Reflections on Rural Social Enterprise in Ontario: RSEC Learning Report

March 2016

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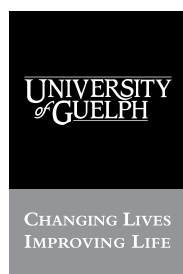With Paul Chamberlain, Heather Laird, and Jennifer Mitchell

Collaborating Partners

C. Lang CONSULTING

eko nomos

The Canadian CED Network
Le Réseau canadien de DÉC

ONTARIO NONPROFIT NETWORK

CCRC centre canadien pour le renouveau communautaire
Renforcer La Résilience - Transformer les Économies Locales

COIN
Community Opportunity
Innovation Network

UNIVERSITY of GUELPH
CHANGING LIVES IMPROVING LIFE

United Way Centraide
Greater Simcoe County
Grand Comté de Simcoe

HBDC

PARO Centre
For Women's Enterprise

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Forward

Social Enterprise

The practice of social enterprise (SE) is well established in the nonprofit sector. Organizations and communities have been engaging in social enterprise for decades. Many nonprofits across Ontario have created their own revenue streams, with an average of 45% of nonprofits' revenues coming from earned income[1]. SE is a strategy to help create resilient, innovative nonprofit organizations and sustain services to build healthy communities.

The Rural Social Enterprise Collaborative

The Rural Social Enterprise Collaborative (RSEC) is a provincial collaboration working to support nonprofit SE in rural communities as an active working group of the Ontario Nonprofit Network (ONN) since 2012. It's an evolving group of nonprofit organizations and individuals in regions across the province. This report speaks to lessons from RSEC's central project over the last three years.

A leadership team has been at the heart of the RSEC. It included provincial partners and regional organizations that work in four rural and northern regions, listed here in alphabetical order:

- Canadian Community Economic Development Network (CCEDNet)
- C. Lang Consulting
- Eko Nomos
- Huron Business Development Corporation/United Way Perth Huron
- Ontario Nonprofit Network
- Community Opportunity and Innovation Network, Inc.
- PARO Centre for Women's Enterprise
- United Way of Greater Simcoe County/ Georgian College Centre for Social Entrepreneurship
- Centre canadien pour le renouveau communautaire - Canadian Centre for Community Renewal
- University of Guelph

> **What is nonprofit social enterprise?**
>
> **A business operated by a nonprofit that is directly involved in the production and/or selling of goods and services to customers for the dual purpose of generating income from sales and achieving social, cultural or environmental aims.**
>
> ENP BC 2011

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1 The Nonprofit & Voluntary Sector in Ontario- Regional Highlights of the National Survey of NonProfit and Voluntary Organizations (2006) p. 16] http://www.imaginecanada.ca/sites/default/files/www/en/nsnvo/d_ontario_sector_report.pdf]

RSEC Projects

RSEC began work by successfully applying to the Ontario Trillium Foundation for the funding of two sister projects. Its initial two projects built on important work developed over a number of years by RSEC partners and many other rural champions, including provincial rural organizations, social enterprises, United Ways, community economic development organizations, Community Futures Development Corporations, municipalities, and organizations in the co-operative sector.

The primary project, a three-year initiative hosted by the Ontario Nonprofit Network, has been focused on developing an ecosystem approach to rural social enterprise in Ontario. Activities included regional social enterprise capacity building, networking, and enhancement of social enterprise practice in rural Ontario in order to document and develop the systems of support needed for the long-term vitality and sustainability of the sector. The second project, administered by CCEDNet Ontario, integrated a rural component into an initiative concentrated on creating networks and strategic linkages regionally and across rural and urban SE's in the province to advance SE sector development. This project was known as LIAISOn. The Ontario Trillium Foundation funded the two projects from 2012 to 2015.

Purpose of this Report

The report that follows outlines the rationale and theory of change that have informed RSEC's work. It shares project accomplishments, key learning, and the voices of rural stakeholders who were involved in RSEC project activities from 2012 to 2015. Finally, the report documents insights for action: ways to continue building the capacity of rural and northern nonprofits to strategically engage in social enterprise and provide leadership in the larger SE sector.

1. Introduction

Why Rural Social Enterprise?

Rural and northern nonprofits play an important role in their communities - a role that is far too often overlooked. They contribute to quality of life in their communities by doing work in diverse sectors including arts, culture and heritage, social services, environment, sports and recreation, and agriculture. They steward community social, cultural, and natural assets. While it is commonly understood that nonprofits provide services and opportunities for community engagement and voluntarism, it is not as widely recognized that they provide much-needed jobs and are thus an important aspect of the economy. This is particularly true in rural and northern regions. In these different ways, nonprofits contribute to healthy communities and local economic development.

Social enterprises are earned revenue strategies that assist nonprofits in becoming more resilient and more able to sustain and grow their positive impacts in communities. Social enterprise can be a unique way to generate unrestricted revenue and use organizational assets flexibly; to ensure that important community assets are sustained; and/or to deliver innovative programming including training and employment for those who cannot easily find or retain employment.

Other projects with rural stakeholders confirm that, while rural nonprofits and communities are innovating in developing earned revenue strategies, they also face unique challenges that differ from their urban counterparts. A project hosted by the Foundation for Rural Living with collaborators C. Lang Consulting and Eko Nomos resulted in "Rural Social Enterprise Project: Documenting the Learning," a paper that outlines some of these rural challenges and innovations.[2] This project led to the solutions that were tested in the RSEC sister projects.

Rural and northern nonprofits remain at a disadvantage to their urban counterparts. This may be experienced as gaps in access to grant capital, capacity building resources, specialized supports tailored to their needs, and social enterprise networking and mentoring opportunities to assist them with their social enterprise development. Further, the ability of rural and northern nonprofits to contribute knowledge about effective SE practice and policy is often limited by their smaller scale, less established connections to influencers (often urban-based organizations and people), and the lack of a unified position on common issues.

RSEC was initially driven by SE sector builders and rural champions who were interested in how rural SE could be more systematically supported through policy and other institutional changes. They were also interested in how the larger field of SE could better integrate the perspective and influence of rural and northern nonprofits for the benefit of all. ONN and CCEDNet Ontario responded to the challenge by working collaboratively with these champions, providing RSEC projects with an administrative backbone and joint leadership for the next phase of collective work. Funding from the Ontario Trillium Foundation enabled the launch of the first formal efforts of the group: two three-year field-building projects focused on regional SE systems development and sector linkages.

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2 https://ccednet-rcdec.ca/en/toolbox/rural-social-enterprise-project-documenting-learning

Through collaboration and multi-pronged strategies, RSEC implemented an ecosystem approach to supporting rural social enterprise. This meant bringing a rural lens to the work of provincial intermediaries, providing capacity building supports to rural and northern nonprofits and social entrepreneurs, linking them to the larger sector, and mentoring regional intermediary organizations that are now taking on this place-based work and moving it forward.

2. RSEC's Core Assumptions

Change Model

RSEC based its strategies on a set of fundamental assumptions. These are that:

- social enterprise can play an important role in building stronger and more resilient rural and northern nonprofits and communities

- rural and northern nonprofits could use more assistance in strategically integrating social enterprise in their work

- nonprofits can be more resilient and sustainable and are better able to build strong communities when they have access to an earned revenue stream

- for rural and northern nonprofits specifically, having successful earned revenue streams can mean the difference between staying afloat and closing their doors

- focusing on individual capacity building alone is not sustainable; an ecosystem approach that involves individuals, organizations, and regional groups, and provincial-level strategy is needed

- regional organizations with experience working in social enterprise, strong convening skills, and local credibility can play an important role as intermediaries, linking nonprofits in their regions to the resources they need

- as more knowledge and stories about innovative rural and northern social enterprise are developed and shared, interest and investment in rural nonprofits and their social enterprise work will increase

- as rural regional and provincial stakeholders grow their understanding of the unique needs of rural and northern nonprofits and work to co-ordinate existing resources, more nonprofit social enterprises will be launched, grown to scale, and remain productive over the long term

SE intermediaries were at the core of RSEC's work. These are local, regional or provincial organizations or networks that connect people, ideas, and resources and create the conditions for successful social enterprise development.

A more detailed graphic depicting the RSEC change model is shown on page 24.

Strategies and Activities

These fundamental assumptions were translated into a set of core strategies, objectives and activities for RSEC's projects, as outlined in the table below. At each project stage, stakeholders were consulted to test assumptions, refine action plans, document impacts, and evaluate work in progress.

Deepening capacity building work & testing new approaches to <u>building skills and supports</u> for rural SE development		
SE Webinars		Coaching for NFP's & Social Entrepreneurs

▼

<u>Building relationships & partnerships</u> among rural SE capacity builders to support long term development		
Assessment of SE Support Capacity in Regions	Regional Intermediaries Mentoring & Convening	Regional Meet Ups & Mapping

▼

Supporting and engaging emerging practitioners & post-secondary institutions in rural SE capacity building & <u>research</u>	
Testing Postsecondary Models	Promoting Research into Rural & Northern SE

▼

Improved SE <u>Infrastructure and Strategy</u> in rural regions of Ontario	
Roundtables in participating regions	Organizations reflect a networked understanding & inter-regional provincial framework for SE & the social economy

▼

Increased understanding and <u>sharing information</u> about the SE sector in Ontario	
SE Mapping Survey completed in 2012 and 2015	SEontario website

Outcomes and Building Blocks

RSEC project outcomes have exceeded expectations. Several important building blocks contributed to the project's success, including:

A solid plan and project management with a knowledgeable experienced team

▼

Three year funding through Ontario Trillium Foundation

▼

Strong collaborative relationships & processes among project partners

▼

Credible, active & engaged regional & provincial partners

▼

Research agenda & reflective practice

The outcomes map on page 35 shows the many changes that resulted from RSEC project activities. These were documented through participant and partner surveys, interviews, and reflection discussions with the leadership team and other stakeholders. It also maps the progressive pathways the outcomes have charted towards more resilient rural and northern nonprofits and communities.

Each of the following report sections includes notes on what we learned and insights for action. The final section closes with notes for future work. For those interested in the details, appendix A "What we Did" includes more information on project outputs and evaluative data including participant comment.

CED Guiding Principles

- **Use of locally produced goods and services**
- **Production of goods and services for local use**
- **Local re-investment of profits**
- **Long-term employment of local residents**
- **Local skill development**
- **Local decision-making**
- **Public health**
- **Physical environment**
- **Neighbourhood stability**
- **Human dignity**
- **Support for other CED initiatives**

Adopted by CCEDNet from Neechi Foods Worker Co-op

Introduction

The strong collaborative relationships built into and through RSEC have been key contributors to the success of the projects.

RSEC is a unique collaboration of regional rural partners, independent consultants, and provincial intermediaries. These partners share a common commitment to local, regional, and provincial fields of SE practice that includes community economic development (CED) principles (see box on this page), rural development approaches, and recognition of the importance of the nonprofit sector as integral to the vision and values of their work.

Pre-existing relationships among many of the RSEC partners made it possible to arrive at a shared vision and plan for the multiple interventions embedded in this phase of RSEC's work. Its outlook and outcomes would be very different with different partners. The unique combination of an experienced and well-networked consulting team, a network of intermediaries in four Ontario regions, and links to Francophone communities contributed to the success of RSEC's work. Convening work in the SE sector in Ontario is customarily focused on distinct groups, such as individual enterprises or nonprofits, provincial intermediaries, or SE investors. It is rare for multiple stakeholders to be invited to the same table for collective action and mutual learning. This was the case in RSEC's projects.

The RSEC approach to flexible, networked leadership was a benefit to these projects. It facilitated resource sharing, strategy development, significant learning, new projects in the initial RSEC regions, new rural-focused academic research, and the interest and engagement of additional regional intermediaries, with key organizations in at least three new regions, including Chatham-Kent, Durham, and Niagara. The relationships forged in these projects prompted further strategic SE work.

For example, when the province of Ontario's Social Enterprise Demonstration Fund (SEDF) issued its first request for proposals, RSEC began work on a collaborative proposal with committed partners in five regions. Northern Ontario developed a separate application built on planning work with RSEC

consultants and members of the Social Enterprise Network of Northern Ontario (SENO). The five regions involved in the RSEC proposal were able to leverage $429,500 to match SEDF funds in their application – a signal for future investment. Subsequent applications and investment plans have been created as a result, with one successful application completed at the time of writing.

As well, connections among regional and provincial partners have led to multiple collaborations beyond the project. These include a rural emphasis for the CCEDNet-Ontario provincial SE survey; the exploration of a rural nonprofit network in Peterborough and area, supported by the ONN; and more.

What we learned

1. **Partners gained from their involvement.** Each partner benefited from involvement in RSEC and continues to play a key role in provincial rural work. Provincial intermediaries began integrating a rural lens into their work. This would likely not have happened without a rural-focused project. RSEC helped to strengthen ONN's understanding of rural contexts and its ability to integrate rural perspectives into a number of files. The projects also presented opportunities for more intentional discussion on and direct connections to SE work on the ground to assist in ONN's role in supporting rural and northern nonprofits. CCEDNet provided critical links between rural, urban, and provincial organizations involved in SE, bringing a CED lens to the work. CCEDNet has been active in sharing the social enterprise survey research, developing the SEontario.org web site with ONN and Pillar Nonprofit Network, and conducting SE focused webinars. CCEDNet has now released the results of a second Ontario-wide social enterprise mapping research project. Collaborating with the University of Guelph and Georgian College, RSEC partners have become more aware of, and linked to, the role of post-secondary institutions in providing and researching SE supports and activities.

2. **Intermediaries are challenged too.** Intermediaries reflect many of the same challenges as the nonprofits coached through RSEC. These include sustainability issues, shifts in staffing and funding, changing organizational priorities, and evolving priorities of key funders. RSEC regional partners were not able to take a central role in leading cross-regional discussion and development during the projects. Out of necessity, regional partners were focused on sustaining their own work. Yet, they have expressed an interest in working and sharing across regions if and when those conversations are convened by trusted parties and financially supported.

3. **Working with Francophone communities requires sufficient resources.** The budget for RSEC work with Francophone communities was insufficient for the projects to have a significant impact within these communities. During the project timeframe, however, the Conseil de la coopération de l'Ontario (CCO) revised its mission to include work not only with co-operatives but also with social enterprises. It has since been addressing the needs for SE capacity building in rural and urban Francophone communities throughout Ontario.

What they said

"I am always amazed at the superlative long-reaching, high-impact outcomes that come from collaborative work, such as this project, and how it builds on our collective and individual work. So, I see all the various opportunities for collaborating as extremely important." *Partner*

"Rural is more on the map in SE sector as other RSEC and SEDF partners are beginning to carry the torch." *Partner*

"We will be developing a sustainable program to support and fund social enterprise across Northern Ontario." *Partner*

Insights for action

- **Make connections central to SE field building.** Effective connections between provincial and regional intermediaries are central to building a strong social enterprise field in Ontario, and to the acceleration of SE development. Collaboration requires time and resources. For the SE sector to move forward, investment is needed to support sector developers and intermediaries to convene and foster collaborative approaches.

- **Facilitating connection among regional intermediaries.** There is still a lot to learn about the most effective ways of facilitating the impactful, active networking of rural intermediary organizations so that they can maximize SE development within their networks and help local peers and champions to learn and grow.

- **Recognize the costs of engagement and outreach with Francophone communities and recognize the nuances of Ontario's linguistic landscape.** Francophone and Anglophone SE intermediaries need to work together to determine the most effective ways of collaborating for the long term on SE capacity building and sector building. With 23 designated areas in Ontario where Francophones have the legal right to receive services in French, funders of SE initiatives should work together with organizations on the ground to develop meaningful connections, where possible with additional funding.

- **There is need and opportunity to extend RSEC's work.** Given the interest of RSEC's regional partners as well as the identification of new rural regional intermediaries that were not actively involved early in the first RSEC projects, there are opportunities to adapt and extend RSEC's intermediary-based collaborative approach and strategic work.

3. Regional Networking and SE Mapping

Introduction

Building strong regional networks and co-ordinating SE stakeholders in rural regions and the north are important building blocks for the development of a strong SE sector in Ontario.

Contributing to this outcome, regional RSEC partners were supported to host "Meet Ups," full-day networking events, in their communities. They aimed to bring together nonprofits interested in SE, showcase SEs operating in the regions, and map undocumented social enterprises. The Meet Ups were also opportunities for regional networking among local nonprofits SE's, funders, and other stakeholders.

Meet Ups in Peterborough and Thunder Bay were successfully integrated with ONN regional meetings. This gave ONN a chance to reach out to more rural and northern nonprofits,

increased the credibility of regional partners/intermediaries as local conveners, and linked SE to broader nonprofit sector building work.

Through the Meet Ups, RSEC partners began mapping SEs and stakeholders in their regions for the first time. Given that there is no common or comprehensive list of nonprofits, social enterprises, or social enterprise supports in Ontario, this was an important step in building effective links to rural and northern nonprofit SEs, particularly as the SE sector in Ontario continues to grow. The Meet Ups significantly increased rural connections and presence on SEontario.org's provincial SE map. The SE mapping at the Meet Ups benefited from outreach for CCEDNet's first provincial SE survey in 2013. The mapping later helped to identify SEs for the 2015 survey.

In bringing together many of the SE stakeholders in the regions, including funders, Meet Ups were critical in raising awareness of social enterprise. This led to important strategic planning work aimed at developing and coordinating SE supports in the RSEC regions.

What we learned

1. **There is not a common definition or understanding of SE.** SE is still not a common term used by rural and northern nonprofits. Since RSEC began its SE development and convening work in rural Ontario, many new social enterprise stakeholders with their own distinct brands and mandates have emerged. This is true particularly in the area of social finance. Newer sector players are defining SE more broadly and moving beyond the bounds of nonprofit social enterprise to include for-profit businesses with social purposes. This leads to confusion within the nonprofit sector about the definition and purpose of SE and makes promoting regional SE events more challenging.

2. **It is difficult to make the case for SE supports.** Key rural stakeholders need to understand where nonprofit SE fits with existing policy, mandates, and mindsets. It is still being determined how and whether SE approaches can assist in a range of areas, including municipal economic development, business retention, cultural mapping, regional tourism, and local food system and/or agricultural development. Reaching out to the right people who can "connect the dots" and champion the cause of rural nonprofits using SE strategies is imperative during this process.

3. **There are more rural SEs than we know.** Collective SE mapping has led to the discovery of many nonprofit social enterprises that had never been seen as such. People across regions were surprised at the number of nonprofit SEs in their communities.

What they said

"We already are operating as a social enterprise. We just didn't have the label. Knowing that we are a social enterprise, although interesting, does not change how we will operate." SE Practitioner

"[Social Enterprise is] an eye opener about a new way to look at social organizations that we take for granted in our community." SE Practitioner

Insights for action

- **Rural place-based innovation in SE warrants support.** Rural and northern communities are developing innovative approaches to CED and SE development based on their unique geographies and issues. This place-based work is under supported at present and would benefit from investment at various stages of development to strengthen and move SE ideas into practice.

- **Documentation demonstrates value.** Continuing to locate, document, and quantify the work of nonprofit SEs in rural and northern communities will help to demonstrate their social and economic value. With this information, key stakeholders such as municipalities, United Ways, and community foundations can better understand how SE fits within their mandates. They will be able to see more clearly the potential impact of investments in and business with nonprofit social enterprise in rural and northern communities. SEontario.org provides a virtual space to share the information gathered; yet more research to continue this documentation would be helpful.

- **Regional intermediaries have a crucial role to play.** There is no one entry point for social enterprise capacity building and supports in most regions. What exists is a patchwork of SE resources and supports. Regional intermediaries have an important role to play in convening nonprofits and SE stakeholders and helping to co-ordinate existing supports, identify gaps, and leverage new SE investment in their communities. Rural and northern intermediaries must be recognized and funded to sustain this work.

4. Place-Based Regional Intermediaries and Stakeholders

Introduction

RSEC recruited intermediaries from four rural and northern regions to partner on their first projects. These invitations were based on previous experience and relationships, credibility and track record, and perceived mission compatibility with the project goals.

Each regional partner is unique. They play different roles and use various approaches to support SE development including incubation of SEs, seed funding, SE education, training and business development, and advocacy and policy promotion. Some of the intermediaries operate their own social enterprises. Many different kinds of organizations played an intermediary role in RSEC, and in the SEDF application process. They were organizations such as: a Community Futures Development Corporation, a local United Way, a community college, a women's enterprise developer, and local CED and SE networking organizations. Yet all of the regional intermediaries shared the RSEC's vision and values.

The regions also have their own distinct set of SE stakeholders, some more closely linked to SE sector building efforts than others. Factors such as regional economic and social conditions, the state of the nonprofit sector, local politics, changes in personnel or mandate(s), the emergence of new players, and historical connections and/or disconnections all contribute to the evolution of regional SE ecosystems. Animating and strengthening these networks requires ongoing convening and coordination efforts. The more networks of SE stakeholders activated, the greater the impacts on the development of strong SEs in a region and effective SE supports.

In the RSEC projects, the four targeted regions progressed at different rates to build on local assets, resources, and networks available for SE development. That work is continuing.

What we learned

1. **Rural intermediaries are best placed to define their own boundaries.** It has been important for regional partners to define their own rural boundaries, based on organizational mandate/mission, the local community and cultural context, and historical work in their areas. Regional partners tended to focus on more than one county (e.g., Huron/Perth and Peterborough/Kawarthas/Haliburton). PARO's activities branched out across the whole of northern Ontario. The Georgian College Centre for Social Entrepreneurship directed its work to the College's internal institutional community and its relationship with the surrounding communities. Georgian College has seven separate campuses, all of them serving rural communities.

    a. In future, RSEC regional and provincial partners might consider supporting defined networks or clusters of SE related activity in the regions as a starting point to build on and grow existing momentum. This might include work with sector clusters such as local food or arts and culture, or within particular towns or communities of interest.

2. **Collaboration in the North is strong.** Regional collaboration across institutions and SE stakeholders is much stronger in the North than in other RSEC partner regions. This appears to be due to the size and breadth of the geography and organizational mandates, the need to co-operate, and the mobilization of key partners in preceding years to consolidate efforts and work together across such vast territory.

3. **Historic relationships often facilitate or trump collaborative planning.** SE work in the targeted rural regions challenges pre-existing mandates and can be hindered by competition among stakeholders, especially when resources are limited. Past working relationships can either present barriers or new opportunities for collaboration. Building regional SE systems and supports requires time, strategic attention to current and possible relationships, and piloting of new collaborations to break barriers and foster more coordinated work.

What they said

"[We'll benefit from] continuing to learn and share from others who have experiences in SE." *Regional Intermediary*

"[Moving forward we'd like to] create working groups or committees around specific initiatives and/or project that would have brings us together in a more practical way." *Regional Intermediary*

"Good overall effort, I hope there are lots of learning to enhance this work to support an important sector." *Regional Intermediary*

"Most regional intermediaries are so stretched that facilitating effective collaboration, networking or even basic information sharing, requires both patience and persistence. If intermediaries' time to collaborate could be paid, it would alleviate much of this pressure." *Provincial partner*

Insights for action

- **Start with intermediaries.** The health of the SE ecosystem depends on rural and northern regional intermediaries' work to advance social enterprise as funders, developers, conveners and advocates. While a recent trend is to fund larger urban based or provincial organizations to build SE capacity across the province, the place-based knowledge and experience of rural SE intermediaries must be recognized. There is an opportunity to support regional intermediaries to take a lead in social enterprise sector development within their own regions, inter-regionally, and provincially.

- **Recognize local contexts in SE system building.** No two rural or northern communities are alike. Each has different assets that can be leveraged for and through SE development; they all have histories that may facilitate or impede effective coordination. A 'cookie cutter' approach to building SE networks and ecosystems in rural Ontario will not work. Recognition and support for the work being undertaken by intermediaries and SE champions in rural communities and in animating their unique networks is critical.

- **Provincial intermediaries play a role in ensuring a strong voice for rural in SE work.** Rural and northern intermediaries have much to learn from each other about doing SE in contexts outside of cities. The more they connect, the stronger their voice will be in the larger sector. Other rural regions around the province have SE stakeholders and intermediaries that are not yet linked to the larger sector or to RSEC. There continues to be a need for provincial intermediaries to reach out to new regions, linking them to each other, and sharing learning to date.

5. Capacity Building with Rural Nonprofits

Introduction

Building the skills and knowledge of rural nonprofits to do impactful social enterprise was one of the core RSEC project strategies.

RSEC facilitated SE learning through 1.5 hour webinars and organization-specific distance and in-person coaching. Webinars, offered in French and English, included sessions on introducing SE, ideas generation, feasibility and business planning, and SE growth. Each webinar was followed by a Q & A and group coaching session a week later and the series of webinars was repeated. CCEDNet Ontario also delivered several webinars showcasing rural social enterprises as part of the LIAISOn project.

Some of the most successful webinars occurred where regional intermediaries hosted groups in one location using the webinar as a community development or professional development opportunity. COIN, one of the RSEC partners, hosted 19 people in total across the webinar series; SERA in Durham County hosted 7 people for each webinar.

Individualized SE coaching was provided free of charge by the RSEC consultant/partners, mostly via teleconference. A total of 56 organizations took advantage of this opportunity. It was typical in this phase of the work to see a number of SE participants, board members, and other volunteers join in the consultations along with nonprofit staff.

RSEC and LIAISOn webinars and coaching results exceeded partners' expectations and project targets.

What we learned

1. **Deciding not to proceed can also be positive.** Not all nonprofits participating in the webinars and coaching decided to move forward on their social enterprise ideas. This is viewed not as a failure, but as a success for the project. It means that nonprofits are thinking strategically about earned revenue strategies and considering the significant risks before investing more time and resources.

2. **Support for early SE development is critical.** Most nonprofits coached through RSEC were at an early stage of SE development. Many organizations need additional supports at this stage to get ready for social enterprise. Identifying funding sources is an important consideration for nonprofits that lack the resources or staff to take bigger steps in exploring or further developing earned revenue strategies.

3. **Scaling and replicating of models is rare.** In a few select sectors, such as local food and youth development, some rural-based models are being considered for replication. Yet this is not a general trend. Local contextual factors can make direct replication often just as difficult as launching a new SE. Scaling is also not guaranteed to be effective – there is still significant risk when nonprofits expand or enter into new markets.

4. **SE development is organizational development.** It takes time to successfully integrate SE into a nonprofit organization. Some nonprofits require a review of their mission or a more involved process of organizational development or program design before they can determine how best to develop a specific business idea. It can take many months to move forward. This is especially true if the work is managed by volunteers or overtaxed staff, or if it requires buy-in from other staff, board members, or community stakeholders.

What they said

"It was very useful to link with SE experts who have high level knowledge, experience, and understanding of the concepts, hear about shared experiences, challenges and opportunities, and connecting to high value web links, reports and documents for further research and study was very useful." *SE Practitioner*

 "I appreciated the opportunity to get to know others on the call from different regions and to discuss what this stuff actually looks like on the ground. It's important to understand a sort of ideal process but in the Q & A we were able to talk about the different ways in which this work actually happens." *SE Practitioner*

"[We learned] that we are not ready yet to do social enterprise, that we need to strengthen our Board, that we need staff, and that we have several assets that we were not aware of. Having more coaching on the actually planning and implementation phase would be appreciated. Specifically, how you build SE into the model of your organization/program, as well as culture."
SE Practitioner

Insights for action

- **Investing in the system includes investing in direct capacity building.** Rural nonprofits want and need to learn more about how to strategically engage in earned revenue strategies. Participants in RSEC capacity building activities are especially interested in knowing the steps in the SE development path, being exposed to SE models and tools for developing earned revenue, and sharing with peers. RSEC identified sufficient need to warrant more investment in SE capacity building with rural and northern nonprofits.

- **Root sector building and policy in on-the-ground experience.** Coaching with individual organizations allowed RSEC project partners to learn more about what is happening in the rural SE, CED and nonprofit field, to see patterns across regions and sectors, to understand challenges faced by rural nonprofits, and to mentor emerging practitioners. Documenting and sharing this perspective is important for the development of the broader sector. It also helps ensure that the stories of rural and northern SEs are heard by sector stakeholders across the province including policy makers.

- **Rural-urban exchange would benefit SEs in both contexts.** Models for urban SE are being analyzed for how they best fit in rural contexts. However, there does not appear to be a similar sharing of effective rural models with city-based practitioners, or an appreciation of the need to significantly adapt urban models to fit rural realities. CCEDNet Ontario included both urban and rural case studies in its SE webinar series. More of this type of exchange would be useful.

- **Promote effective SE models.** There is an opportunity to document and promote, with appropriate adaptations, some of the most effective SE examples across urban and rural constituencies. This would generate more awareness and linkages between rural and urban constituencies and contribute to a more integrated SE sector while taking into account local concerns and needs.

- **Volunteer-run organizations require special consideration.** Social enterprise in smaller rural and northern organizations with large mandates and service areas requires sensitivity to the role of volunteers and the challenges of understaffing. Additional resources would enable these nonprofits to more actively engage in SE.

6. Practitioner Development

Introduction

With years of experience in SE, RSEC partners recognized the need not only to build the knowledge and skills of nonprofits interested in social enterprise, but also to increase the capacity of the consultants and practitioners who are helping them.

Nonprofit SEs are developed within a sector that frequently faces unique challenges and accountabilities arising from their nonprofit, charity, or co-operative corporate structures. They must engage multiple stakeholders including funders, local businesses, clients, board members and other volunteers, as well as the general public in their enterprising work. These accountabilities are felt particularly by rural and northern nonprofits that closely interact with their communities and rely on fewer staff and more volunteers. CCEDNet's SE research confirmed this rural reliance on volunteers.

The complexities of nonprofit and rural SE amplify the need for specialized knowledge of business development and nonprofit sector contexts to help reduce the risks. Few consultants, in particular private sector business developers, have this background knowledge. RSEC addressed this by working with practitioners and consultants to build their capacity to effectively coach rural and northern nonprofits in social business development through two practitioners' institutes. Regional consultants and emerging practitioners were also mentored by RSEC consultants.

The RSEC practitioners' institutes demonstrated an appetite for consultants and SE developers to network and learn collaboratively. They also revealed a desire for more peer sharing and analyses to contribute to broader learning within the SE and the nonprofit sectors.

What we learned

1. **SE practitioner learning spaces are few.** Opportunities for social enterprise development practitioners and consultants to meet and develop their practice are rare. The RSEC practitioners' institutes have been very well received because of this. RSEC partners recruited some participants to become involved as social enterprise developers in their regions. Having emerging and mature practitioners together strengthened the two-day gatherings.

2. **Coaching nonprofits differs from small business consulting.** Business coaches working primarily with and trained in the private sector are often not aware of the support, resources, and systems required for nonprofits to develop their SE ideas. They frequently focus on the business and entrepreneurial aspects of SE development and not the organizational change and capacity-building efforts that are also needed.

3. **Some rural nonprofits need advisors/coaches from outside their region.** Rural organizations are not always comfortable revealing their internal challenges to local consultants who may be influential in their community or linked to other organizations. Increasing anxiety in the nonprofit sector regarding competition for funding leads many organizations to "hold their cards close to their chests." Advisors from outside the region can sometimes provide support being mindful of but not interfering with local community dynamics.

What they said

"The tools that were provided are also going to be very, very helpful." *Institute Participant*

"I left [the institute] feeling like I was more ready than I realized to work with other social enterprises through the development phase." *Institute Participant*

"One size fits all is a myth!" *Institute Participant*

Insights for action

- **Field building with practitioners will increase the quality of support.** Practitioners and consultants interested in working with nonprofit social enterprises need specialized knowledge and skills. In addition to offering more practitioner development institutes there is a role for SE intermediaries in convening communities of practice and brokering mentorship opportunities to ensure that more effective coaching supports are available to rural and northern nonprofits.

- **Train private and public sector business consultants.** Training in nonprofit SE development for consultants from the private sector, as well as business developers working in rural municipalities and in provincial and federally funded enterprise development services, will improve their likelihood of success in working with nonprofits. It will also increase nonprofits' access to appropriate SE coaching and other supports. Training should be targeted to specific networks such as EDCO, OACFDC, and OMAFRA regional advisors.

- **Sustainable training models are needed.** The RSEC practitioners' institutes do not currently have a sustainable financial model. Further market research is required to determine if prospective participants are willing and able to cover the full cost for future institutes. Other institutions such as Nordic Institute and Georgian College have expressed interest in hosting institutes.

- **Support emerging and next generation rural SE practitioners.** Emerging practitioners continue to need support and mentorship to link to learning opportunities in the SE sector. One way to address this need is to provide SE internships, such as those hosted by CCEDNet Ontario early in the project; this warrants further exploration.

7. Post-Secondary Research and Engagement

Introduction

There is very little research or formal curricula in Ontario's post-secondary institutions specifically addressing rural and northern social enterprise development. Little attention is paid to the important role of nonprofits and nonprofit SE in rural and northern regions. Few students are aware of the unique conditions faced by nonprofit SEs in these regions.

To begin to bridge the knowledge and research gap, RSEC explored several educational models and opportunities for engaging post-secondary students as emerging rural social enterprise practitioners and researchers. The project piloted strategies for embedding post-secondary learning and academic and community-based research about rural SE into RSEC partners' programming.

The University of Guelph, School of Environmental Design and Rural Development (SEDRD), was a key collaborator and one of RSEC's provincial partners. As a result of partnering in RSEC, SEDRD hosted a graduate level course on SE policy and has been involved with three research projects focused on rural SE. They now have more informed faculty and one MA and three new PhD students who are focusing their research on rural SE. Georgian College's newly formed Centre for Social Entrepreneurship became RSEC's regional partner for the Greater Simcoe County in Year 3 of the project. It has fully embraced its role in growing students' competencies related to social entrepreneurship in the nonprofit sector and supporting SE within the College and in the larger community, including setting up a regional SE network.

Early in the project a list of rural SE research questions was shared with students and faculty at SEDRD. Several of the key questions were integrated into a successful funding proposal to the New Directions Research Program of the Ontario Ministry of Agriculture and Rural Affairs (OMAFRA). The research, completed in 2015, aims to increase understanding about systems of support and policy leverage points for rural and northern social enterprises. Findings will be shared on SEontario.org.

RSEC also piloted an intensive Mobile Rural Social Enterprise Policy Institute course at University of Guelph in 2014. This course introduced graduate students and faculty to rural SE by visiting SEs and stakeholders in four southwestern counties. At the same time it gave community-based rural enterprises a chance to reflect on and discuss their work in the context of a larger sector. The course led to increased involvement in SE for at least three of the five graduate students in attendance.

What we learned

1. **Post secondary institutions play a key role.** Universities and colleges have an increasingly important role to play in supporting rural and northern nonprofits involved in social enterprise. Academic and community-based research, formal curriculum development, and community placements and service learning can all contribute to the sector's vitality. Students and faculty in our partner institutions are receptive to learning about SE. The support of colleges and universities and their students is also a significant resource for rural and northern organizations that could not otherwise access resources for evaluation, research, or practical support.

2. **Changing curriculum takes time.** Change in curriculum at the post secondary level is dependent on many factors that cannot be addressed in a three-year project. A longer view for strategically building core curricula on rural SE in Ontario is needed. Although the timeframe for the RSEC project did not allow for integrating a standing rural SE course into the curriculum at SEDRD, the possibility is now real given the growing interest and knowledge of key faculty. For Georgian College, the creation of curriculum and core programming related to social enterprise and social entrepreneurship was supported through its relationship with RSEC. This success was possible due to the presence of well-positioned internal champions and the new mandate and funding resources invested in the Centre for Social Entrepreneurship.

What they said

"My involvement has been a very positive experience, I have developed a much deeper understanding of SE work and I am delighted it is now part of my research program." *Academic Partner*

"We offered a course in rural SE and we now have students doing research in this area." *Academic Partner*

"It would be helpful to encourage further engagement by graduate students - including additional research and learning opportunities." *Academic Partner*

Insights for action

- **Engage post-secondary students in SE.** Involving students in academic and community-based research, service learning, and placements with rural and northern social enterprises provides a bridge for young and emerging practitioners to learn about and connect with the sector. With this experience they can consider how they might be further involved in SE through their careers.

- **Students provide important capacity for nonprofit SEs.** Post-secondary student placements and community-based research partnerships with SEs can help nonprofits expand their SE capacity. Intermediaries can play a role in brokering links between post-secondary students and local SEs. These partnerships must be developed with the needs and priorities of the nonprofits front and centre to ensure that the support is relevant to and adds value for rural and northern nonprofits.

- **Integrate more information on rural SE into post-secondary courses.** Up-to-date and relevant information on rural and northern SE and nonprofits can and should be integrated into existing university and college curricula. This strategy requires further research on current courses and departments across Ontario that would be most receptive. The rural SE case studies currently on SEontario.ca and the RSEC New Directions research will provide useful curriculum material for future courses.

- **Advocate for courses specifically on northern and rural SE.** In light of the University of Guelph's SEDRD's rural mandate, introducing a formal course on SE at SEDRD should continue to be a focus for the RSEC partners. This will build a uniquely rural stream of study on nonprofit social enterprise. Similar work could be done with a northern university to ensure relevant research on the North and opportunities for students in SE practice.

8. Rurality and SE Policy

Introduction

RSEC's initial projects did not focus on policy. However, partners learned a great deal about rurality and policy over the course of the projects.

Nonprofits directly respond to distinct rural and northern characteristics, including geography, distance related to service delivery areas and access to services, culture, economies of scale, environment, and stewardship. These same conditions impact nonprofits' capacity to be resilient and innovative and to contribute to their community's health. Community economic development (CED) and social enterprise are important strategies not only for sustaining rural nonprofits, but also for providing place-based solutions to community issues and retaining local assets such as services, jobs, culture or heritage, small businesses, people, and environmental or natural assets. Policy plays a major role in supporting or inhibiting the efforts of rural and northern nonprofits pursuing SE.

Collaborative work like RSEC's allows partners to connect policy to the everyday practice of nonprofit SEs in communities. Through the projects, RSEC partners integrated learning on rural and northern SE practice into their collective reflections on how to create enabling policy environments for a sustainable nonprofit sector and resilient communities.

As a result, ONN and CCEDNet began considering how rurality affects their own work, their constituencies and their policy positions. The field of social enterprise is a good example of how provincial policy work can also be seen through a place-based lens and be integrated with other policy files. For example, SE is linked to ONN's policy work on hybrid corporations, the nonprofit labour force, the use of public lands, and social procurement. Rural SE also connects directly to CCEDNet's Action for Community Economies policy priority, promoting purchasing through, and investing in, community enterprises, as well as its broader work on people-centred economies.

Regional RSEC partners are better informed about, and linked to, ONN and CCEDNet's related policy work. Partners' experiences as practitioners and intermediaries in their own rural and northern regions are also being integrated into broader provincial policy discussions with other RSEC members.

RSEC's third project, an OMAFRA New Direction Program funded research project (Rural Social Enterprise and Community Ecosystem Development: Policy Leverage Points) resulted from the need identified by partners for more research on policy leverage points affecting rural and northern social enterprises

What we learned

1. **Rural identity has unique characteristics, related to each specific place.** Working with rural and northern SEs and nonprofits presents its own set of challenges and opportunities. In the RSEC regions, relationships and historical/cultural factors are important and distinct to each place even as those regions share some challenges common to rural communities. Successful social enterprise sector development, including policy development, addresses these realities and capitalizes on them.

Clarity about rural identity has been more evident in Northern Ontario and in Huron County. Ultimately, RSEC's northern partner linked with other stakeholders across the North and spent less time connecting with other more southerly partners in the project. Huron County stakeholders created a Huron County policy lens to inform local development. While other regional partners did not initially articulate how their work was rurally focused, they now do.

2. **Nonprofits and SEs provide jobs in rural communities.** Social enterprise can be a strategy to retain nonprofit jobs and services. This is especially important for policy makers to consider given the dependence on a limited number of jobs in rural service agencies, large service areas covered, and the high demand for those services. SE can also be a strategy to create jobs, an objective that fits with provincial and federal policy priorities. According to CCEDNet's first SE survey report, rural social enterprises employed 28,000 people in 2012. Yet, compared to nonprofits in cities, fewer rural organizations appear to be testing models for employment development social enterprises that create jobs for marginalized persons. Of all of the SEs of this type surveyed in CCEDNet's 2012 SE research only 26% were rural compared to 74% in cities.

3. **Social enterprise is a cross-sector strategy.** The private and public sectors play a role in rural social enterprise along with the nonprofit sector. For example government and private businesses can advance social procurement or develop sector strategies that include nonprofit SE such as in the culture, tourism or local food sectors. In rural communities, cross-sector collaboration and leadership results in innovative SE interventions that retain or create services and jobs. These collaborations are often informal and the leadership comes from diverse individuals and organizations.

4. **Policies impact rural and urban organizations differently.** Policy decisions related to service provision may be experienced differently in rural and northern regions than in urban areas. They may in fact have more adverse effects on rural organizations and communities. This will directly impact their social enterprise efforts.

5. **Rural municipalities can support nonprofit SE.** Municipalities are in a position to act as intermediaries or champions in supporting local SE development. Some rural municipalities already play a role in SE development and are coordinating or aligning their work with other key SE stakeholders in their communities. Yet this work is not well documented and promoted. Other rural municipalities are ready to capitalize on the links between nonprofit SE and their mandates and programs.

6. **Rural municipalities need money too.** Some rural municipalities may find themselves in competition with local nonprofit or co-operative social enterprises, for example, in recreation, telecommunications, affordable housing, and adult learning. Small municipalities are financially stretched and may benefit from the use of municipally-owned or cross-sector SE strategies to maintain or develop service offerings or create new sources of revenue.

7. **For-profit SE is gaining ground.** Recent provincial policy focusing on supporting for-profit social purpose businesses has somewhat eclipsed attention to nonprofit SEs, particularly those outside of urban areas. It is also influencing the definition of social enterprise success and scale. It is difficult to compare nonprofit SE with for-profit businesses given the accountabilities of nonprofits to multiple stakeholders.

Insights for action

- **Rural SEs could provide employment for the hard-to-employ.** SEs used as a job development strategy could be a useful addition to workforce development strategies in rural areas and a fit with provincial and federal policy priorities. There are many training and employment focused SEs in urban areas that can be models for rural communities to use and adapt to their own unique contexts.

- **Making the case for SE support requires reframing.** There is work to do to reframe SE in ways that are more conducive to leveraging specific policy and supports at the municipal, county, provincial, and federal government levels as well as with other funders.

- **Link SE with local small businesses.** Small businesses can play an important role in rural areas with respect to social enterprise. For example, SE development can be a strategy for succession planning when family businesses are being closed, particularly as baby boomers retire. Many private sector leaders are currently involved in SEs and learning more about how the nonprofit and for-profit sectors can work together. The links between small business and SEs in rural and northern communities should be further examined.

- **Promote rural and place-based policy lenses to encourage SE.** The unique contexts across rural and northern communities must be taken into account when drafting SE policy. With growing interest in SE, there is need now for the promotion of rural and place-based policy lenses with the provincial and federal governments. It will be important to demonstrate the links between SE and community economic and social outcomes generated by rural and northern nonprofits.

- **SE policy work with rural and northern municipalities shows potential.** Making connections between nonprofit social enterprise and municipal policy mandates related to local economic and social development will be particularly fruitful. Such connections could assist communities in areas such as employment creation and income security, affordable housing, cultural development, youth development, land use, local food, alternative energy, and social procurement. Identifying and sharing effective practices in municipal involvement in SE would help support more place-based SE policy and further municipal investment in SE.

- **Align SE policy and funding.** Further attention should be paid to alignment of policy and funding related to nonprofit SE at the municipal, regional, provincial, and federal levels. All these levels are influencing rural and northern SE development yet there is little or no collaboration or co-ordination of efforts and policy directions. Few rural communities are accessing funding from all three levels of government. Most are not aware of relevant funding opportunities and/or have difficulty competing for funding for their innovative SE work. If SE development in rural and northern communities is to be effective, it needs to be supported in a more coordinated way from all levels of government.

9. Rural SE and Ecosystem Evolution

Introduction

RSEC has aimed not only to build relationships and partnerships among rural and northern SE intermediaries but also to link rural social enterprises, intermediaries, and other stakeholders to the larger provincial SE ecosystem.

By increasing awareness of and sensitivity to rural and northern SE approaches and supports, the whole SE field can benefit. In Ontario, the ecosystem is not well coordinated. It is also rapidly evolving with many new players including investors, funders, consultants, and social enterprises – both nonprofit and for-profit.

What we learned

1. **Focus is shifting to for-profit SE and urban intermediaries.** Attention to for-profit SE models threatens to eclipse work with nonprofits, particularly in rural contexts. The Ontario government has demonstrated an interest in investing in the field, yet policies and funding to date are focused on a mandate of job creation, self-employment, and private sector engagement rather than nonprofit resiliency and community engagement. The sector is also being shaped by new developments and investors' interest in social finance and social impact bonds. It is more difficult to make the case for funding for nonprofit SE sector building efforts.

2. **SE sector convening and collaboration requires an enabling environment.** The right conditions are necessary for rural co-ordination and convening at both provincial and regional levels. RSEC has set the stage for stronger regional and cross-regional approaches that have allowed for dynamic network building. Rural SEs and intermediaries still lack strong links to the larger sector, although this is beginning to change. RSEC's contribution to the development of rural research pages on SEontario. org is providing a showcase for sector-based rural voices.

3. **Support within the sector for both regional and provincial networking has been minimal.** There are many more players coming into the SE ecosystem, many with limited knowledge of SE and nonprofit realities. A collaborative sector-building agenda is yet to emerge that focuses on supporting the linkages and coordination between urban and rural SE.

4. **There is potential for more connections with rural networks.** Some potential champion organizations and networks are not linked to RSEC's work. RSEC partners connected with some rural municipalities and with the provincial network of agricultural societies. Linkages with Aboriginal communities were limited to those in the north through SENO.

5. **Other rural sectors are engaged in SE development.** Rural municipalities, colleges and school boards operate social enterprises. These specialized SEs do not currently link to the SE sector.

What they said

"I recognize that for nonprofits to continue to do their good work, the government will continue to have an important role in supporting them financially and through enabling policies - even as some become more entrepreneurial and able to generate unrestricted revenue from earned sources." *Partner*

"I'd like to explore more ways to share effective models of social enterprise across rural and urban regions, and methods for assessing the viability and fit of the models in different contexts. I'd also like to explore more opportunities for conversion of businesses to nonprofit and co-operative social enterprises." *Partner*

"We will be developing a sustainable program to support and fund social enterprise across Northern Ontario." *Partner*

"It was inspiring to see the potential power of networking regional intermediaries when, working with just five disparate rural intermediaries, we were able to collectively engage 48 partners and leverage over $400,000 for the support of rural SE development" *Provincial partner*
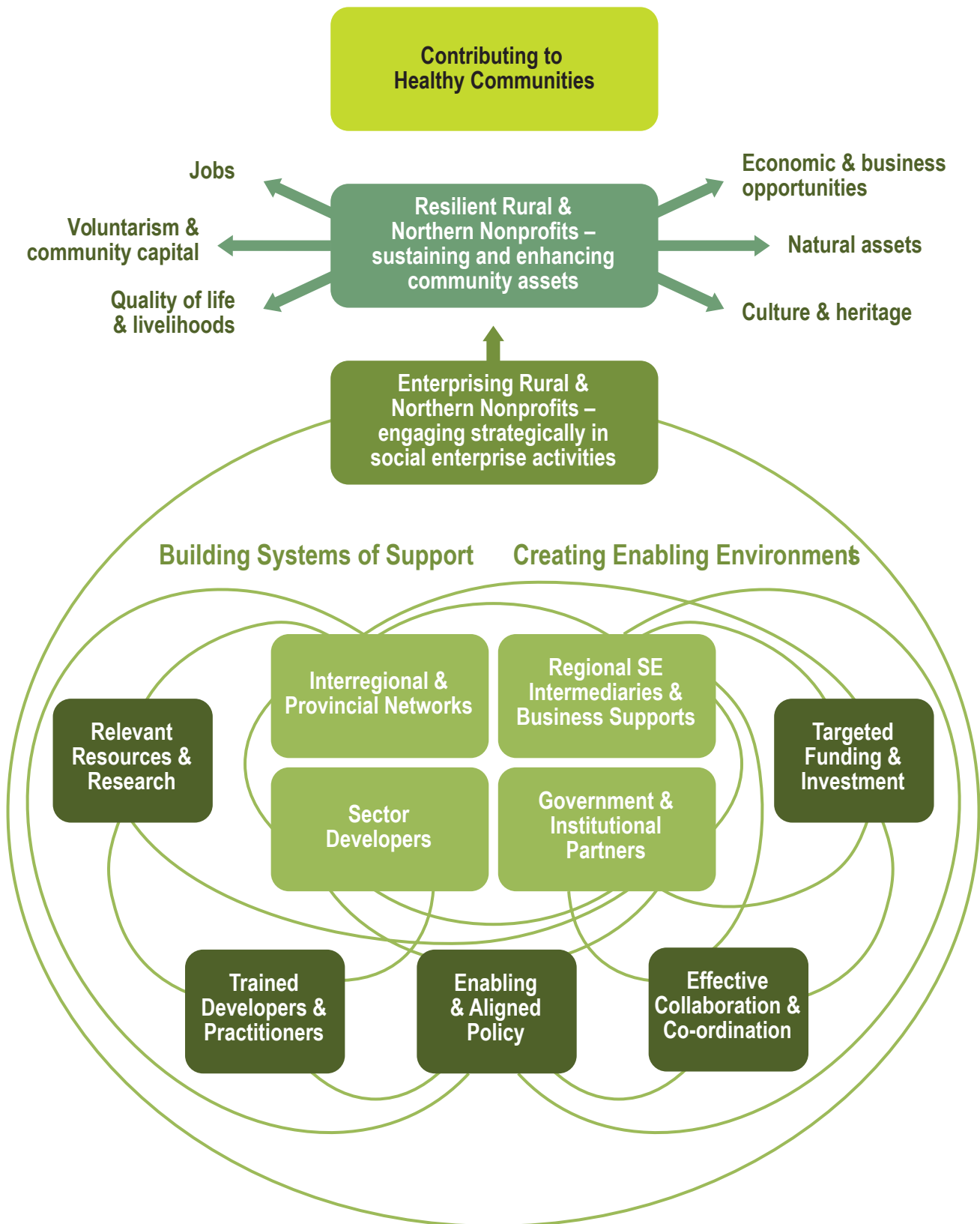
Insights for action

- **Build connections across the SE ecosystem in a collaborative non-competitive way.** Leadership is needed in the SE sector in Ontario to bring together key players, promote an understanding of the different perspectives on what social enterprise can and should aim to accomplish, and begin to develop a common agenda. The voices of nonprofit rural and northern SE practitioners and intermediaries must be included in this dialogue.

- **Create a network of regional intermediaries.** Given competition for resources and the lack of co-ordination at the provincial level currently, it makes sense to continue to strengthen rural and northern regional and interregional linkages. With stronger activity and networks at these levels it will be easier to make connections to provincial and national work and build a strong provincial sector. Intermediaries need capacity and funding to carry on the role of convening and coordinating supports for SE.

- **Join networks together.** There are a number of distinct communities and networks that have not yet been connected to RSEC or the SE ecosystem in the province. Community Future's Development Corporations, Aboriginal development funds, specific nonprofit networks such as Community Living or environmental networks, employment-focused organizations, and local economic development officers and regional rural advisors all have a role to play in nonprofit SE and should be linked in to work in regions and at the provincial level.

  The inclusion of more networks will expand the potential avenues for SE development and expand the pool of resources and organizations for collaborative action. A first step would be to map those networks and communities and gauge their interest in this field.

The diagram below illustrates assumptions embedded in RSEC's model for change, encompassing its overarching vision and the strategies and preconditions for achieving that vision. The model describes how diverse stakeholders can work together to assist rural and northern nonprofits in developing effective social enterprise strategies and, by extension, contribute to building healthy communities.

RSEC Model for Change

Contributing to Healthy Communities

Jobs

Economic & business opportunities

Voluntarism & community capital

Resilient Rural & Northern Nonprofits – sustaining and enhancing community assets

Natural assets

Quality of life & livelihoods

Culture & heritage

Enterprising Rural & Northern Nonprofits – engaging strategically in social enterprise activities

Building Systems of Support

Creating Enabling Environments

Relevant Resources & Research

Interregional & Provincial Networks

Regional SE Intermediaries & Business Supports

Targeted Funding & Investment

Sector Developers

Government & Institutional Partners

Trained Developers & Practitioners

Enabling & Aligned Policy

Effective Collaboration & Co-ordination

10. Where We Landed: Summary of Outcomes

RSEC and its projects have been impactful in many ways beyond the expectations of its partners. Beneficiaries have included:

- the founding partners
- rural intermediaries from newly engaged regions
- participants in the capacity building work, including nonprofit staff, volunteers, directors
- funders and other SE regional stakeholders
- post secondary students and emerging practitioners, and
- SE consultants

RSEC's project budgets and deliverables did not include a formal full-scale evaluation. Yet its learning culture and the various ways that data was collected for project management and funder reports allowed the partners to document the positive changes that occurred as a result of RSEC's efforts. RSEC partners used reporting as an opportunity to reflect on and revise their thinking about the initial project theory of change and the work that still needs to be done.

Appendix B summarizes the richness and breadth of the outcomes documented by partners and participants in the RSEC projects.

11. What Still Needs to be Done?

As the initial Trillium-funded RSEC projects conclude, further work to sustain momentum is underway. RSEC partners are integrating rural perspectives and SE into their work on policy, capacity building, and the production of communications and networking resources. RSEC regional intermediaries are linking their work to the larger sector and capitalizing on their connections locally and provincially to build stronger supports for SE. RSEC research through the New Directions project is highlighting more rural and northern SE stories. This research is also identifying key policy leverage points to discuss with municipal, provincial, and federal policy makers. The University of Guelph has obtained two years of research funding on "The Role of Municipalities as Intermediaries in Social Enterprise Development," to be conducted between 2015 and 2017. This new research will provide a guide to effective practices for municipalities interested in supporting SE development in their regions.

Regional and provincial RSEC partners continue to explore the possibility of a next stage collaboration that focuses on collective impact and outlines a process to measure the collective impacts of rural and northern SE ecosystem work.

To further leverage the significant outcomes of these initial collaborative projects, RSEC partners recommend that local, regional, and provincial intermediaries be supported to implement the following strategies. These consolidate and prioritize the "insights for action" captured in this report:

Strengthen Capacity

- Deepen the capacity of rural and northern nonprofits to engage strategically in social enterprise activity
- Build the knowledge and skills of people who support social enterprise development
- Enable rural, regional, and northern intermediaries to take a lead in social enterprise sector development

Create Connections

- Invest time and resources in growing rural and northern regional supports for social enterprise
- Create spaces for rural and urban social enterprise practitioners to connect, share and co-create the social enterprise landscape
- Align regional, provincial, and federal funding to support local social enterprise activity

Share Knowledge

- Understand and learn from existing rural and northern social enterprise innovations and initiatives
- Embed social enterprise theories, practices, and research into post-secondary curricula and programs
- Conduct and share post-secondary research on rural and northern social enterprise

Align policy

- Advance policy and programs that enable social enterprise
- Promote the use of policy lenses that account for rural and northern realities, voices, and differences

APPENDIX A: WHAT WE DID

The following appendix provides insight into the activities of the RSEC project. It provides data on the types of engagements pursued and accomplished throughout the projects, including some data regarding the organizations and participants engaged.

1.   *Rural Social Enterprise Collaborative:*

The collaboration was a success in terms of shared vision and values; a great deal was accomplished based on the collaborative relationships that were nurtured.

The following outputs demonstrate the success of an effective collaboration:

- All partners had a shared vision with a clear Memorandum of Understanding
- Partners developed a structure with a secretariat as the convener and took on a project management and delivery function
- Regular secretariat meetings made it possible to keep an eye on project deliverables, learning, and course correction as needed
- Project funds were distributed directly to each regional intermediary for them to further rural social enterprise development according to their specific contexts
- A robust tracking and evaluation system was put in place
- Regional representatives were supported to host multiple regional events
- RSEC's secretariat consultants worked strategically with teams to plan for their role as intermediaries and leverage additional support for social enterprise in their region
- Regional representatives were engaged wherever possible in RSEC reflection and planning discussions and decisions

2.   *Regional Networking and SE Mapping:*

Deliverable = 6 Meet Ups
Delivered = 6 Meet Ups

Peterborough/Durham/Kawarthas (2012):
Participants – 20

Huron Perth:
Participants – 49

Thunder Bay and the North:
Participants - 45

Simcoe County:
Participants – 49

Peterborough/Durham/Kawarthas (2014):
Participants - 72

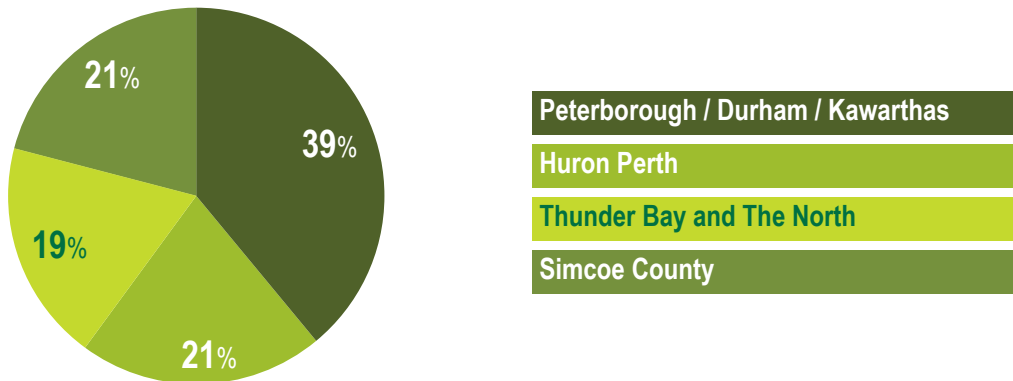Number of people attending Meet Ups:
Total – 235

Number of unique organizations represented at Meet Ups:

Peterborough/Durham/Kawarthas – 67
Huron Perth – 42
Thunder Bay and the North – 37
Simcoe County – 41
Total – 187

The evaluation information gathered throughout the project provided good information about the diversity of people and organizations that attended the capacity building events. The following graphics provide information about where attendees came from, the types of organizations they represented, their roles, and organizational missions.
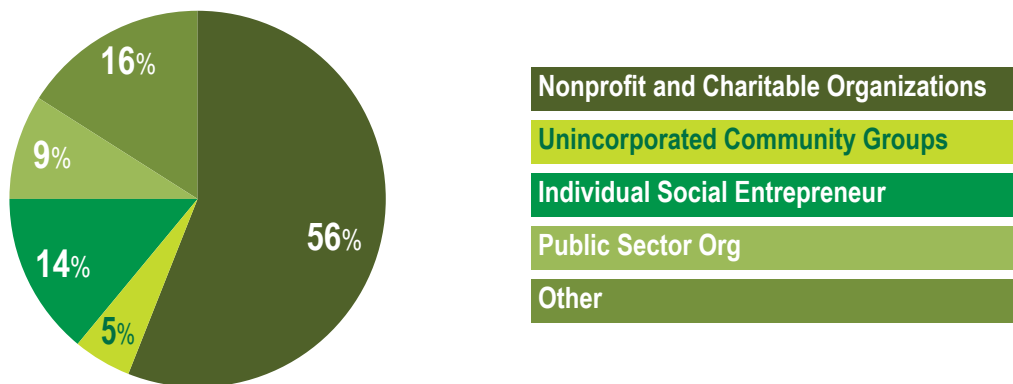
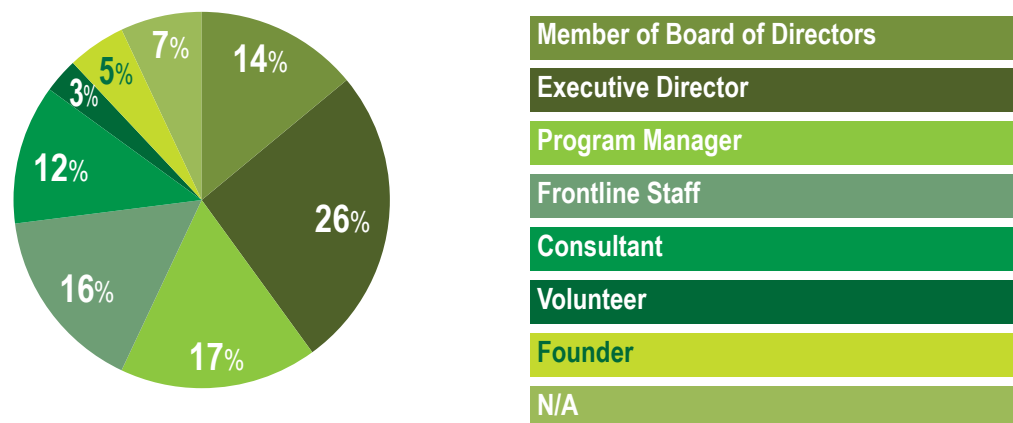### Workshop Participants

Data taken from attendance lists

Peterborough / Durham / Kawarthas	39%
Huron Perth	21%
Thunder Bay and The North	19%
Simcoe County	21%

Type of Organization

Data taken from Meet Up Registration (n=60)

Nonprofit and Charitable Organizations	56%
Unincorporated Community Groups	5%
Individual Social Entrepreneur	14%
Public Sector Org	9%
Other	16%

What is your role in the organization?

Member of Board of Directors	14%
Executive Director	26%
Program Manager	17%
Frontline Staff	16%
Consultant	12%
Volunteer	3%
Founder	5%
N/A	7%

Focus of Organizational Mission

Pie chart legend:
- Agriculture
- Social Development / Social Services
- HR Development
- Economic Development
- Environment
- Educational Institution
- Health Institution
- Recreation
- Housing
- Arts & Culture
- Food Security
- Other

Pie chart values: 10%, 22%, 10%, 19%, 2%, 11%, 2%, 2%, 3%, 8%, 7%, 4%

3.   Place-based Regional Intermediaries and Stakeholders:

In each region, we conducted an assessment of regional networks. This information was shared with regional RSEC partners and was used to stimulate strategic discussions.

Partners, supported by consultants, met with regional stakeholders (e.g., funders in Peterborough/Haliburton, and Northwestern Ontario; full stakeholder meeting in Simcoe County, funders in Huron County).

In Northern Ontario a new collaborative of funders and interested organizations was formed. Social Enterprise in Northern Ontario (SENO) successfully applied for funding through the Provincial Social Enterprise Development Fund.

In Greater Simcoe County, RSEC work contributed to collaborative work on a community of practice through Georgian College.

4. *Capacity Building with Rural Nonprofits*

WEBINARS

Deliverable = 8 total capacity webinars including 1 French and for LIAISOn
Delivered = 20 total including 5 French
200 people participate

COACHING

Deliverable = 56 rural organizations participate in coaching processes
to develop SE strategies
Delivered = 120

Deliverable = 22 rural organizations develop venture criteria/pre-feasibility
Delivered = 38

Deliverable = 34 rural organizations engage in feasibility studies, market research,
strategic planning and/or business planning
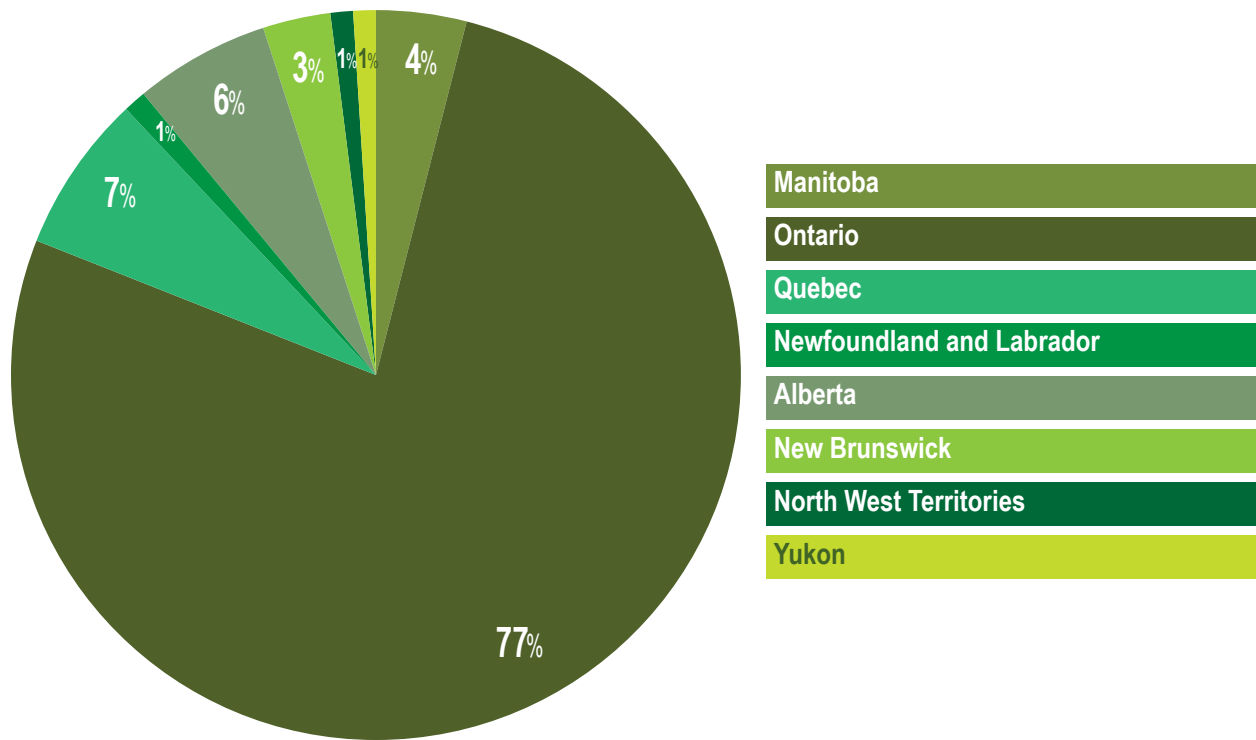Delivered = 52

PEOPLE INVOLVED IN CONSULTATIONS

Staff   72

Participants   103

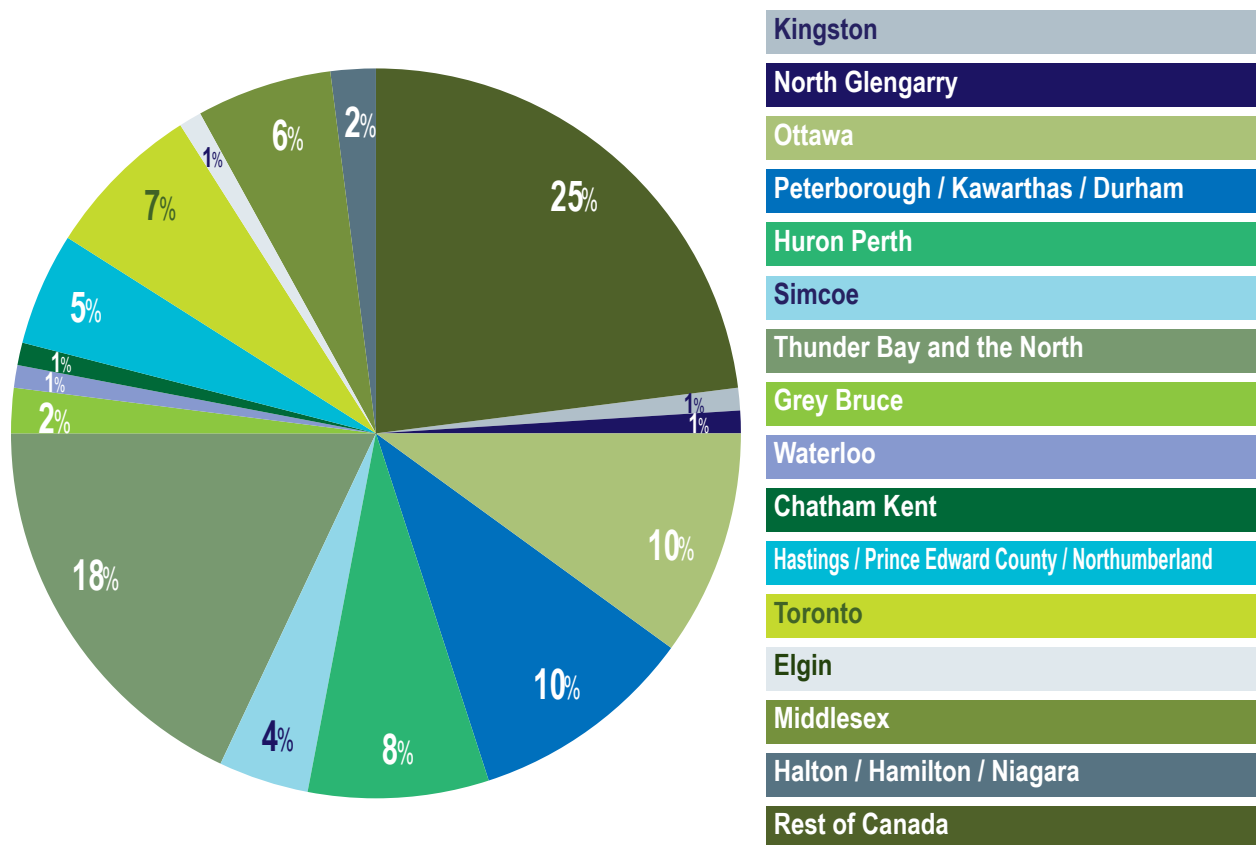Volunteers   136

Board Members   57

PRESENTATIONS

Presentations at Mowat, Ontario Nonprofit Network Conference, ANSER, SET, Canadian Rural
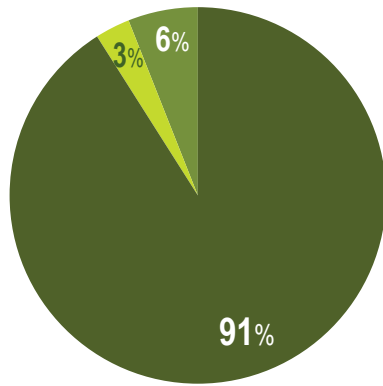Foundation, Rural Ontario Municipalities Association 2013, 2014

Webinar Participants by Province

Legend
Manitoba
Ontario
Quebec
Newfoundland and Labrador
Alberta
New Brunswick
North West Territories
Yukon

Webinar Participants by Region in Ontario

Legend
Kingston
North Glengarry
Ottawa
Peterborough / Kawarthas / Durham
Huron Perth
Simcoe
Thunder Bay and the North
Grey Bruce
Waterloo
Chatham Kent
Hastings / Prince Edward County / Northumberland
Toronto
Elgin
Middlesex
Halton / Hamilton / Niagara
Rest of Canada

Type of Organization

Nonprofit and Charitable Organizations	91%
Unincorporated Community Groups	3%
Public Sector Org	6%

What is your role in the organization?
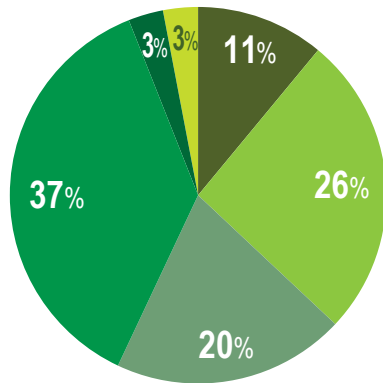
Member of Board of Directors	11%
Executive Director	26%
Program Manager	20%
Frontline Staff	37%
Consultant	3%
N/A	3%

Focus of Organizational Mission

Agrigulture	3%
Social Development / Social Services	46%
HR Development	8%
Economic Development	6%
Environment	5%
Educational Institution	8%
Health Institution	5%
Recreation	8%
Housing	5%
Arts & Culture	3%
Food Security	3%
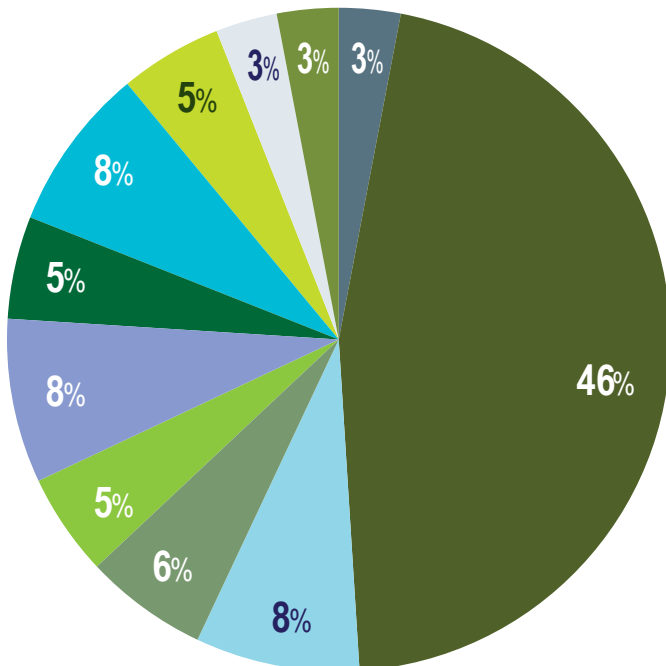
### 5.	*Practitioner Development*

Deliverable = 1 institute per region
Designed 2-day detailed curriculum and tools suitable for replication.
Delivered = 2 cross-regional institutes with a total of 58 participants from
across the province.

People came from all over Ontario – not just from regions we were working in. There were participants from Toronto, Ottawa and Chatham at the Institutes.

Worked with emerging practitioners in each region to include shadowing and co-facilitation of events and consultations.

### 6.	*Post-Secondary Research and Engagement:*

- Generated list of research questions shared with University of Guelph graduate students to prompt research

- Provided 2 presentations on rural SE to students and faculty at SEDRD

- Planned and facilitated a Mobile Rural Social Enterprise Policy course through University of Guelph; 5 graduate students attended; included site visits with 10 social enterprises and stakeholders in Guelph-Wellington, Oxford, Perth and Huron Counties

- One student from the course applied for a PhD with intention of doing research on social enterprise; another MA graduate is now working on the 2015 SE in Ontario survey with one of the RSEC provincial partners

- Engaged students in action research on awareness and involvement in SE among rural municipalities at: ROMA/OGRA 2014, and 2015 conferences

- 2 Practitioners Institutes at University of Guelph and Trent University

- Tested a model for working with post-secondary students through the Institute for Community Engaged Scholarship Institute (ICES) at University of Guelph; hosted a rural social enterprise table and engaged 7 students in rural SE case study development to be posted on SEontario.org

- Supported Georgian College in the development of its Orillia campus Centre for Social Entrepreneurship

- Successfully applied for research project on rural social enterprise development supports and policy leverage points; research taking place from July 2013 - September 2015

- Presented at 2014 Rural Networking - Research into Action Day, OMAFRA's rural research knowledge sharing event

- Additional research recently funded for a PhD student (RSEC team member) on "The Role of Rural Municipalities as Intermediaries in Social Enterprise Development." This research will be completed in 2017.

- U of Guelph faculty has become more interested in and engaged in SE research

- U of Guelph is exploring the idea of hosting an international institute on 'rural social enterprise as a revitalization strategy'

- COIN introduced material on SE into a course on CED at Trent University

7. *Rurality and SE Policy*

- Accessed New Directions funding to study the SE Eco System in Rural Ontario

- Delivered a MA level mobile policy course at the University of Guelph

8. *Rural SE and Eco-System Evolution*

- Mapped SE supports in 4 rural regions

- Identified SE operating in 4 rural regions

- Mapped SE activity in Ontario in 2012 and 2015

- Linked to the Ontario Social Economy Roundtable and participated in the planning activities throughout 2014 and 2015

- Supported Office for Social Enterprise consultations in rural and northern regions

APPENDIX B: OUTCOMES MAPS

OBJECTIVES

To deepen capacity building work & test new approaches to building skills and supports for rural SE development

To build relationships & partnerships among rural SE capacity builders to support long term development

STRATEGIES

Growing rural engagement & networks in the Social Enterprise Sector in Ontario

Contributing to the resilience & resource development capacity of rural nonprofits

PRE-CONDITIONS FOR SUCCESS

Solid Theory of Change, planning and project management for RSEC

Strong collaborative relationships & processes among project partners

Three year funding through Ontario Trillium Foundation

Credible, active & engaged regional & provincial partners

OUTCOMES

Strengthened relationships & linkages with OMAFRA policy makers

Regional networks & systems for support for rural SE assessed

More rural regions linked through RSEC

Increased documentation of rural social enterprises in RSEC regions

Opportunities to share experience & effective practices in rural SE

Stronger connections & networking among rural SE

Enhanced profile for regional & provincial partners in provincial SE sector intermediaries & champions

New funding leveraged through OMAFRA for rural SE policy research

Regional RSEC partners invest in local SE coaching expertise

Deeper commitment of RSEC partners to convene around rural SE

Access to new funding for regional rural SE intermediary work

Greater understanding of SE & commitment of regional funders (including municipality & county stakeholders)

New resources, capacity & knowledge to provide SE business counselling in rural regions

Increased knowledge of rural SE issues among intermediaries & stakeholders

Plan for investment in northern SE completed & resourced

New opportunities to promote rural SE at key sector conferences

Sectoral social enterprise programs launched (e.g. arts and cultural sector)

Social enterprises are successfully developing

Capacity for rural nonprofits to engage strategically in SE is enhanced

Expanding roles & work of regional intermediaries in supporting rural & northern SE development

More links to & potential for future collaborations in rural SE sector development

OUTCOMES MAPS – continued

OBJECTIVE

To support and engage emerging practitioners & post-secondary institutions
in rural SE capacity building & research

STRATEGIES

Growing rural engagement & networks in the
Social Enterprise Sector in Ontario

Promoting knowledge transfer & research on SE
with a rural focus

PRE-CONDITIONS FOR SUCCESS

Solid Theory of
Change, planning and
project management
for RSEC

Strong collaborative
relationships &
processes among
project partners

Three year funding
through Ontario
Trillium
Foundation

Credible, active
& engaged
regional & provincial
partners

OUTCOMES

SE practitioners identified & convened
across RSEC regions

New & enhanced partnerships with Georgian College
& University of Guelph around rural SE

Rural SE
practitioners Institutes
piloted in
two regions

New resources, capacity
& knowledge to provide
community based SE business
counselling in rural regions

Opportunities for
post secondary students
to do rural
SE research

Models for integration of rural
SE education & knowledge
creation into post secondary
institutions tested

Enhanced access to, and investment in
local SE coaching & consulting

New post secondary curricula & resource
materials on rural SE policy & practice

Students engaged in rural SE
case study development

Rural SE topics & issues are integrated into post secondary
curricula (U of Guelph, Trent U, and Georgian College)

Students & emerging practitioners are
mentored & engaged in peer learning

**More informed coaching & consulting
for rural SE development in regions**

**New research into rural SE
policy & practice**

**More support for teaching rural SE
at post secondary institutions**

**New opportunities to promote rural SE at
key sector conferences**

**Students, professors and practitioners have increased
knowledge & understanding of rural SE issues**