

Social Economy Charter

*To guide and inspire the work of
the Ontario Social Economy Roundtable (OSER)
&
for all those working to build the movement.*

CHARTER CONSULTATIONS PACKAGE

- A guide for charter conversations

(Sep 22 Note: This document is currently in draft form. It will be finalized over the next few days)

This package is for anyone wishing to facilitate a charter conversation. We encourage anyone who is interested in or involved in the social economy to facilitate these conversations with your existing local or regional networks. As outlined in the overall Charter Plan, these conversations are part of the province-wide consultations happening from September 19th – November 30th 2014. These consultations will be hosted by individuals and organizations across Ontario. Most will be facilitated in-person, though some will be through webinars and teleconferences.

The package includes four sections:

Section One: Purpose of the Charter

- a. What is a charter?
- b. *Why is a charter needed?*
- c. *What will a charter accomplish?*
- d. *What is the purpose of a Social Economy Charter*

Section Two: Charter Development Plan

Section Three: Facilitation Guide

- a. how to host a conversation?
- b. what are the questions?
- c. how many people are ideal?
- d. timeline & itinerary for a charter consultation?
- e. sharing the results of your charter consultation

Section Four: Background Material

- a. Description of OSER
- b. Glossary of Terms
- c. Invitation to Charter Consultation template

Section One: Purpose of the Charter

What is a charter?

A charter is a broad set of principles and guidelines that express the vision and shared values of stakeholders.

It is a living document, with the opportunity to revise and evolve over time.

A charter is not a strategic plan, it does not state how these principles will be achieved. It is akin to the North Star and intended to guide all those who self-identify as being part of the movement.

A charter is a code of practice, a declaration and a definition of who is part of the tribe.

Why is it needed?

There comes a time when the collective work of a handful of individuals and organizations breaks through and attracts the interest of powerful allies. When a movement is diffuse, with no central leadership or authority, it is important for all of the actors to share a common language and to craft the scope of what it means to be part of the movement.

A charter of principles provides this scope, permitting the handful of individuals and organizations to provide guidance to the increasing number of allies. It prevents the shared purpose from becoming diluted.

What will it accomplish?

A charter allows for a loose network to coordinate their efforts toward a shared purpose. It increases the trust within the network as individuals and organizations can have faith that their peers are conducting their affairs in a way that furthers the shared purpose. It also allows for constructive conversations between peers if and when conflict arises.

A charter provides a baseline understanding of the social economy movement in Ontario, responding to the increasing interest of various and diverse stakeholders of the sector. It will foster understanding, education and partnerships in the sector and help to prioritize issues, opportunities and collaborative action.

What is the purpose of a Social Economy Charter

The Ontario Social Economy Roundtable (OSER) has operated as open, informal network for sharing information and convening organizations and individuals to take an active leadership role in shaping Ontario's social economy and speaking cohesively as a sector.

The process of developing the Social Economy Charter, as well as the final document, will be valuable vehicles to build the social economy movement by bring together increasing numbers of people and organizations from all parts of the social economy, while also increasing our cohesion and effectiveness. It will ensure that those contemplating allying themselves with OSER and the social economy movement, as well as those who are currently involved, are clear about what OSER has to offer its stakeholders, the shared purpose and values, and the expectations and accountability.

While acknowledging our differences, the charter allows us to move forward by focussing on what we agree on.

Section Two: Charter Development

Announcement: Sep 17 - 30

- At Ontario Nonprofit Network conference
- Through OSER member networks

Charter Consultation: Oct 1 - Nov 30

- Consultations are hosted by individuals and organizations across Ontario
- Open data software tools (eg google docs, smartsheet) are used to instantly capture, publish and share the results of these consultations

Organizing Data: Dec 1 - Jan 15

- The results of the consultations are sorted and aggregated into a format which will allow the drafting team to interpret and analyze

Drafting: Jan 16 - Apr 15

- Team of 5-10 individuals are tasked with leading the development and articulation of the set of charter principles.
- Process is open & transparent
- The final draft of the Charter is circulated to all of the contributors to date, and released in an open-call to solicit feedback from others

Endorsement & Adoption: May 1 onwards

- Development of a Charter endorsement and adoption package that individuals and organizations can utilize to officially endorse the Charter, educate their networks about the Charter and demonstrate their endorsement

Section Three: Facilitation Guide

Charters are only as effective as the process by which they are created.

Therefore, a charter to guide the collective work of the social economy should seek to build trust between diverse stakeholders, including both those who have championed 'social' for decades and those who are 'new' to the space.

To accomplish this, we have agreed to these following design principles:

- being open and transparent
- being inclusive
- being respectful of the diversity and realities of people participating
- being engaging and participatory, and the inverse of this is reducing the barriers to participate

As a HOST for a charter consultation, it is expected that you agree to these principles.

The following are the steps and tips on how to host a productive & successful consultation.

1. Preparation

- a. Notify the Social Economy Charter team that you will be hosting a conversation.
- b. Decide whether your conversation will be facilitated in-person or through a webinar.
- c. Set a date & location.
- d. Identify and recruit someone to be the note-taker, you will be focused on facilitating, and contributing, to the conversation and will need help in capturing what is being discussed.
- e. Create a simple sign-up sheet, asking for name, contact info and permission for the Social Economy Charter organizers to contact the person for further input. We encourage you to use an excel file or google doc to make it easy to upload this information.

2. Invitation

- a. Invite your colleagues and friends to participate in a charter conversation. You can use and adapt the template provided.
- b. Be fun & engaging, add a statement about why this is important to you.
- c. 2hrs is the ideal length, though you can go longer and it's possible that with only 90 minutes you could generate some good input.
- d. 5-15 people is probably ideal to generate rich discussion, but it's more about the interest of whoever is involved and however many people you are able to bring together to focus on these questions.

3. Facilitate the Conversation

- a. Prepare the schedule & have it posted, you could follow this template or adapt to meet your needs:
 - Upon arrival – participants fill out contact sheet & accept/decline permission for Social Economy Charter organizers to contact them.
 - 10 minutes – welcome & introductions. Go further than name & organization, ask guests to share their experience with the 'social economy'.
 - 10 minutes – overview of the consultation, agenda for today's discussion and questions
 - 30 minutes – discussion on the social economy
 - 30 minutes – digging deeper into the principles
 - 30 minutes – working together

- 10 minutes – closing thoughts
- b. Questions to Guide your Discussion
 - i. Social Economy Discussion Questions
 - 1. What does the **social economy mean to you?**
 - 2. Who is part of the social economy? Who is not part of the social economy and why? What are the minimum specifications for being involved or excluded?
 - 3. What impact & results does the social economy need to achieve?
 - ii. Digging Deeper into the Values & Principles
 - 1. What are the top three values for a social economy?
 - 2. Describe in detail what these values look like when they are being practiced?
 - a. For example, if 'values local economies' is a core principle for you, what does a local economy look like?
 - iii. Working Together
 - 1. What values would a network (for example, the Ontario Social Economy Roundtable) need to have to exhibit the values you identified in the earlier conversation?
 - 2. How would it act? What will its reputation be? What will success look like?
 - 3. How would you like to be involved in this network?
- c. At the end of your discussion, thank all of the participants and inform them that you will be sending the notes from this discussion to the Social Economy Charter organizers. The organizers will contact everyone who gave them permission to contact to update them on the progress and invite more feedback.

4. Share your Results

- a. Save your notes & participant list (either in a word document or google document)
- b. Fill out this [simple feedback form](#), be sure to upload your documents!
- c. Follow the progress of other groups by [visiting this live document](#).

Section Four: Background Material

Description of OSER

The Ontario Social Economy Roundtable (OSER) operates as an open, informal network focussed on Ontario's social economy. To this point it has described its goals as being to:

- **Facilitate connections** among organizations working in the social economy sector.
- **Improve understanding** of the social economy sector, its needs and its opportunities.
- **Grow awareness** of the social economy among Ontarians and among decision-makers.
- **Increase financial resources** available to the social economy sector.
- **Encourage an enabling regulatory environment** to facilitate the work of the social economy sector.

For more information about how OSER works and the organizations it is involved with please see the OSER page on SEOntario.org seontario.org/home/about-social-enterprise-ontario/strengthening-the-social-economy-in-ontario/

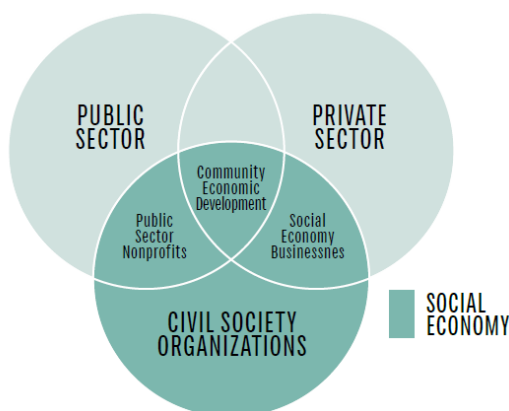
Glossary of 3 key terms

Social Economy

What is the Social Economy?

(from *Inspiring Innovation*ⁱ)

Canada's economy is made up of three distinct, yet overlapping, sectors: the private sector, the public sector including all levels of government, and civil society.ⁱⁱ The latter grouping, alternatively called the nonprofit, community benefit, or voluntary sector, has been increasingly referred to as the *social economy*.



Understanding the Social Economy Diagram. Adapted from "An Interactive View of the Social Economy," by Jack Quarter and Laurie Mook, 2010, ANSERJ Canadian Journal of Nonprofit and Social Economy Research, vol. 1, no. 1, Quarter and Mook 2010.

There is no overarching consensus on what comprises the social economy in Canada, the movement is in development and the language reflects this. The relevant description as it relates to this report describes the social economy as comprised of "cooperatives, nonprofit societies, civil society associations, credit unions, and social enterprises that are working to combine social objectives with economic ones,".ⁱⁱⁱ This highlights that

the social economy contains for-profit and nonprofit organizations, which seek to incorporate both economic and social values in their work.^{iv}

A conceptual description is that the “Social Economy is a bridging concept for organizations that have social objectives central to their mission and practice, and either have explicit economic objectives or generate some economic value through the services they provide and purchases they undertake”.^v

For Quebec “the social economy includes a wide variety of enterprises and organizations that produce goods and services with the expressed goal of maximizing social, environmental or cultural impact. A broad definition of the social (solidarity) economy includes community economic development institutions, solidarity finance and other collectively owned economic instruments”

- Nancy Neamtan *Grassroots response to the global crisis: The social economy*, CERIUM, 2010, PPT

Intermediary organizations with missions to support social enterprise usually see themselves as part of the social economy.

Social Enterprise

- Social enterprises are organizations that produce goods and services for the market economy and that manage their operations and redirect their surpluses to achieve social and environmental goals. Social enterprise activity gives public benefit organizations an alternate source of funds to better fulfill their mandates. It is a way for the nonprofit sector to be more sustainable and continue to act as a solutions provider for communities across Ontario.
 - SEontario.org/what-is-social-enterprise/
- A social enterprise is an organization that uses business strategies to maximise its social or environmental impact.
 - Government of Ontario, [Impact – A Social Enterprise Strategy for Ontario 2013](#)
- A nonprofit or for-profit involved in the production and sales of goods and services for the blended purpose of generating income and achieving social, cultural or environmental goals or
An organization or business that has 2 goals: to achieve social and environmental outcomes and to generate revenue
 - Pillar Nonprofit Network, [What is Social Enterprise? \(video\)](#)

Social Entrepreneur

- A social entrepreneur is someone who works in an entrepreneurial manner, but for public or social benefit, rather than to make money.
 - Ontario School for Social Entrepreneurs www.the-sse.org/what-is-social-enterprise-
- A social entrepreneur is someone who recognizes a social problem and uses entrepreneurial principles to organize, create, and manage a venture to make social change (a social venture).
 - Canadian Social Entrepreneurship Foundation csef.ca/what_is_a_social_entrepreneur.php

Paul Chamberlain, Kate Daly, Peter Elson, Joanna Flatt, Peter Hall and Matthew Thompson **Inspiring Innovation: The Size Scope and Socio-economic Impact of Social Enterprise in Ontario**, Canadian CED Network, Simon Fraser University and the Institute for Nonprofit Studies, Mount Royal University, 2013; Institute for Nonprofit Studies, Mount Royal University, 2013

ⁱⁱ Sarah Amyot, Rupert Downing, and Crystal Tremblay, *Public Policy for the Social Economy: Building a People-centred Economy in Canada*, Public Policy Paper Series no. 3 (Victoria: Canadian Social Economy Hub at the University of Victoria, 2010).

ⁱⁱⁱ Marilyn Struthers, "Of Starlings and Social Change: Funding the Nonprofit Sector in Canada," *The Philanthropist* 24, no. 1 (2012): 266-267.

^{iv} Sarah Amyot, Rupert Downing, and Crystal Tremblay, *Public Policy for the Social Economy: Building a People-centred Economy in Canada*, Public Policy Paper Series no. 3 (Victoria: Canadian Social Economy Hub at the University of Victoria, 2010).

^v Jack Quarter, Laurie Mook, Ann Armstrong, *Understanding the Social Economy: A Canadian Perspective*, Toronto: University of Toronto Press, 2009

Invitation to Charter Consultation template



Hear the Buzz?

You're invited to a
**Social Economy Charter
Conversation**

What ? A *Social Economy Charter Conversation* is a time for you to share your ideas about what the social economy means to you, the impacts you want it to have and the values that should guide it.

What's this really all about? These conversations are part of an Ontario-wide consultation to create a **Social Economy Charter** to guide and inspire the work of the Ontario Social Economy Roundtable (OSER) and for all those working to build the movement.

What is a Social Economy Charter?

A set of principles that expresses the vision and shared values of social economy organizations.

Why do I need to participate?

By being part of this conversation you will help the **Social Economy Charter** to reflect the values and principles that you, your organization and your community believes are important as this critical work moves forward in Ontario. And besides, it's a great chance to chat with your friends and colleagues!

Follow these links to find out more about [OSER](#) and to learn more about [the social economy charter](#), why it's needed and what it can accomplish.

Please RSVP to *(your email address)* **by** *(a date about a week before the event)*

I really hope you can join us.