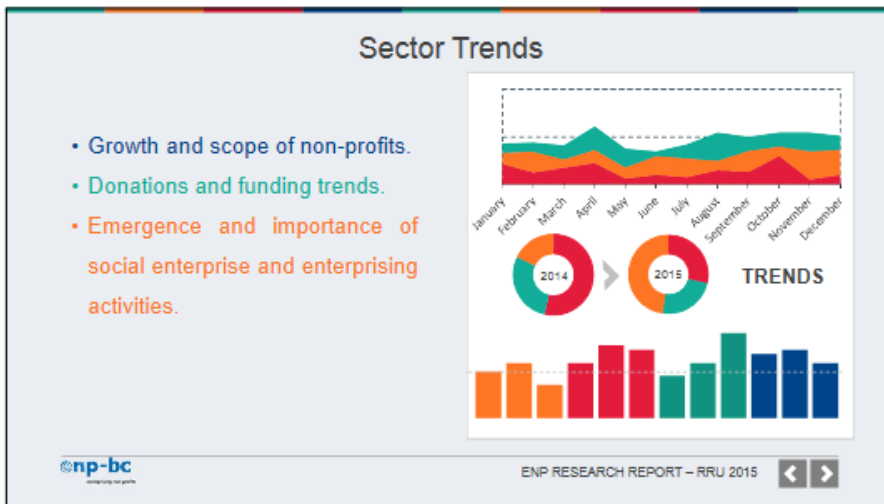
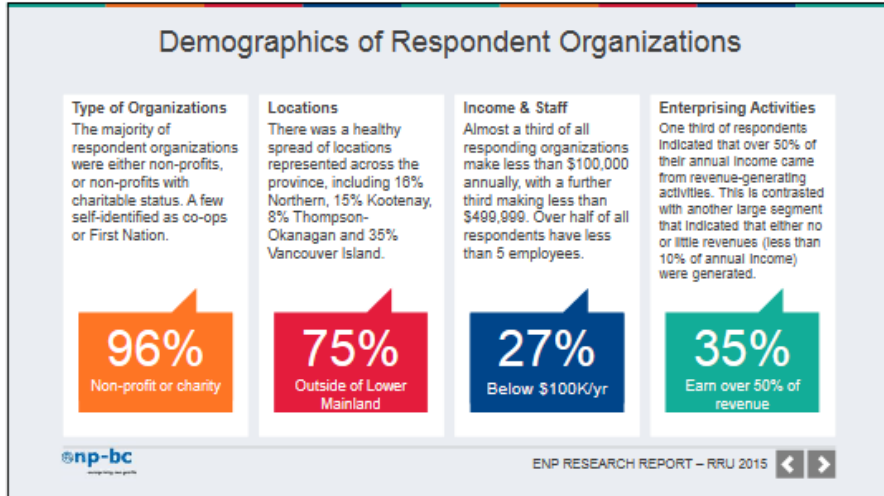
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- **SECONDARY RESEARCH**
- **PRIMARY RESEARCH**
- **ANALYSIS**
- **RECOMMENDATIONS**
- **IMPLEMENTATION**

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OVERVIEW

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Sector Challenges



- 1** Long-term Stability & Sustainability
- 2** Gaps in Capacity & Partnerships
- 3** Marketing, Sales & Locational Barriers

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Impact of Capacity Building Initiatives



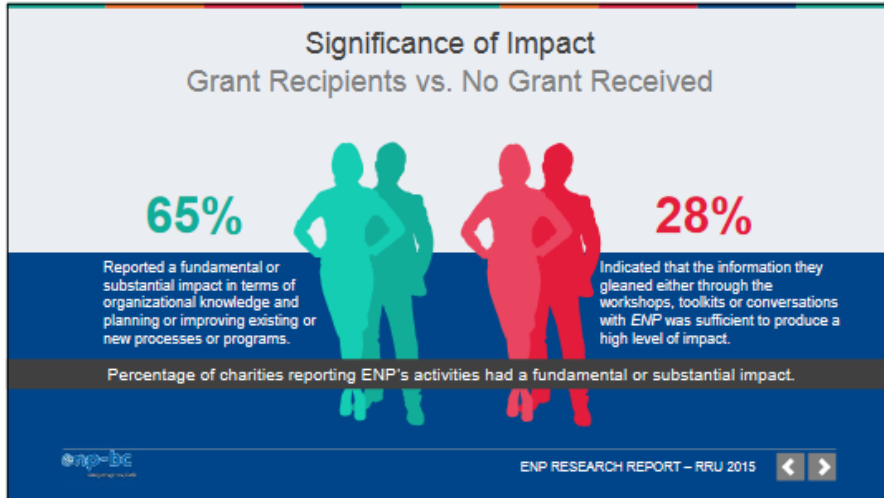
- Organizational & Leadership Development
- Revenue & Program Development
- Community Engagement

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PRIMARY RESEARCH RESULTS

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Client-Proposed Services

- Grants & Workshops
- Longitudinal Support
- Regional Offerings
- Peer Support
- Online Resources

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ANALYSIS

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Informing ENP's Value Proposition

- ENP's Reputation & Capacity
- Capturing & Leveraging Outcomes Data
- Communications & Stakeholder Engagement

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Longitudinal, Accessible and Networked Support

- Longitudinal support and clearly presented offerings.
- Accessibility of offerings.
- Peer-to-peer learning opportunities.

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RECOMMENDATIONS

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Recommendations

1. Leverage Reputation & Partnerships	4. Integrate & Repackage Offerings
2. Outcomes Collection & Reporting Plan	5. Update & Redesign Website via Telus
3. Communication & Engagement Plan	6. Create Facilitated Online Courses

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4. Integrate & Repackage Offerings

The Four Stages of Enterprising Non-Profits

- Learn about social enterprise
- Plan your social enterprise
- Manage your social enterprise
- Grow** your social enterprise

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IMPLEMENTATION




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ASSUMPTIONS


- COSTS
- TIMELINES
- PHASES

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Phased Implementation



-  **Phase 1: Data and Communications Revamp**
-  **Phase 2: Repackaging and Redesign**
-  **Phase 3: Piloting Online Courses**

 ENP RESEARCH REPORT – RRU 2015 



Fin.

QUESTIONS?

 ENP RESEARCH REPORT – RRU 2015 

D. Client Sign off

FOR OMP-c PROJECTS ONLY

OMP CONSULTING PROJECT AGREEMENT

Agreement and approval of this Project requires the signature of the individuals and/or representatives involved in the project. By signing below, the following individuals and/or representatives understand the objectives and details of the Project, have read the OMP Proposal, and agree that this Project delivered what was agreed upon in the Proposal. This does NOT necessarily imply agreement with the Recommendations contained herein.

MBA Consultant: _____ *[Signature]* _____ *May. 15/15*
 Learner to sign above Date

Client: _____ *Kim Bulea* _____ *May 15/15*
 Client to sign above Date

Client: _____ *Kim Buksa* _____ *604.871.5421*
 Client Name Client Phone # or e-mail

For Royal Roads University: _____ *Don H. Caplan, Academic Projects Manager* _____
 Date