TSES
Tasmanian
Social Enterprise
Study

Tasmanian Social Enterprise Study

Baseline Study Report

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About the Tasmanian Social Enterprise Study

Social enterprises in Tasmania have the potential to generate both social inclusion and economic development outcomes. In order to support the development of this important sector, it is necessary to understand the characteristics of currently operating social enterprises.

The Tasmanian Social Enterprise Study has been developed in response: as the first ever study of social enterprise in Tasmania. This preliminary study aims to provide a baseline snapshot of the sector and a launching point for future work.

Research for this report was conducted between November 2010 and March 2011. The project was initiated by Women Tasmania and structured as a partnership between the Tasmanian Government and the University of Tasmania's Institute for Regional Development, with the guidance of an industry-based Advisory Group bringing together a number of people and organisations in Tasmania with extensive knowledge of social enterprise.

The study forms part of the Socio-Economic Innovation research flagship of the Institute for Regional Development and builds on previous work undertaken on social enterprise in Australia by Social Traders and the Australian Centre for Philanthropy and Non-Profit Studies at the Queensland University of Technology, in the Finding Australia's Social Enterprise Sector (FASES) project (Barraket *et al* 2010).

The Tasmanian Social Enterprise Study has benefitted from the active collaboration and knowledge sharing of a large number of organisations, especially the 111 that took the time to provide thoughtful responses to this first survey of the sector. The results tell us a great many things of interest, and will serve us well in planning future work.

Summary of Key Findings

The Tasmanian Social Enterprise Study drew respondents from a range of industries and social sectors across the state. Social enterprises were defined by their *mission to generate social and community benefit*, and using *trading activities to fulfil that mission*. About 91% of organisations responding to the survey *self-identified as social enterprises*, while others met the broad definition without adopting the label. The 111 social enterprises responding to the survey provided rich data on the sector, demonstrating a genuine commitment to their missions as well as a clear understanding of their individual challenges and support needs.

The survey revealed that the largest proportion of Tasmanian social enterprises work in the Education and Training industry: 56%, with the majority focused on adult and community education. The next largest industry grouping is Arts and Recreation services (44%), followed by Social Assistance Services (31%). Many social enterprises classify their work across multiple industries. The social enterprise sector in Tasmania includes all major industry classifications with the exception of mining.

Social enterprises are found across the state: of the 29 local government areas in Tasmania, all but two had social enterprises that contributed to this study. Many Tasmanian social enterprises work in multiple locations. Thus, 183 distinct social enterprise locations were identified. The majority of these locations are directly providing services to clients/the community, and some organisations explicitly noted that they provide services statewide. Social enterprises work to address issues locally, regionally, statewide as well as at national and sometimes international levels.

Tasmanian social enterprises have adopted a broad range of legal structures; some are structured as incorporated associations (40%), some as sole traders or other traditionally private-sector business forms (22%), some as companies limited by guarantee (6%) or co-operatives (5%). Other legal forms were represented as well.

As regards their trading activity, 91% of respondents indicate that they conduct trading activity, and these trading activities range from 'providing services for a fee' (74%) to retail, production, and other forms of trade. Sixty-eight percent derived more than 50% of their income from trade. Tasmanian social enterprises trade in a range of markets from local and regional to international, with almost 20% indicating a geographical focus

on international markets. As in the national FASES study, Tasmanian social enterprises focus heavily on local markets (51%), yet Tasmanian enterprises are more likely than their counterparts in other states to be working in markets beyond their local area.

Social enterprise is not a new sector, and the Tasmanian results reinforce this: with 57% of Tasmanian social enterprises having been in operation for more than ten years and some well over fifty years. This represents a valuable resource: a large pool of knowledge, experience and understanding of the sector. Meanwhile, 10% of Tasmanian social enterprises are less than two years old, indicating a continued interest in entering and growing the sector.

Collectively, Tasmanian social enterprises employ individuals with a broad range of skills for management, administrative and operational roles. About half, or 54% of Tasmanian social enterprises have full-time paid employees, and about 60% have part-time paid employees. The number of paid workers varies enormously, from a single paid employee to several hundred. Volunteers also play an important role, with 57% of Tasmanian social enterprises relying on volunteers, and an average of 23 volunteer workers per social enterprise.

Social enterprises work with diverse groups across the community: including young people (54%), people with disabilities (51%), families (50%) and many others. Many social enterprises work across multiple groups and serve diverse communities. The broad reach of many social enterprises is not easily predicted by the social enterprise's sector or industry of operation.

About three-quarters (74%) of social enterprises exist to provide a direct public or community benefit; others provide benefits to a larger not-for-profit organisation or to their member base.   When asked about their social purpose, over 70% indicated that their aim is to *create opportunities for people to participate in their community.* Social enterprises also have a strong innovation focus, with over 50% indicating that their aim is to *develop solutions to social, cultural, economic or environmental problems* (compared with 26% of social enterprises nationally).

Social enterprises are also often participatory spaces, and Tasmanian social enterprises have a particularly strong mission around community participation (71% of respondents, compared with 44% nationally). Nearly two-thirds (63%) of social enterprises in Tasmania agreed or

strongly agreed that their beneficiaries are actively involved in their organisation, and 66% agreed or strongly agreed that their beneficiaries are informally involved in decision making. Over half (55%) stated that their beneficiaries are actively involved in program and/or service delivery.

The impacts of Tasmanian social enterprises have been documented to date primarily through informal evaluation methods, although a few formal evaluations have been conducted. There appears to be some good focus on evaluation processes and reflective practice among Tasmanian social enterprises.

As regards their aims for the future, Tasmanian social enterprises demonstrate strong growth aspirations. In the next three years, 76% of social enterprises aim to expand the range of products and services they offer, 62% aim to increase the income they derive from trade, and 44% aim to expand their geographic reach. At the same time, these social enterprises understand the need to ensure their sustainability and balance the provision of goods and services with the mission of the organisation. Not just profits are at stake; there is a great deal of emotional energy invested by participants and workers.

Tasmanian social enterprises also provided thoughtful reflections on the key challenges and support needs for the sector. A range of factors impact on the set up, sustainability and growth of the social enterprise sector in Tasmania. These include lack of suitable funding to accommodate the risks and complexities of social enterprises through the phases of enterprise set up, development and expansion. The financial and personal risk associated with setting up a social enterprise impacts on individuals and organisations, as does the availability of skilled workers and volunteers, and a lack of access to affordable and appropriate support: 'Finding people who can help you'. Resources exist, but new social entrepreneurs often do not know where they can go for help.

Another key challenge is the need for greater public awareness and recognition of social enterprises in the community and marketplace. Some social enterprises reported attitudinal barriers which impacted them directly. Developing good business know how, financial models, governance structures and management habits all rated as challenges, as did the cost and accessibility of locations from which to operate.
In response, social enterprises indicated five key areas that can be targeted to expand and grow the sector:

- Better financial assistance for social enterprise;
- Raising community awareness of social enterprise and its contributions;
- Stronger collaborative relationships with government, not-for-profit and private sectors;
- Learning, knowledge-sharing and hands-on help; and
- An enabling legal and regulatory environment.

These findings led to the following recommendations:

- *Recommendation One: For the Tasmanian Government to provide a more diverse range of funding options appropriate for Tasmanian social enterprises of various sizes and growth stages, potentially including small-scale seeding grants and no-interest loan options.*
- *Recommendation Two: For the Tasmanian Government to financially support an ongoing program that profiles, promotes, educates and informs about social enterprise, in order to develop a deeper awareness of the role of social enterprise and facilitate collaborative opportunities with the sector.*
- *Recommendation Three: To explore mechanisms for increased private and philanthropic investment in social enterprise, to increase social enterprises' access to capital and/or to lower key costs such as accommodation and insurance.*
- *Recommendation Four: To establish a central web-based hub to provide information about social enterprise in Tasmania, networking opportunities for Tasmanian social entrepreneurs, and links to learning resources, networks and support organisations in Tasmania, interstate and overseas.*
- *Recommendation Five: To pilot a targeted development program for Tasmanian social enterprises, responding to the identified need for 'hands-on assistance' and linkages particularly in the early stages of starting a social enterprise.*

The findings from this report clearly indicate the exciting breadth, depth and potential of the social enterprise sector in Tasmania. At the same time, survey findings highlight that the current resources provided to social enterprises by government and other organisations do not adequately support the needs and growth of this sector in Tasmania. The overall message from this work is that there are exciting opportunities to build on what is already a rich, diverse and committed sector that benefits both the social and economic life of the state and its people.

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1. Introduction: Social Enterprise as an Emerging Sector

For many years our understanding of the economy has been a three-fold typology of the government sector, the private sector, and a 'third' sector of non-governmental, not-for-profit organisations.

For an equally long time, however, there have been organisational arrangements that do not fit this three-fold typology. Today's burgeoning interest in social enterprise in policy and practice recognises that interesting things are happening at the boundaries of for-profit enterprise and not-for-profit community-benefit activity.

Growing national and international interest in social enterprise (e.g. Talbot *et al* 2002, Robinson et al 2008, Social Enterprise Coalition 2009, DEEWR 2010) and the related areas of social business (see e.g. Yunus 2010), the 'fourth sector' (Sabeti 2009) and social innovation, have brought the potential of new and hybrid organisational forms to the fore. Some are 'new' and some are simply newly on the radar, but all offer opportunities to explore ways to leverage enterprising activity for community benefit.

Defining Social Enterprise

Defining social enterprise is a vexed question. Other studies have found that legal forms have not been a good predictor of social enterprise status (see discussion in Chapters 3 and 4 below). Thus, simply identifying the legal form of an organisation does not tell us whether or not it is likely to be a social enterprise. Nor has s*elf-definition* (whether or not an organisation considers itself a social enterprise) been a good predictor of social enterprise status, though a number of studies have used self-definition to avoid excluding potential social enterprises on the basis of legal form.

The definition of 'social enterprise' for the purposes of this study follows the broad parameters outlined in the FASES study, which defines social enterprises as organisations that:
- Are led by an economic, social, cultural, or environmental mission consistent with a public or community benefit;
- Trade to fulfill their mission (where trade may be monetary or non-monetary), and derive a substantial portion of their income from trade[1]; and

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[1] For the purposes of this study, 'a substantial proportion' of income will not be explicitly defined.

- Reinvest the majority of their profit/surplus in the fulfillment of their mission. (Barraket et al 2010:16)

A point of difference from the national study is that organisations which *self-identify* as social enterprises, are included in the study even if they do not meet all of the above criteria. This responds to the findings of consultations with the sector undertaken as part of the FASES study found that: *'the consensus seems to be that all mission-led organisations that trade should be considered social enterprises'*. Equally, a recent social enterprise research forum in Brisbane (November 2010) concluded that definitional issues around the sector are unlikely to be resolved, and that dwelling on definitional issues is becoming counter-productive. The consensus seems to be to keep a broad definition of social enterprise.

Overall, while definitional consistency is important for comparability with the findings of the national study, it is equally intended that the present study contribute to the development of a definition of social enterprise that is particularly suited to the Tasmanian context. We wish to ensure that this baseline study gains the most complete picture possible of the sector in Tasmania.

2. Methodology

The Tasmanian Social Enterprise Study was designed to provide a baseline snapshot of the sector in the Tasmanian context. The aims of this study are to:

- Identify, as a baseline stocktake, the size and characteristics of the social enterprise sector in Tasmania; and
- Engage with Tasmanian social enterprises to reflect on identity, mission, impacts, needs, barriers to start-up and growth and aspirations, to inform further research and support for the sector.

This research thus set out to collectively *define* and *make visible* this sector, so as to be in a position to work together to build capability over the long term.

The research was commissioned by the Tasmanian Government with a project Steering Committee comprised of representatives of Women Tasmania, the Social Inclusion Unit, and the Department of Economic Development, Tourism and the Arts. The methodology was designed by the University of Tasmania's Institute for Regional Development in close consultation with this Steering Committee. The research also benefitted greatly from the active engagement and advice of an industry-based Advisory Group and a lead Research Associate from the social enterprise sector. The project also consciously built upon groundbreaking work by the Queensland University of Technology (QUT) Centre for Philanthropy and Non-Profit Studies, which in collaboration with Social Traders conducted the first-ever Australian national survey of social enterprises in 2010. This project replicated some of the survey questions from the national survey.

This project uses a Knowledge Partnering methodology. The Institute for Regional Development's Knowledge Partnering methodology is a collaborative research methodology built on the principle of working together to ask and answer questions of common interest. This approach is particularly suited to conducting collaborative, applied research to address regional development knowledge gaps.

The project started from the question: *What does Tasmania's social enterprise sector look like now?* This was a question of interest to those within the sector itself, as well as to the university and to key agencies interested to support the growth and development of the sector.

This question included within it a desire for more information on:

1) the number and profile of Tasmanian social enterprises: geographic location, size, age, type of organisation, structure and industry sectors in which they operate;

2) the nature of their (diverse) organisational missions and their social and economic contributions; and

3) key impact areas, available evaluation evidence to date, and information on the sector's support and development needs

It was also informed by a desire to commence a long-term conversation with social enterprises in Tasmania around:

1) The visibility of social enterprise as an identifiable 'sector';

2) Needs and aspirations of social enterprises individually and collectively;

3) Barriers to enterprise startup and growth; and

4) Reflections and lessons learned from work to date.

The study was defined in three parts: first, a process of **identifying social enterprises** in Tasmania, including a desktop analysis, an extensive networked promotion strategy, and the establishment of a project blog; next the conduct of an **on-line survey,** which was open over the period of one month from early February to early March 2011, and finally, the gathering some preliminary **profiles and stories** from Tasmanian social enterprises.

Identification of Social Enterprises

The identification of social enterprises was a complex task as no database exists, and many 'social enterprises' fitting the definition do not identify as such. The first stage of the methodology was thus to identify social enterprises in Tasmania, using a combination of 'top down' and 'bottom up' approaches[2] to mobilise our collective knowledge resources in order to identify social enterprises in Tasmania.

The 'top down approach' is based on a desktop analysis of available data. These included:

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[2] See Barraket et al 2010: 10-12 for a description of these approaches to identifying social enterprises and how they have been used in other studies internationally.

- National databases of social enterprise intermediaries, such as Social Traders, Australian Disability Enterprises, and web search of not-for-profit trading enterprises;
- Review of ASIC and Department of Justice Databases of companies limited by guarantee, cooperatives, and associations to identify potential social enterprises and their peak organisations where relevant.

By identifying the sectors of activity and peak organisations of the sectors where potential social enterprises might most likely be found, the top-down approach provided a channel for the strategic distribution of information about the project through network 'nodes'.

The 'bottom-up' approach is based on mobilising local knowledge and statewide networks within Tasmania to identify social enterprises and to encourage a high level of engagement with the project. This approach was particularly relevant for the Tasmanian context and involved:
- Conversations with professionals across relevant sectors to identify known 'social enterprises' that self-identify as such, and/or fit the broad FASES definition;
- The development of a project blog providing articles, links, and updates on the project;
- A visual 'branding' for the Tasmanian Social Enterprise Project to increase awareness and visibility of the project;
- Communication materials and an engagement strategy designed to raise awareness of the project and encourage practitioners across various sectors to circulate information about the project through their professional networks and publicise it via newsletters, listservs and websites;
- Press releases, media and public appearances.

While the absence of a known 'population' of Tasmanian social enterprises made it impossible to select a rigorous representative sample, the combination of top-down and bottom-up methods enabled the study to achieve an effective coverage of Tasmanian social enterprises by industry sector, geographic location and enterprise size.

Online Survey of Social Enterprises

Three key questions were employed to help organisations self-select into the project and the survey:

- *Is your organisation led by a mission to create public or community benefits?* and
- *Does your organisation trade regularly to fulfill that mission?*

(And/or)

- *Does your organisation consider itself to be a social enterprise?*

Project communications used these 'screening questions' and directed prospective participants to the online project blog. From there, those organisations that considered themselves eligible were invited to self-select into the survey by clicking the link to the online survey facility. Prospective participants were also offered the option of completing a hard-copy survey if desired.

The survey was accompanied by a detailed information sheet explaining the purposes, content and conduct of the study (see Appendix 1, Survey Instrument). The survey asked for one response per participating social enterprise. The was limited to twenty questions and was expected to take about 15-20 minutes to complete.

The survey instrument adopted some questions from the national FASES survey, adapted others, and added in a few original questions of particular interest to the project team. The Tasmanian survey was limited to twenty questions (shorter and sharper to encourage high response rates). The project team was rewarded with a high proportion of thoughtful qualitative responses as well as good quality data overall.

The aim was to achieve 100 completed surveys for this initial project. The target was exceeded, with 108 online surveys were completed, and 3 hard-copy surveys, to a total of 111 usable responses.[3]

Social enterprises responding to the survey were also asked to indicate whether or not they would like for their organisational details to be included in the database of Tasmanian social enterprises. Those organisations which gave permission for their details to be included are listed in Appendix 3.

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[3] Five online surveys were commenced but the amount of information given was not usable; these five surveys have not been included in the analysis.

An important aspect of the research methodology involves engaging the sector itself in discussions about its profile and needs. The Tasmanian Social Enterprise Blog was the initial tool selected to create a central spot to encourage reflection and conversation within the sector. The blog received over a thousand hits over the project period. While it did not attract a large amount of online discussion, the blog did serve as an important tool for raising awareness about the project and providing a central point with links to other social enterprise sites. The blog is ongoing, and it is hoped that as interest in the project grows, it may continue to serve as a central information point and as a discussion portal.

As discovered in other recent work (such as the *Australian Social Enterprise Stories* project recently conducted by the Centre for Social Impact and the Parramatta City Council[4]), sharing stories and narratives is a key strategy for building capability in this sector. Some of the social enterprises involved in this preliminary study indicated that they were open to sharing their story with others. This seemed a valuable opportunity to start the process of storytelling within the sector. A small selection of social enterprise profiles is therefore included in this report (see Chapter 9). It is hoped that this will provide an indication of both the diversity of the sector, and the benefits of sharing stories and working together as knowledge partners to ask and answer questions together.

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[4] See Kernot and McNeill 2011.

3. Social Enterprise in Tasmania: A Starting-Point

This study started from the observation that the 'Social Enterprise sector' in Tasmania was a relatively unknown quantity. Yet the potential significance of social enterprise was increasingly becoming apparent: social enterprise, crossing traditional boundaries between 'non-profit' and 'business', is as a creative and potentially highly sustainable approach to tackling social and economic disadvantage. It was necessary therefore, to work together to find ways to make a largely 'invisible' sector visible.

A Policy Imperative

The Tasmanian Social Inclusion Strategy specifically refers to social enterprises as a key strategy to address social and economic exclusion in Tasmania (*Strategy 5, "Social Enterprises: A Hand Up Not a Hand Out").* The Strategy document observes that:

> 'The extraordinary dynamism of the social enterprise movement is already in Tasmania from local Farmers Markets through to disability businesses such as Self Help Workplace and microcredit operations such as the No Interest Loan Scheme; and from regional community arts projects through to agencies such as Youth Futures linking at-risk young people into job markets.' (Adams 2009:50)

In its response to Professor Adams's report, the Tasmanian Government subsequently committed $3 million towards a Social Enterprise Loan Fund.

The growing level of policy interest in social enterprise thus highlighted the need to develop a clear, research-based picture of what social enterprise looks like in Tasmania, the nature of its contribution, and the aspirations and support needs within the sector.

Previous Research

The national Finding Australia's Social Enterprise Study (FASES) is the only piece of available primary research on the sector in Tasmania. Yet this national survey with 395 responses from social enterprises, received only three responses from Tasmania.

Despite this, local knowledge highlighted the presence of a number of social enterprises in Tasmania which clearly 'fit the definition'. The first stage of the study was therefore to work out a strategy for identifying social

enterprises in Tasmania, in light of the definitional issues outlined in the previous chapter.

When approaching the task of identifying social enterprises in Tasmania, the Steering Committee recognised that social enterprises may take a range of legal forms. In addition, they may be organisations in their own right, or subsidiary ventures of larger organisations. It was therefore difficult to know where to start.   Referring to the findings of the national FASES study of social enterprises, we saw that the most common legal forms for social enterprises nationally were **incorporated associations, companies limited by guarantee**, and **cooperatives** (Barraket et al 2010:26).

Incorporated associations are corporate bodies that have a charitable or community purpose as defined by the *Associations Incorporation Act 1964;* the definition explicitly excludes groups 'formed for the purposes of trading or securing pecuniary profit for … members'. Nevertheless, in the national study, over half of social enterprises were incorporated associations (51.6%) (Barraket et al 2010:26). These organisations were conducting regular trading activities, but met the 'not-for-profit' legal definition by reinvesting their profits back into the fulfillment of their mission, rather than distributing them to members.

Companies limited by guarantee are incorporated companies registered under the *Corporations Act 2001* in which the company is owned by members whose liability is limited to the amount the members agree to contribute if the company is wound up. In the national study, nearly a quarter (24.5%) of social enterprises responding to the survey were companies limited by guarantee. (Barraket et al 2010:26).

Cooperatives are organisations registered under the *Cooperatives Act 1999*, either as trading or non-trading cooperatives. In the national study of social enterprises, a little over 5% of social enterprises were structured as co-operatives. (Barraket et al 2010:26).

A 'Top Down' Approach to Identifying Potential Tasmanian Social Enterprises

Thus, the research team decided to identify how many organisations in Tasmania fit into these three legal forms.   We recognised that only a proportion of these would actually fit the definition of social enterprise, and/or self-identify as such; equally, we recognised that some social enterprises would have different legal forms; this had also been the case in the national study. Nevertheless, we felt that having an overall picture of

incorporated associations, companies limited by guarantee and co-operatives in Tasmania would allow us to contextualise our survey findings within this larger population of 'potential' social enterprises.

In Tasmania, data provided by the Department of Justice indicated that as of 31 August 2010, there were **3549 incorporated associations** registered in Tasmania. These associations include a range of clubs (sporting clubs, service clubs, special-interest clubs), social service bodies (aged care, child care, respite care, counseling, community centres, etc.), health bodies (disease foundations, health services, hospital auxiliaries), educational bodies (school associations, training groups, adult learning groups, etc.), environmental services organisations (e.g. Landcare groups, wildlife rescue), arts and cultural organisations (e.g. art/drama/music groups, language and culture societies), church and religious organisations, business, industry and professional associations, market associations, and other local groups such as show societies and progress associations.

The number of **companies limited by guarantee** in Tasmania is much smaller – only **200** – however, these, by nature of their legal form, are more likely than incorporated associations to be both trading and seeking to create a community benefit. A list of the 200 companies limited by guarantee provided by the Australian Securities and Investment Commission (ASIC) demonstrates that these companies cover many of the same kinds of areas of potential public and community benefit as the list of incorporated associations: a number of clubs, a few social services and health bodies, and a larger number of educational, professional and business associations across a range of industries from agriculture to health care, as well as religious organisations, cultural organisations and (the main difference) a small number of financial organisations. Environmental services organisations were not, however, represented among Tasmanian companies limited by guarantee.

Finally, there are **30 registered cooperatives** in Tasmania, according to a list provided by the Department of Justice. These included several primary producers' cooperatives (primarily in the agricultural sector), a number of cooperative housing societies, and a few trade cooperatives across the transport, retail and arts industries.

This snapshot of the population of Tasmanian organisations that fit the legal categories where social enterprises in Australia have most commonly been found, provides the broader context for the discussion which follows. Our analysis demonstrates that these organisations work across a wide

range of social sectors and industries, and that they all potentially generate important public and community benefits. There is not a marked difference in the range of activities and social purposes of those organisations which are legally structured as non-profits, and those which are legally structured as companies. This would suggest that, like the national study, we may expect to find social enterprises in Tasmania using a range of organisational forms to achieve public and community benefits.

4. Fitting the Definition? Findings on the Activities, Mission and Identity of Tasmanian Social Enterprise

One of the aims of this study was to examine to what extent Tasmanian organisations that fit the standard social enterprise definition consider themselves to be social enterprises, and to what extent those organisations that consider themselves to be social enterprises, actually fit the definition. Equally, we were interested to get a sense as to whether the legal forms that were most evident in social enterprises at the national level (incorporated associations, companies limited by guarantee, and cooperatives) would also be most common in Tasmania.

The national FASES survey asked two screening questions to operationalise their broad definition of social enterprise: one about whether the organisation conducted **trading activity**, and one about the nature of the organisation's **mission**. (i.e. whether or not its mission was to generate some form of public/community benefit). Organisations that did not trade, or which existed primarily to provide financial benefits to individuals, were screened out of the national study.

The Tasmanian survey replicated these questions about public/community benefit and trading activities, but also added a third question, 'Do you consider yourself to be a social enterprise?', to pick up on the self-identification issue. The Tasmanian study did not screen out respondents, but rather, sought to understand the dynamic between self-definition and pre-determined definitions, including definitional debates around how much of a social enterprise's income should be gained from trading activities, and what precisely comprises 'trading activities'.

Social Enterprise Trading Activity

When considering the aspect of the social enterprise definition that deals explicitly with trading activity, we see that **91% of survey respondents** indicate that they conduct some sort of **trading activity**, while 9% (n=10) did not.

This result was calculated from Question One of the survey on trading activity. While one might assume that those who answered 'none of the

above' or did not respond to this question were not trading, a closer look at the survey responses indicated that of the 16 organisations that said 'none of the above' (and one that did not answer), 5 used this response specifically to refer to trading activities over and above those included in the original listing (for instance, running paid events or receiving commissions on artwork), and 2 to de-emphasise the relative importance of their trading activity:

> 'While we do operate a retail outlet, it is not our major function.'

> 'All members are volunteer and no specific scheduled fee applies…. [We do]not depend on a fee-paying schedule or defined amount to provide the service'.

This left ten organisations which apparently did not trade at all. On closer analysis, these organisations fell into the following groups:

- Seven (7) that receive their income only through traditional non-profit means: members' subscriptions, donations, government grants and occasional fundraising. They include both incorporated associations and companies (including a publically listed company). Three of these organisations specifically mentioned that they receive government funding for the services they provide, reporting this later in the survey as income derived from trade (even when it was not gained via competitive tendering). Some made a point to state that they did not charge clients for services. Thus they emphasised that they were providing a marketable service, but not trading in a market setting.
- Two (2) local government organisations.
- One (1) that was involved in hall rental, but which did not report receiving any significant income from trading activity.

All ten of these organisations met the public or community benefit element of the social enterprise definition, and importantly, **all stated that they considered their organisation to be a social enterprise**. They are included in the results that follow, even though they do not clearly meet the trade aspect of the social enterprise definition.

Of the responding organisations that trade to fulfill their mission (n=101), the **types of trade** they conducted varied considerably. Organisations were asked to indicate which trading activities they were involved in, with multiple responses permitted.

As can be seen from Figure One, providing **services for a fee** was the dominant form of trading activity with 74% of enterprises. It is important to note that this category aimed to capture fee-paying services, 'whether paid for by the client or by a third party'. **Retail** and **production** were equally common forms of trading activity, with 35% of enterprises producing goods for sale, and 36% involved in retail or wholesale trade. A number of other kinds of trading activity were identified as well.

Figure One:
Trading Activities of Tasmanian Social Enterprises
Multiple responses permitted, of n=101 organisations that trade
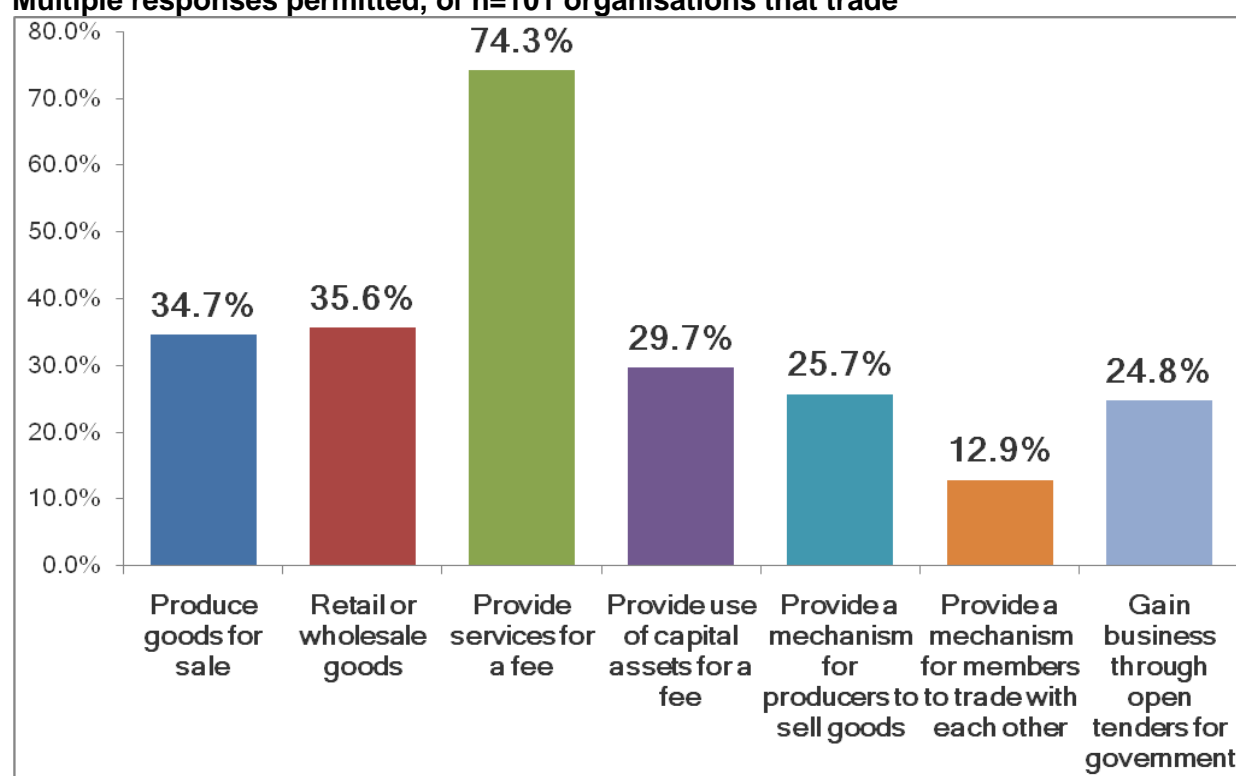
The proportion of income that the organisations responding to the survey derive from trade varied: from no trade income, to all or nearly all of the organisation's income derived from trade. *Trade* is defined here as both income from sale of goods or services and government payments for service delivery via competitive tendering.

Of the organisations that provided an indication of the percentage of income they receive from trade, over two-thirds or **68%** derived more than 50% of their income from trading activities. (See Figure Two).

Figure Two:
Estimated Proportion of income derived from trade
n=87 organisations responding
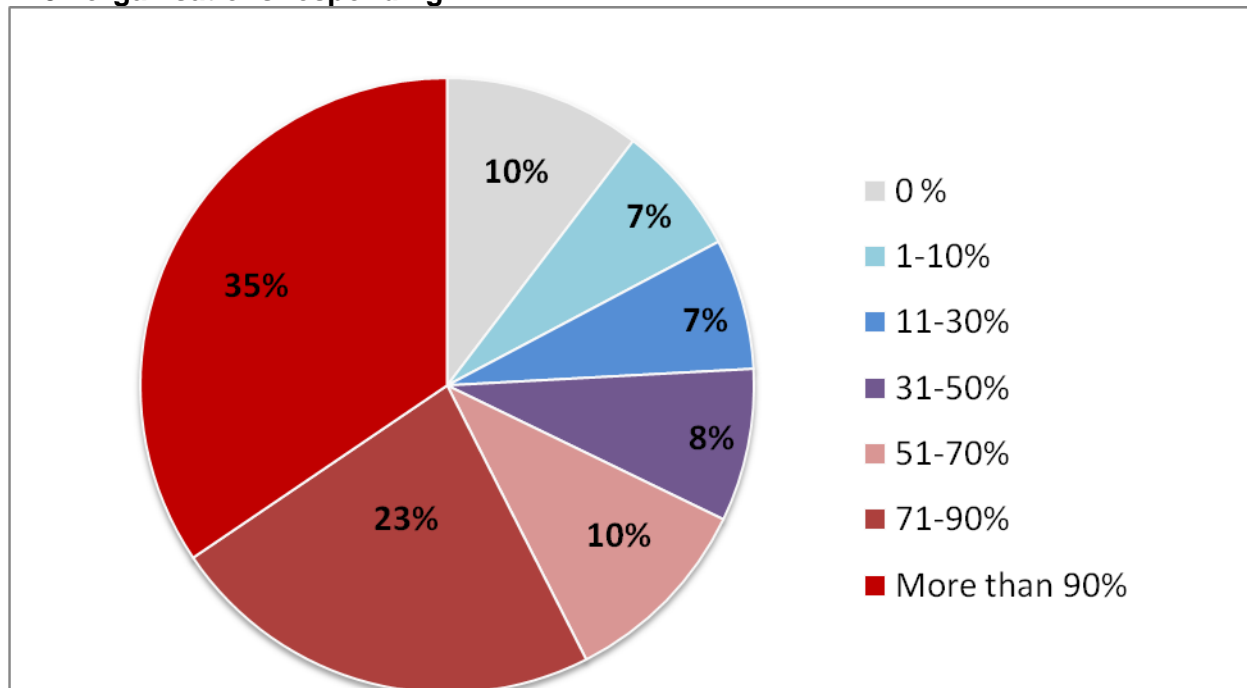
Organisational Mission: Public/Community Benefit

The other aspect of the social enterprise definition is that the organisation has a mission to generate a public or community benefit. This can be expanded to include narrower definitions of 'community': such as organisations that exist to provide benefits to their members or to their non-profit auspice. Typically, organisations that exist primarily to generate financial benefits for individuals are not included under the definition of social enterprise; this is the case for instance in the national FASES survey.

Here, the results from the Tasmanian study are interesting. Unlike the national study, the Tasmanian study allowed respondents to select more than one main purpose. Of the responses, nearly three quarters (74%) specifically indicated that they exist 'primarily to fulfill a public or community benefit', while 23% indicated that 'we exist primarily to support the mission of our non-profit auspice', and about 16% focus on providing benefits to members. (See Figure Three).

A number of organisations indicated that they generated multiple forms of benefit:

> 'The key focus of our organisation is to create benefit to individuals, groups and organisations in the community. In doing so we seek a secondary focus of providing financial compensation to members for their skills and time, and to cover administration/service delivery costs.'

> 'We exist to provide more accessible and affordable environmentally-friendly and healthy food to our members (and the community).'

Figure Three
Organisational Mission of Tasmanian Social Enterprises
Multiple responses permitted, n=109 respondents
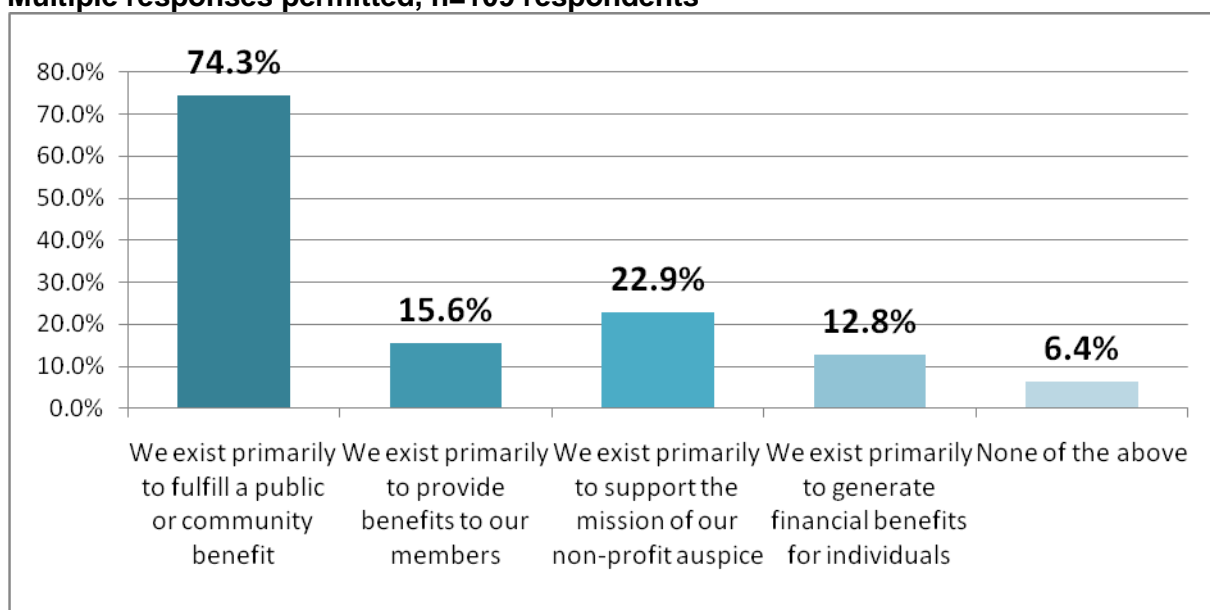
Meanwhile, about 13% of respondents stated that they exist primarily to generate financial benefits for individuals. Is this a case for excluding them from definition as social enterprises?

A closer look at the data would suggest not. First of all, of the 14 organisations where f*inancial benefit for individuals is a key motivating factor*, eight of these nominated financial benefits as *one aspect* of their core mission and/or specifically indicated that the financial benefits generated are generated for others: for instance artists or apprentices. Thus, part of

the larger community benefit generated by these organisations is economic:

> 'We exist to support the culture of contemporary Australian playwriting by generating income for playwrights and promoting / distributing their work.'

> '[We provide] space for local people to sell their creations.'

Of the other six organisations stating that they exist primarily to generate financial benefits for individuals, five are small businesses: one a home-based artist, three sole traders, and a proprietary limited company: working in the arts, training and environmental areas. A sixth is a company limited by guarantee that includes a retail shop, a health clinic, and workshop and event space for community events. While these businesses admit the need to earn money and not all called themselves 'social enterprises', they felt that their work was serving a larger social purpose:

> '[T]though I have a passion for getting everyone to grow more plants, I need to make some money out of it.'

> 'At the end of the day, we are a business, but as booksellers we are active in looking to promote social/cultural capital and the exchange of ideas in the community.'

Finally, about 6% of the respondents, when asked about the kinds of benefits they generated, indicated 'none of the above'. On closer look, these respondents appeared unsure of how to classify the nature of the benefit their enterprise was generating:

> 'Sorry I am not sure! We have 9 paid staff that make a living from working here…. Certainly not all our profits go back into our services as we must also keep up the infrastructure…. A good percentage however which we are not at all obliged to do goes into our programs through our own choice.'

> '[We] create a safe and supportive environment for (mainly) women to learn about and experiment with textiles.'

Not surprisingly, a range of legal structures is represented among the Tasmanian respondents (see Figure Four). Legal structure followed the national pattern in that incorporated associations were the largest group (40% or 41 respondents). The comparatively larger number of incorporated associations responding to the study reflects the large number of these kinds of organisations in Tasmania (see Chapter 3). This was also the largest category of respondents nationally, with incorporated associations comprising 52% of all respondents in the national FASES social enterprise study (Barraket et al 2010:26).

Interestingly, the next largest group of legal forms did not follow the national pattern. The second most common legal structure in the national study was companies limited by guarantee (25%), followed by cooperatives (Barraket et al 2010:26). In Tasmania it was neither. Companies limited by guarantee were only 6% of total respondents in Tasmania; cooperatives, similar to the national study, were about 5%. The second-largest category in Tasmania is sole proprietorships, with 12% of respondents. Other typically private-sector legal forms such as partnerships, proprietary limited companies and publically listed companies were also in evidence, along with a small number of unincorporated associations.

Finally, a number of respondents were not clear how to categorise their enterprise – for instance because they were unsure of the terminology, because they were 'in the process' of becoming incorporated, or because their organisational category did not fit the options given. There were a few nominated legal categories that were not on the original list: such as a local government or state government department, or units working within larger organisations. There were also cases of organisations encompassing multiple legal forms:

> '(Our) main entity is an Incorporated Association but we operate 5 entities and two are Associations Inc., the rest (are)… Companies Limited by Guarantee.'

Overall, the story here was that social enterprises in Tasmania are adopting a range of different legal structures. Despite some of these legal forms being typically 'private sector' structures, many of these businesses were meeting both social enterprise criteria of trade and generating a public or community benefit. This confirms the observation that 'social enterprises operate under various legal structures and are thus not easily visible in the

way that, for example, incorporated not for profits or private sector businesses are.' (Barraket et al 2010:8). Interestingly, in comparison with the national study, many more of the Tasmanian social enterprises took private-sector legal forms: 22% of Tasmanian respondents were sole traders, partnerships, proprietary limited companies or publically listed companies, as compared with only 4% of respondents to the national survey.

A number of the survey respondents made an effort to articulate the space that they occupy as a social enterprise working within a for-profit legal framework:

> 'Although I have a business structure (proprietary limited) I do not run a business with a profit motive – it is concerned with arts and community development.'

> ''We exist to provide an affordable workspace and firing facility to new and experienced clay workers and the general community. Although privately owned and run by a potter and a mixed media artist [a partnership] this basic principle is adhered to as we do not profit from the core business but just make ends meet most of the time.... We organize an annual sale of work and have galleries and shops come in to view the quality handmade Tasmanian work that we produce and to order or purchase directly from the makers.'

Figure Four:
Legal Structure of Tasmanian Social Enterprises
n=101 organisations responding
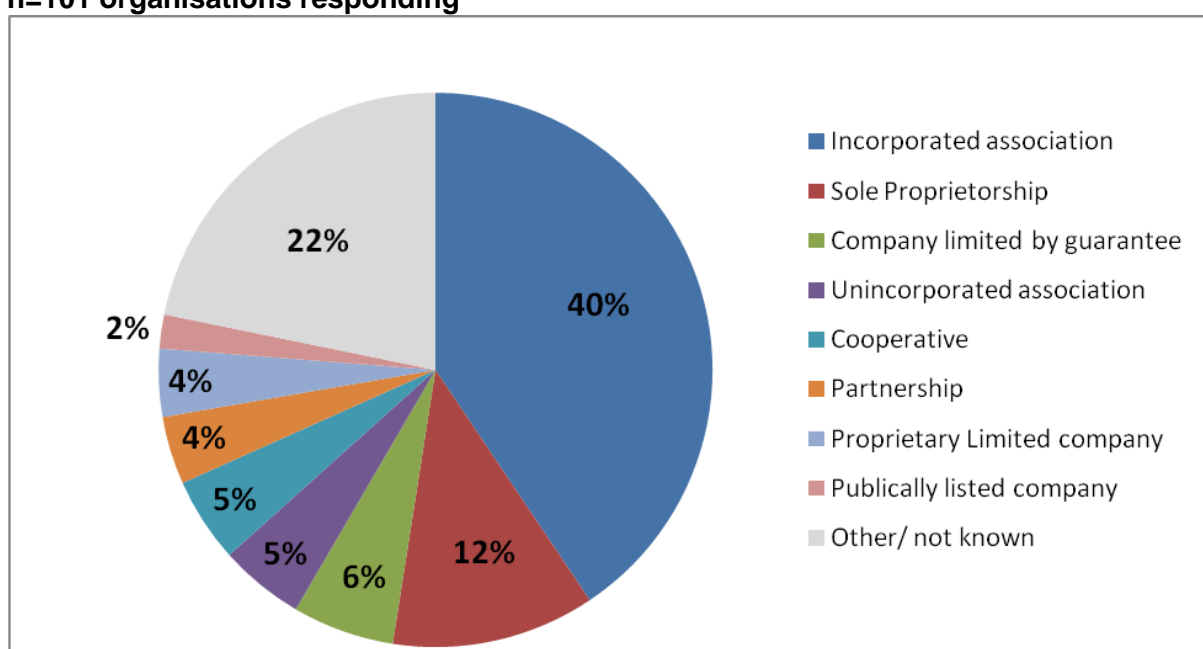
Overall, the findings of the survey suggest that while not all respondents fit a rigorous definition of social enterprise, they are all working in a related space: all of the organisations that responded to the survey are attempting to bring income-generating activities together with work of broader social and community benefit. This is borne out by the fact that over 90% of survey respondents (98 organisations) self-identify as social enterprises (see Figure Five).

**Figure Five: 'Do you consider your organisation to be a social enterprise'?
n=108 organisations responding**
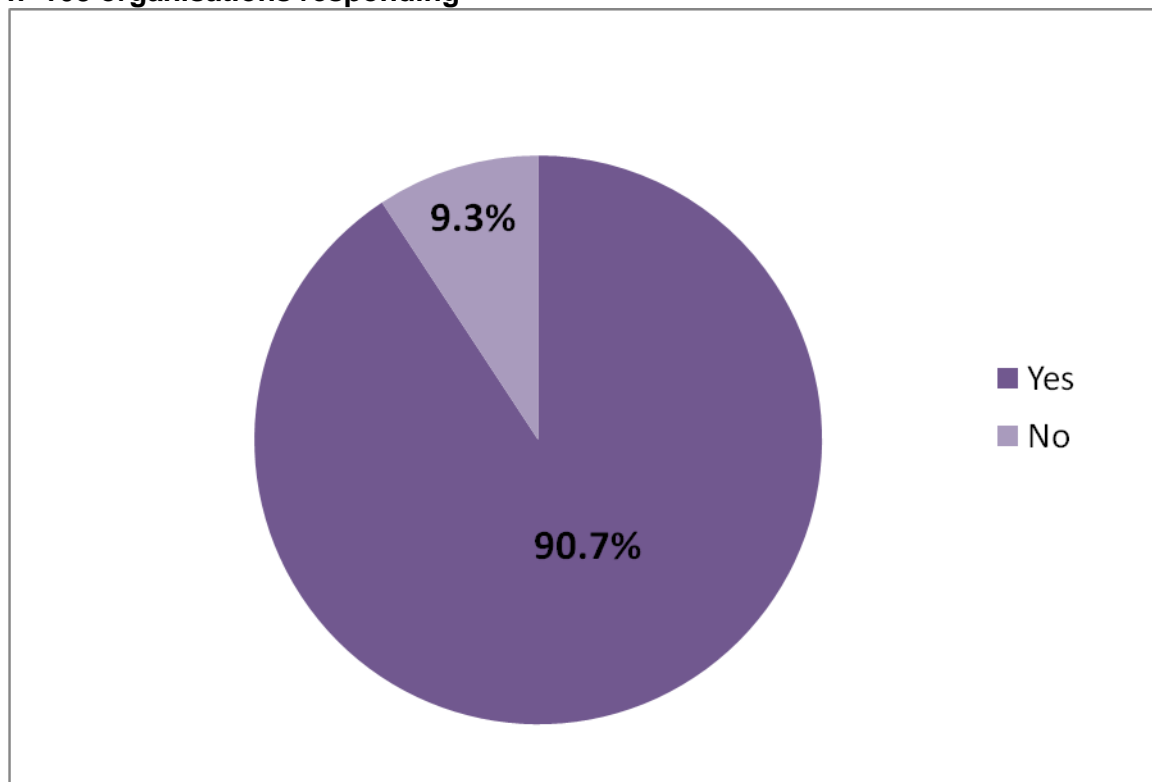
Qualitative responses from these organisations give a sense of the desire to stop and reflect on what it means to be a social enterprise:

'I hadn't thought about [our organisation] in these terms until this survey but yes, I now believe we are.'

'Using business methods, [our organisation] provides community benefits.'

'All of our ongoing costs are funded through our trading activity. We have a clear social purpose and fulfil that purpose through trading.'

'We exist to help our community manage the resources of our area, including environmental and social resources. We decided to go beyond simply offering advice and start promoting local industry, setting up some enterprises ourselves and, as we grow, we intend to assist others to set up as well.'

Of these 98 organisations that self-identify as social enterprises , the great majority (88%) **fit the formal definition**: they both trade and have a mission to generate a broader community benefit. Most of the remainder did not completely meet the 'trading' definition, but they generated public and community benefits, and they considered themselves to be social enterprises (n=10). Only two organisations that did not clearly meet the 'community benefit' definition still considered themselves to be a social enterprise. As one put it:

'[The enterprise] supports social issues through sale of products and services.'

The other four organisations that did not clearly meet the community benefit definition, did not consider themselves to be social enterprises. This finding might suggest that it is easier for 'borderline' organisations in the not-for-profit sector to adopt the label 'social enterprise' than for 'borderline' organisations in the private sector. This is particularly significant to consider in the Tasmanian context where, as we have seen, the second-largest group of organisations responding to the study are sole proprietorships.

Overall, only ten organisations surveyed did *not* consider themselves to be a social enterprise. Some of these organisations met the formal definition of social enterprise and some did not, but **all** were engaged in some form of trading, and all were focused on generating benefits beyond individual profit:

'We are primarily a retail shop but wish to support producers often in marginalised areas or cultures to use traditional skills to support themselves rather than just charity.'

'Not in the true sense although we undertake fund raising activities and support people with disabilities to access social enterprise in the guise of supported employment. ...'

'We are developing social enterprise opportunities on behalf of migrant refugee community groups to give them capacity and enable them to grow and sell their produce to local markets and retail outlets.'

The reasons why these organisations considered themselves *not* to be a social enterprise appeared to be linked to:

- Irregular trading activities
- A strong profit focus, either being 'primarily a business' or being the profit-making arm of a not-for-profit organisation
- Lack of experience ('I am still in the early stage')
- A focus on facilitating the social enterprises of others

In the end, most (91%) of the organisations responding to the survey considered themselves social enterprises, and even those that did not, were all able to provide some evidence of combining trading with the creation of broader social/community benefits.   Thus, all of the organisations responding to the survey are considered 'social enterprises' for the purposes of the analysis which follows.

5. Profile of Tasmanian Social Enterprises

This section presents and discusses the profile of Tasmanian social enterprises responding to the survey in February/early March 2011. The profile of Tasmanian social enterprises is presented below by industry, by geographic location, geographic reach, age, and size as measured by numbers of workers.

Industry of Operation

Social enterprises responding to the survey operate across a range of industries, with the largest representation in **education and training, arts and recreational services, social assistance,** and **personal and other services** (see Figure Six). Many of the social enterprises responding to the survey categorised their work across multiple industry classifications: for instance, some worked across food retailing and food and beverage services; some worked across accommodation and social assistance, and some enterprises worked areas as diverse as arts and recreation, social assistance, and media.

The industry classifications in the survey are based on the nineteen ANZSIC (Australia and New Zealand Standard Industrial Classification) industry divisions and selected subdivisions (see ABS 2006:40-43). Certain industry subdivisions such as 'food retailing' (G41) 'building cleaning' and related (N73) and 'residential care services' (Q86) were included specifically because a broader representation of social enterprises might be expected in those areas. The industry divisions and subdivisions included on the Tasmanian survey replicated those on the national FASES survey (Barraket et al 2010) for purposes of comparability.

Education and Training

As shown in Figure Six, 57 or **56%** of Tasmanian social enterprises work in the Education and Training industry – an industry division that includes preschool, school, tertiary, and adult and community education. Education and Training was also the most commonly cited industry for social enterprises in the national study, with 41.6% of respondents in the national study working in this industry (Barraket et al 2010:21).

Figure Six: Industry of Operation, Tasmanian Social Enterprises
Multiple responses permitted, n=102 social enterprises
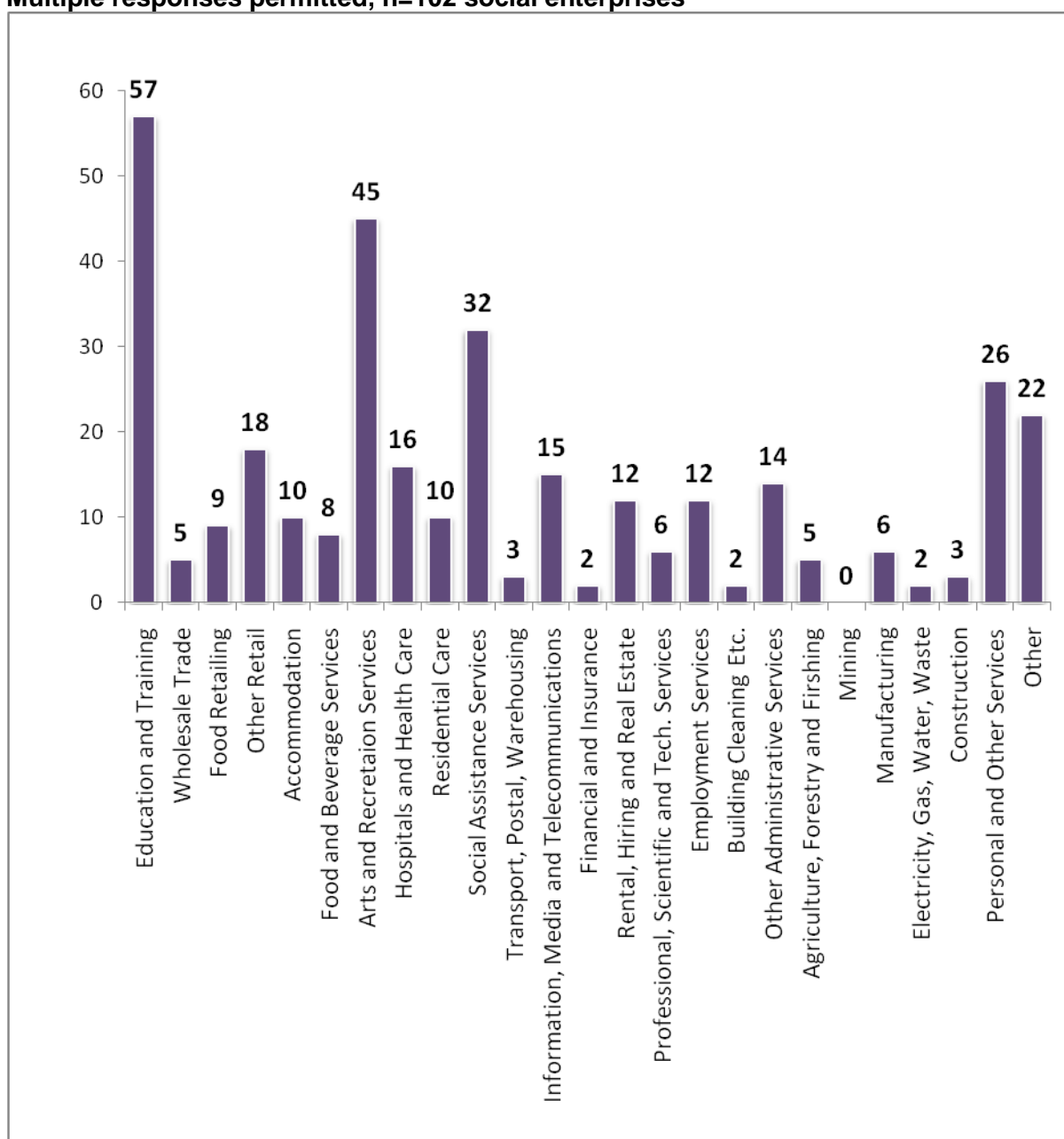
Education and training enterprises responding to the survey were of the following types:

- Those providing community classes and public workshops in particular areas such as the arts, craft, multimedia, public speaking, yoga, literacy, etc. – sometimes specifically with an empowerment focus;
- Those providing targeted job-related training and professional development for adults;
- Pre-employment training programs;
- Disability employment organisations;

- Those providing a general level of community education/awareness raising on particular topics (e.g. suicide prevention, environmental education, health);
- Educational programs for students; and
- Organisation working with preschool children (playgroups/ day care).

The majority of the organisations working in the education and training industry were therefore focused on **adult and community education**.

A number of the organisations working in the Education and Training industry also worked in the following industries:
- Arts and Recreation Services: 46% (26 of 57);
- Social Assistance Services (e.g. childcare, disability support): 44%, (25 of 57);
- Personal and Other Services: 37%, (21 of 57)
- Health Care: 19% (11 of 57)

As well as a number of other industries. About 16% (9) indicated that they also worked in Employment Services, suggesting that those who are specifically providing job-related training are a relatively small group.

Arts and Recreation Services

The second-largest grouping of Tasmanian social enterprises was in the Arts and Recreation Services industry. This ANZSIC division includes heritage activities, creative and performing arts activities, sports, and recreation activities. A total of 45 enterprises, or **44%** of surveyed social enterprises, worked in arts and recreation services. This compares with 31.7% of social enterprises in the national survey (Barraket et al 2010:21). In both the Australian and the Tasmanian studies, arts and recreation services were the second-largest industry category.

Tasmanian social enterprises in Arts and Recreation Services were of the following types:
- Those that provide some combination of arts or craft venues, equipment, community activities, arts events/festivals, exhibitions/performances, classes and workshops
- Those providing services in the arts/ cultural development area, including art therapy, services to artists (directories, promotion,

exhibition management, sales, etc.), and services to arts organisations.
- Those providing recreational services (e.g. local Councils) or other recreational activities (e.g. gardening)
- Those providing other kinds of community events and venues

There was a strong presence of arts-related organisations in this group. At the same time, many of these 45 organisations categorised themselves across other industries:
- 58% (26) of social enterprises in the Arts and Recreation Services industry also categorised themselves as Education and Training industries;
- 24% (11) also categorised themselves in the Information, Media and Telecommunications industry;
- 24% (11) also categorised themselves in Social Assistance Services (e.g. childcare, disability support);
- 24% (11) categorise themselves in Personal and Other Services; and
- 24% (11) also categorised themselves in some form of Retail Trade.

Social Assistance Services

Social Assistance Services is a subdivision within the ANZSIC classification 'Health Care and Social Assistance'. In the Tasmanian survey, 32 social enterprises (**31%**) stated that they worked in the social assistance area. This was also the third-largest industry category in the national survey, though with less than 20% of respondents in this industry (Barraket et al 2010:21).

Social enterprises in this industry in the Tasmanian survey included a broad range of organisations working in the following areas:
- Community development
- Disability
- Health/ food security
- Housing
- Adult education
- Early childhood development

And others, including local councils and arts organisations.

As with the other industry categories, there is considerable overlap with other industry categories, particularly:
- Education and Training: 78% (25)

- Personal and Other Services: 47%, (15)
- Arts and Recreation Services: 33% (11)
- Information, Media and Telecommunications: 31% (10)
- Other Administrative and Support Services 31% (10)

Personal and Other Services

Personal and Other Services is a subdivision within the ANZSIC classification 'Other Services' and includes personal care services, civic, professional, and interest group services, and other personal services. In the Tasmanian survey 26% of social enterprises categorised themselves in personal and other services.

There was considerable overlap between these organisations and the other industry categories mentioned above, with many of the same kinds of organisations represented here. Nearly all the respondents in this category nominated one or more other industries of work including:
- Education and Training: 81% (21))
- Social Assistance Services: 58% (15)
- Arts and Recreation Services: 42% (11)
- Information, Media and Telecommunications: 38% (10)
- Other Administrative and Support Services:35% (9)
- Health Care: 35% (9)

Other Industries where Social Enterprises are Found

Overall there is a broad coverage of industries among the survey respondents, including Retail (27), which is divided into Food Retailing and Other Retail; Health Care (16), and Information, Media and Telecommunications (15). There were 10 residential care providers and 12 employment services providers. Looking across the board at the range of industries, mining is the only industry with no responding social enterprises in Tasmania.

Finally, twenty two enterprises selected the 'Other' category. While some of this may be attributed to an uncertainty as to how their enterprise fits in the formal industry classification system, the 'other' responses demonstrate a range of activities that also sit 'at the boundaries' of the traditional categories, with the following kinds of industries nominated:
- Tourism industry
- Recycling/ resource recovery

- Wildlife, wilderness services
- Community development
- And others.

This overview of the industry of operation of Tasmanian social enterprises highlights the diversity of the sector, as well as the broad consistency of our profile with the national profile. This profile also demonstrates that a large number of Tasmanian social enterprises place themselves in multiple industries, suggesting that these social enterprise may overlap traditional definitions of industry groupings.

Geographic Location and Reach

Of the 29 local government areas in Tasmania, all but two (George Town and Flinders Island) had social enterprises that responded to this study. The largest number of responses came from the Hobart municipality with 27% of all social enterprise locations, followed by Launceston with 21%. A number of these social enterprises also had operations in other parts of the state. Overall, the results demonstrate a good spread across the state. (See Map One).

It is important to observe that many Tasmanian social enterprises worked in multiple locations. Thus, 183 distinct social enterprise locations were identified through the survey. The majority of these locations were directly providing services to clients / the community. Some locations housed multiple activities, while a few were specialised retail or production sites. A breakdown of Tasmanian social enterprise locations by industry is provided in Appendix Two.

In addition to locations where activities were regularly carried out, several social enterprises observed that they are able to provide services in every local government area within the state, or within a particular region. Thus, even when an area appears to have little or no presence of social enterprises, local residents may still access services and support from social enterprises located elsewhere.

In the survey, Tasmanian social enterprises were asked specifically to indicate their geographic focus and the nature of their geographic reach. Social enterprises were asked, first, what is 'the geographic focus of the social purpose or issue that your organisation aims to address', with the opportunity to pick as many answers as were appropriate. Figure Seven describes that many social enterprises have a strong local focus (58%), as

well as a regional and statewide focus (44% respectively). About 28% of respondents indicated that their enterprise was focused on national issues, and 17% had an international focus.

Figure Seven:
Geographic Focus of Tasmanian Social Enterprises
Multiple responses permitted, n=104 social enterprises
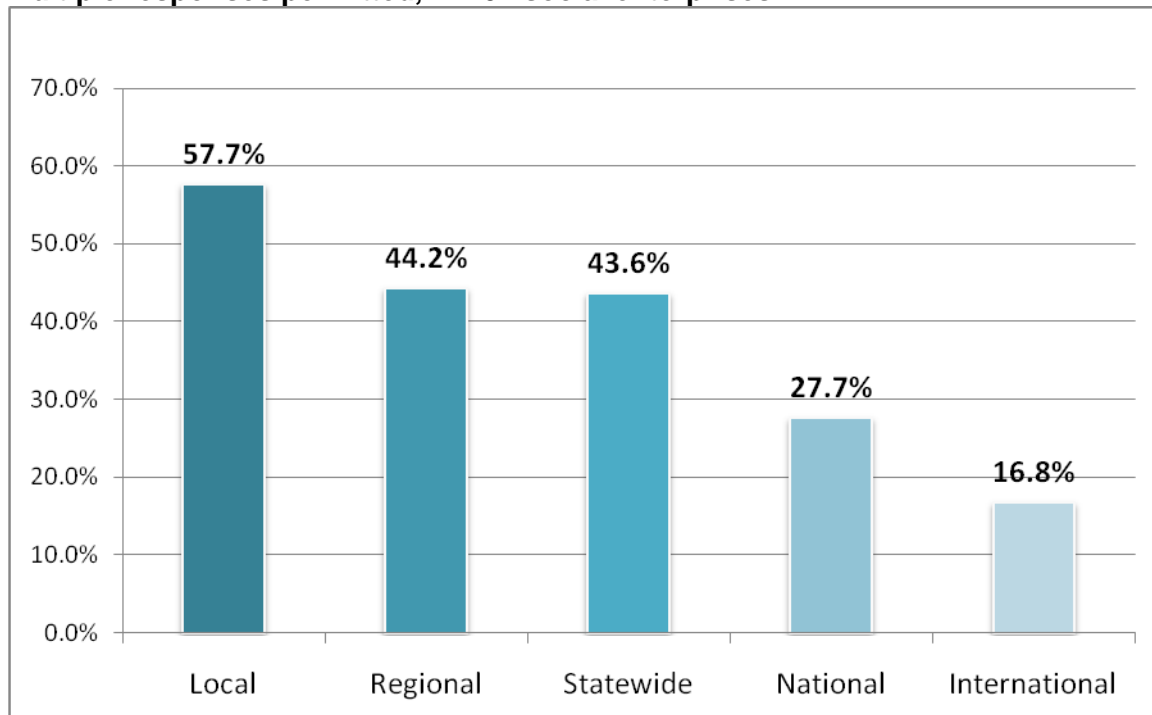
Social enterprises were also asked to indicate the geographic reach of their markets. Again, the results were well spread across local, regional statewide, national and even international markets, with twenty-nine enterprises overall stating that they trade in national or international markets, and 40 trading statewide (see Figure Eight). While there is a predictably strong focus on local markets (51% of responding enterprises), Tasmanian social enterprises seem to be focusing more on markets further afield than their counterparts in other states. In the national FASES study, 62% of enterprises were focusing on local markets, and less than 30% of social enterprises had a statewide market focus (Barraket et al 2010:22).

Map One:
Number of Social Enterprise Locations by LGA, Tasmania, 2011

SOCIAL ENTERPRISE LOCATIONS by LGA
2011
Based on Survey Responses

n=183 locations across Tasmania

Legend:
- 0
- 1 - 4
- 5 - 9
- 10 - 20
- More than 20

Figure Eight:
Geographic Focus of Markets for Tasmanian Social Enterprises
Multiple responses permitted, n=94 social enterprises
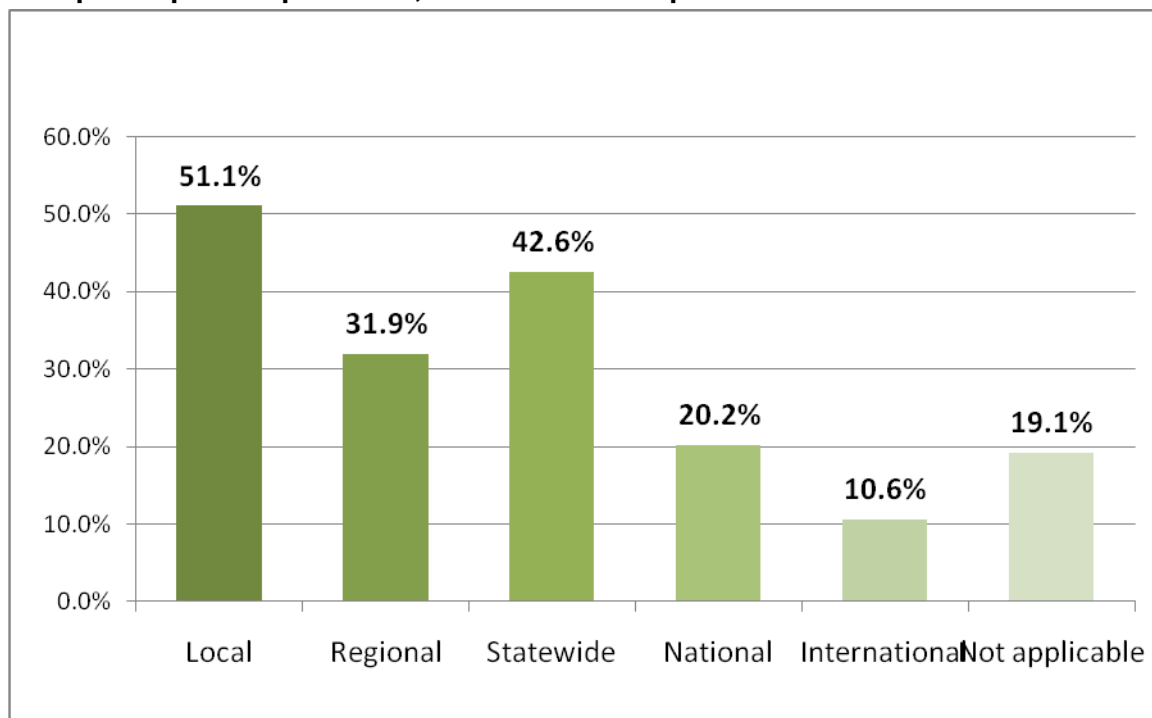
Age of Social Enterprises

While the idea of social enterprise is often presented as something new, many social enterprises have been around for a long time. This is clearly the case for Tasmanian social enterprises. Over half (57%) of Tasmanian social enterprises responding to the survey have been in operation for more than ten years. Some organisations are well over fifty years old.

These findings echo the national survey, in which 62% of social enterprises were over ten years old (Barraket et al 2010:19). The predominance of long-established enterprises in both the state and national surveys demonstrates that social enterprises can be sustainable over long time frames. Long-term social enterprises also provide valuable sources of expertise and opportunities to learn from the approaches they have taken.

There are also newer social enterprises emerging on the landscape. In Tasmania, survey results show that about 10% of social enterprises are less than two years old, and a further 3% are very new startups, not yet fully operational. About 30% of enterprises are between two and ten years old (see Figure Nine). The presence of both newer and older social enterprises presents the opportunity to learn from established enterprises and share that knowledge with new and emerging social enterprises.

Figure Nine:
Length of Operation of Social Enterprises in Tasmania
Multiple responses permitted, n=101 social enterprises responding
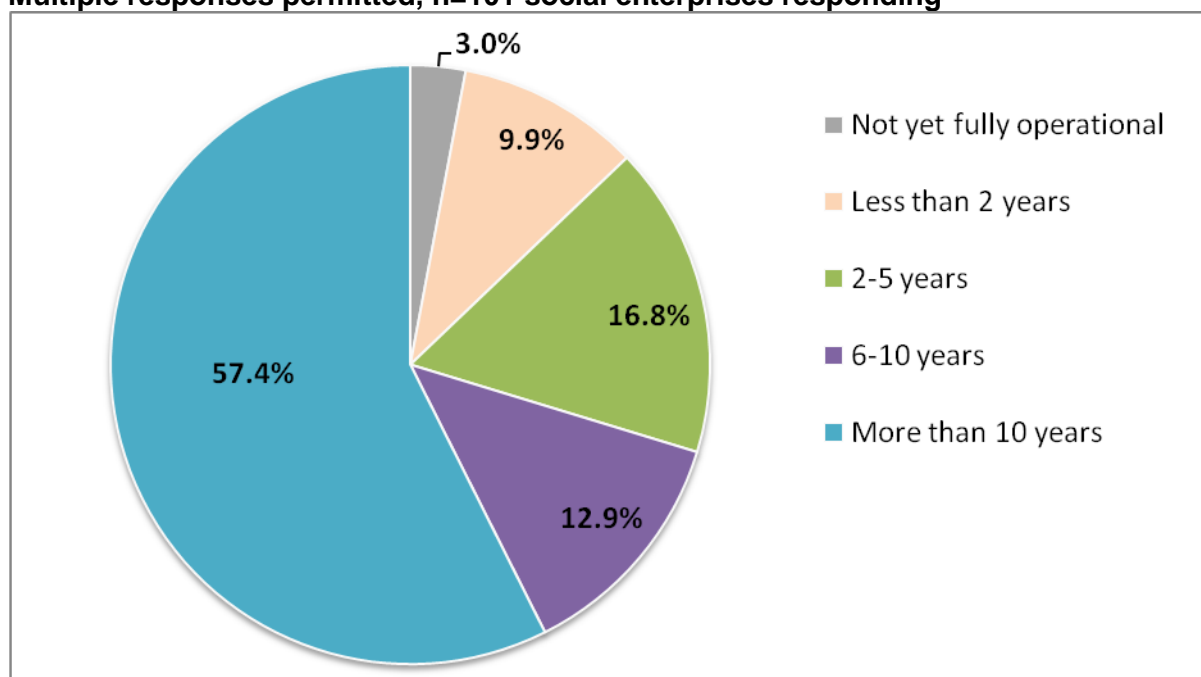
Enterprises responding to the survey were also asked how long they had been engaged in regular trading activity in Tasmania. This question recognised that an older organisation may have commenced its trading or market-based activity more recently.

These responses also emphasised the longetivity of much trading activity within social enterprises. Fifty-one percent of these social enterprises indicated they had been trading for more than ten years. At the same time, trading was a relatively new activity for some enterprises. As can be seen in Figure Ten, 19% of social enterprises had been trading for less than two years.

Figure Ten:
Length of Operation of the Enterprise's Trading Activities in Tasmania
Multiple responses permitted, n=90 social enterprises responding
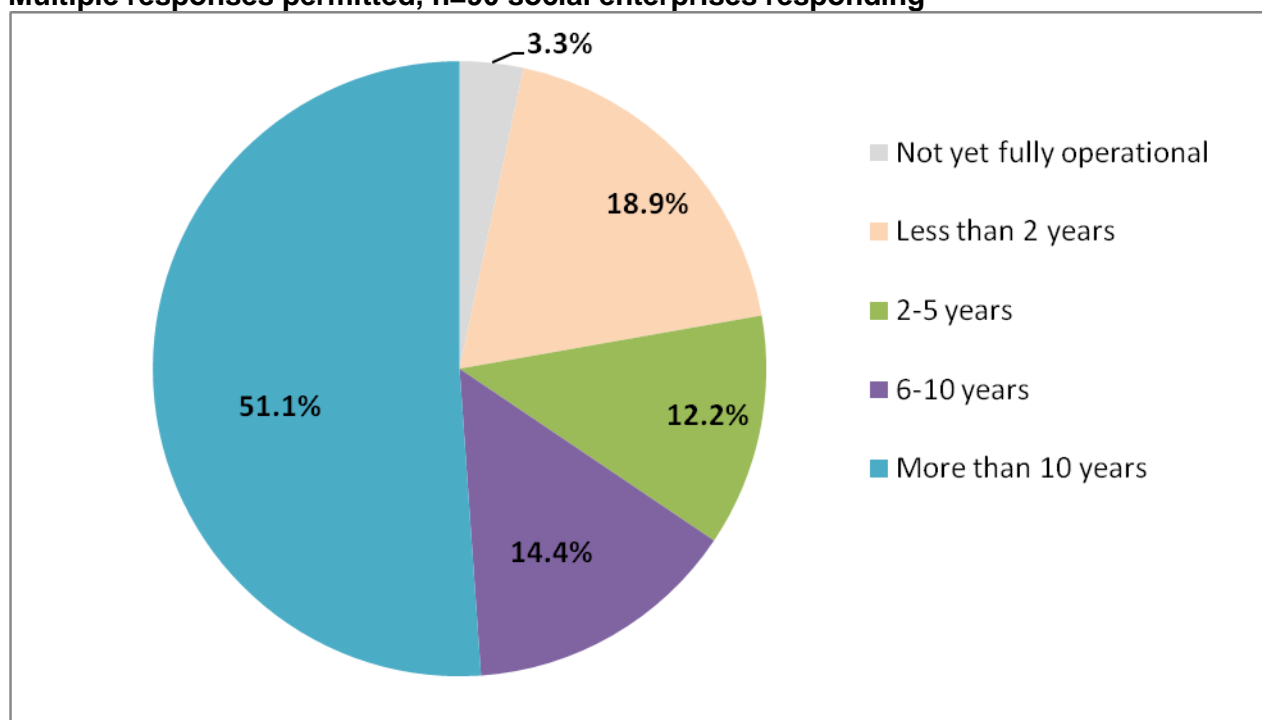
Size of Social Enterprises

The number of employees can be used as one indicator of the size of enterprises. When considering the size of a social enterprise, however, it is important to consider not only paid employees but also the size of the volunteer workforce. Survey respondents were therefore asked to indicate their number of full time and part time paid employees, as well as casual paid employees and volunteers.

Of responding social enterprises, about half, or 54% had **full-time paid employees**. The number of paid full-time workers also varied enormously, from a single paid employee to several hundred. It is notable that 16% of social enterprises had more than 20 full time paid employees, while 56% had no full time paid employees at all. Removing a single outlier (with 2000 full-time employees), the average number of full-time paid workers in responding social enterprises was 19 (see Figure Eleven).

Sixty percent of social enterprises had **part-time paid employees**. Most had fewer than a hundred. Removing the outlier, the average number of part-time workers in Tasmanian social enterprises was 8. Again, some organisations had only one or two part-time paid workers, while others had several dozen.

40

As anticipated, many Tasmanian social enterprises rely on **volunteers**. The usage of volunteers was at a similar proportion to paid workers, with about 57% of responding social enterprises reporting that they have volunteer workers. The average number of volunteers per organisation was 23.

It is also important to observe that many social enterprises have both paid workers and volunteers. Some, on the other hand, rely solely on one or the other. Social enterprises vary considerably in their human resource capacity: some function as owner-operator enterprises with no additional labour resource, others are 'micro' social enterprises with fewer than five workers, and a number take the basic shape of SMEs (small and medium enterprise). There were also a few larger social enterprises with well over a hundred workers.

Figure Eleven:
Average Number of Workers per Enterprise
Calculated from n=96 social enterprises responding

6. Social Enterprise: Achievements and Aspirations

Having reviewed the profile characteristics of Tasmanian social enterprises as revealed by survey responses, we continue in this chapter to explore the nature of the benefits created by these enterprises, as well as their aims and aspirations for the future.

The first two sections review the types of beneficiaries that Tasmanian social enterprises serve and the nature of these enterprises' social purpose. From there we go on to ask more detailed questions about the levels of beneficiary participation within these social enterprises, the extent of evaluation of the social and community benefits generated, and Tasmanian social enterprises' future aims, particularly whether or not they are aspiring to grow the scale or scope of their present activities.

Types of Beneficiaries

The social enterprises in this survey reported serving a broad range of beneficiaries. The largest beneficiary groups served by Tasmanian social enterprises are **young people (54%** of social enterprises), **people with disabilities (51%)** and **families (50%)**. (See Figure Twelve). The latter two groups were more strongly represented in the Tasmanian sample than in the national survey (see Barraket et al 2010: 24).

Of all the potential beneficiary groups nominated, there were none that remained outside of Tasmanian social enterprises' work. As Figure Twelve illustrates, social enterprises serve the elderly, the homeless, geographic and cultural communities, workers and professionals, the unemployed, people with mental illness, and a range of other beneficiary 'target groups'. While there is a strong focus on people and communities, some social enterprises also work with animals and/or the environment.

Many social enterprises highlighted in their comments that their organisation serves many different types of beneficiary groups:

> 'Our reach is very general. The arts engages and involves people from all backgrounds, that's why it is such a useful tool.'

> 'We see people from all ages, cultures and abilities. We do not capture distinct data about whether they are employed or not, disadvantaged, sexuality, financial or other capacity, etc.'

'[T]here is hardly a group or region we do not engage with in Tasmania.'

Figure Twelve:
Types of Beneficiaries, Tasmanian Social Enterprises
Multiple responses permitted, n=92 social enterprises responding
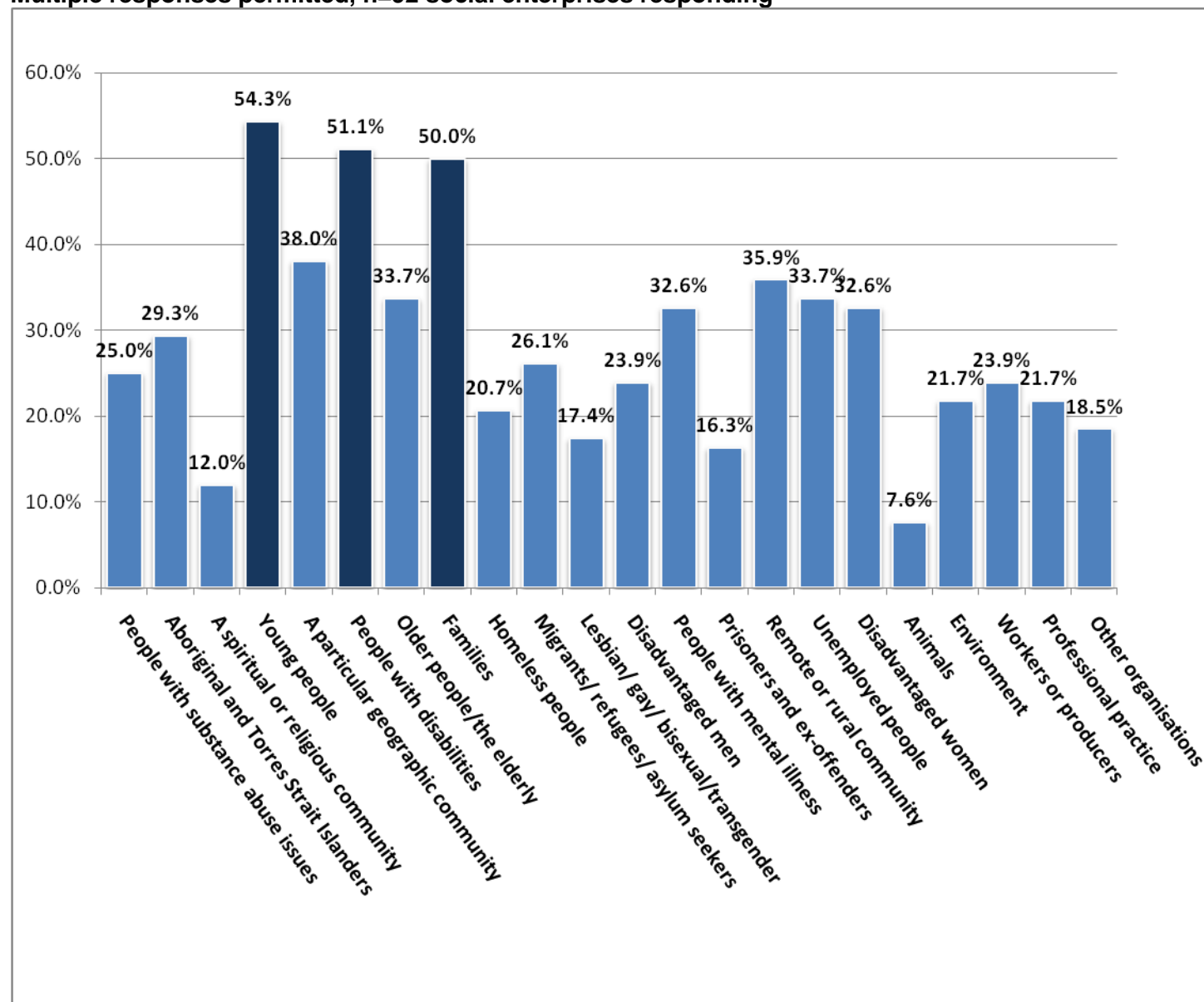
The beneficiary reach of Tasmanian social enterprises is not easily predicted by industry. For instance, social enterprises in the Education and Training industry (n=57) serve a broad range of beneficiaries: young people (65%), people with disabilities (56%), and families (56%) are the three largest groups. At the same time, education and training enterprises also serve unemployed people, disadvantaged men and women, people with mental illness, migrants/refugees, and a broad range of other beneficiary groups.

Similarly, social enterprises in the Arts and Recreation Services industry (n=45) also serve young people (56%), people with disabilities (49%), families (44%), and remote or rural communities (44%) as their largest beneficiary groups. At the same time, they also serve and an equally broad range of other beneficiary groups including, but not limited to, older people, disadvantaged women and men, people with mental illness, and a community of professional practice.

Overall, the story here is that the 'reach' of Tasmanian social enterprises encompasses a broad range of important beneficiary groups, regardless of social enterprises' sector or industry of operation.

Nature of Social Purpose

One of the defining characteristics of a social enterprise is that it is intended to create a public or community benefit. Benefits can take a range of forms, from innovative social problem solving to direct service provision, employment generation, or a range of other potential benefits.

In the survey, respondents were asked to indicate the main purposes of their organisation, with specific reference to areas of potential social benefit (See Figure Thirteen).

Results indicated that the largest proportion of social enterprises aimed to **create opportunities for people to participate in their community**. This was by far the most common response, with over 70% of social enterprises listing the creation of community participation opportunities as one of their main purposes. This suggests that social enterprises are potentially playing a strong role in generating social inclusion benefits and community strengthening. Participation opportunities were also the most frequently cited category in the national FASES social enterprise study, though with only 44% of respondents (Barraket et al 2010:23)

The second-largest area of social purpose for Tasmanian social enterprises is to create social innovation; namely, to **develop solutions to social, cultural, economic or environmental problems.** Over 50% of social enterprises listed this as one of their main purposes. Social innovation was the focus of 26% of responding social enterprises nationally (Barraket et al 2010:23). While the Tasmanian results broadly follow the parameters of the national study, the Tasmanian social enterprise sector appears to have a particularly strong orientation toward innovation and problem-solving.

In addition, a significant number of Tasmanian social enterprises are focusing on **providing needed goods or services to a specific area** (33%) **or to a specific group** (35%), emphasising also the importance of social enterprises in the areas of access and service delivery.

Equally, a number of organisations are involved in advocacy, with their purpose being to **advocate or promote the interests of a particular group or cause** (36%). Thirty percent of social enterprises are working to **advance cultural awareness**; again, with the potential to generate important social inclusion outcomes.

A number of social enterprises also focus on **employment generation and/ or training**. Some organisations focused on a specific geographic area, with 22% of organisations providing employment opportunities, and 23% providing training opportunities for people from a specific area. Some organisations focused on a particular group, with 17% of social enterprises providing employment opportunities, and 28% providing training opportunities, for people from a specific group.

Finally, it is apparent from Figure Thirteen that Tasmanian social enterprises aim to create a wide range of social and community benefits, including reinvestment of income in charitable services or community activities (23%) addressing an environmental issue (14%), and providing a vehicle for members to trade, either with each other (6%) and/or on the open market (11%).

The social purposes of Tasmanian social enterprises broadly matched the patterns in the national study, though the Tasmanian cohort had a particularly strong sense of social purpose around **community participation** (71% of respondents, compared with 44% nationally) and **social innovation** (51% of respondents, compared with 26% nationally). These may be two important areas to explore in follow up research, to determine if there are particularly strong tendencies for social enterprises to focus on participatory and/or innovative social activity in the Tasmanian context.

Figure Thirteen: Social Purpose of Tasmanian Social Enterprises
Multiple responses permitted, n=105 social enterprises responding
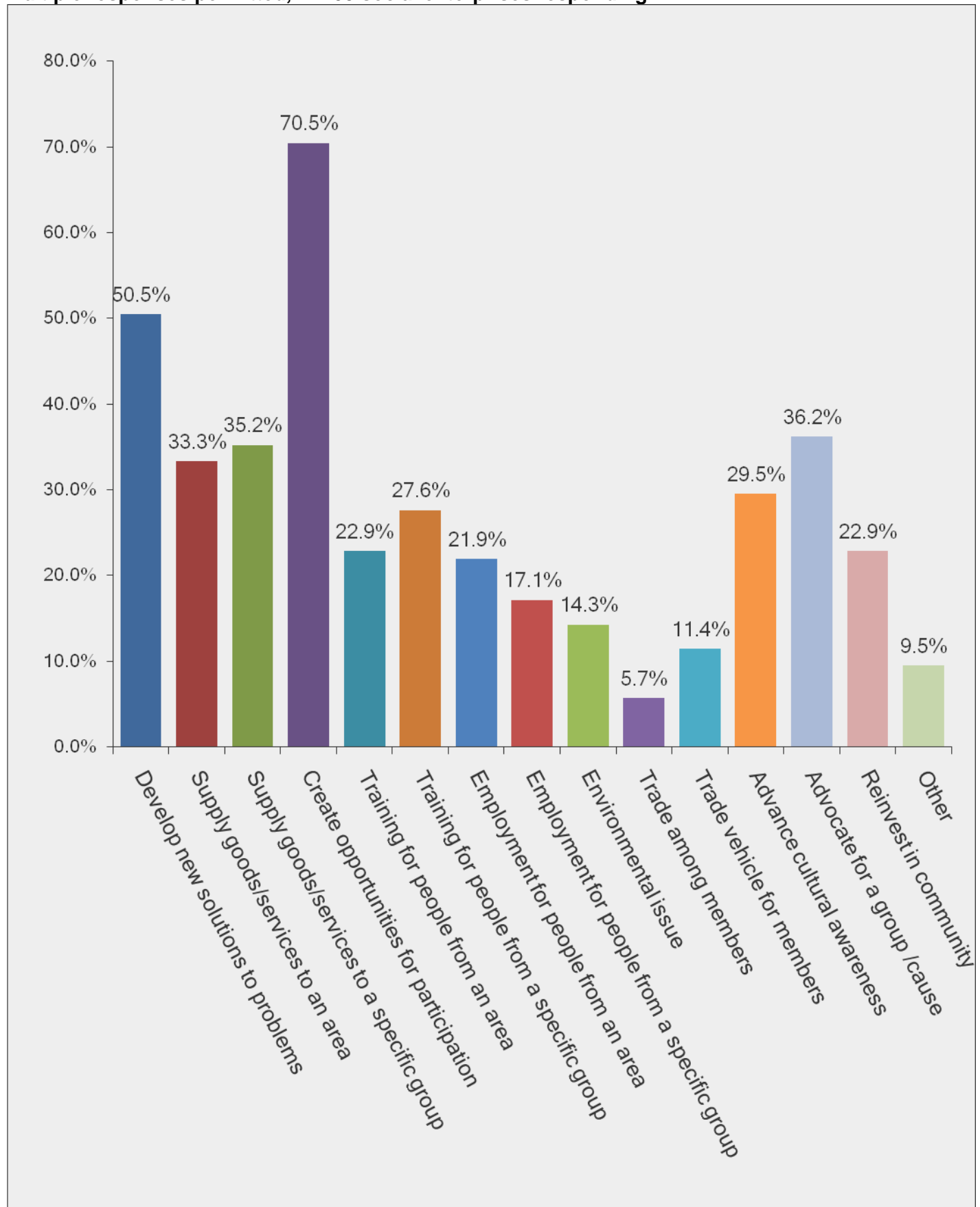
As we have seen in the previous chapter, **creating opportunities for people to participate in their community** is a key area of social purpose for Tasmanian social enterprises. Given this tendency, it is particularly interesting to explore the extent to which social enterprises' aspirations to enhance community participation may be translating into active levels of participation in organisation management, decision-making, service delivery or other areas.

To gain some insight into this area, Tasmanian social enterprises were asked to give their assessment of the extent to which their beneficiaries were actively involved in their organisations. Survey respondents were asked to rate their level of agreement or disagreement with the following statements on a five-point scale:

1) 'Our beneficiaries are actively involved in our organisation'
2) 'Our beneficiaries are actively involved in our trading activities'
3) 'Our beneficiaries are formally involved in decision-making'
4) 'Our beneficiaries are informally involved in decision-making'
5) 'Our beneficiaries are actively involved in delivering our programs and services.'

As a gauge of social participation, these results can give us an indication of the role these enterprises may be playing in promoting outcomes around social and community participation and social inclusion.

Results suggest that the participation of beneficiaries in these social enterprises is generally high, with 63% of social enterprises agreeing or strongly agreeing that their beneficiaries are actively involved in their organisation. (See Figure Fourteen).

The survey also asked more specifically about beneficiaries' participation in decision making. The strongest levels of participation in decision making were informal; two thirds (66%) of responding social enterprises either agreed or strongly agreed that their beneficiaries are informally involved in decision making. This represents a reasonably strong degree of participation; particularly when compared with the national study, where only about half of social enterprises indicated that their beneficiaries are informally involved in decision making (see Barraket et al 2010:30).

Figure Fourteen:
Level of Involvement of Tasmanian Social Enterprise Beneficiaries
n=100 social enterprises responding
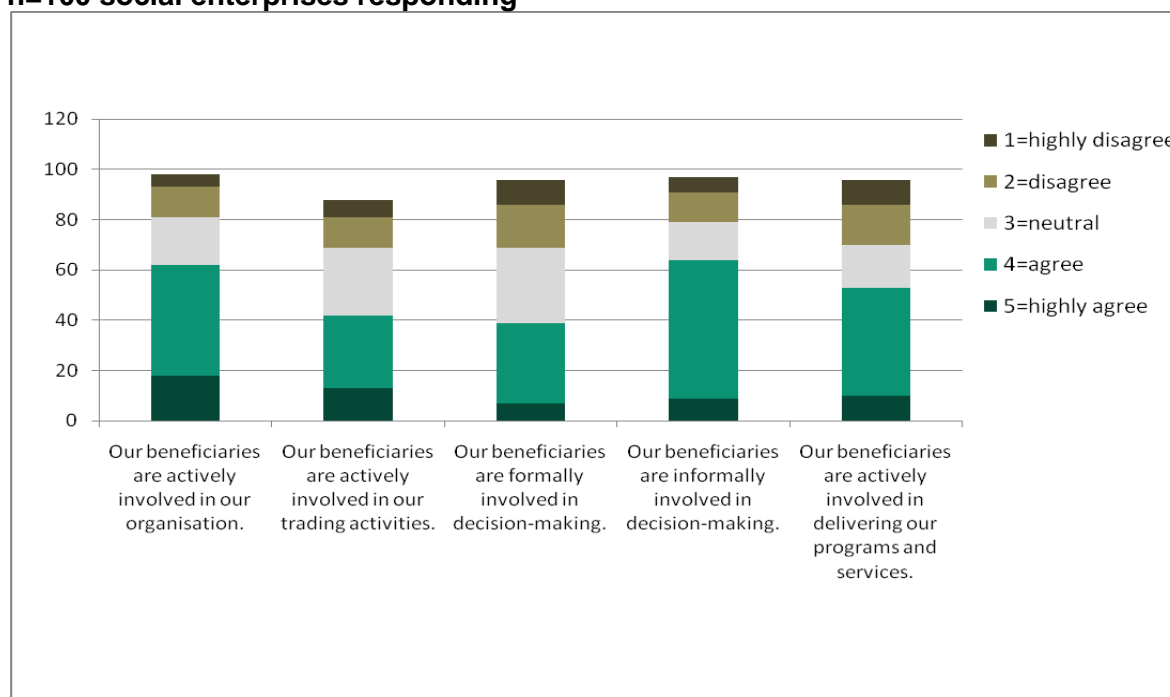
Formal participation of beneficiaries in decision making was, however, less prevalent than informal participation; in the Tasmanian sample, only 41% of social enterprises indicated that they agreed or strongly agreed that their beneficiaries were *formally* involved in decision-making in their organisation. Nevertheless, 41% is still a reasonable level of formal participation, and is slightly higher than levels of formal participation reported in the national study, even among member-based organisations (see Barraket et al 2010:30).

Finally, the Tasmanian survey included questions to gauge other forms of beneficiary involvement beyond decision making *per se*. These included active beneficiary involvement in trading activities, and active involvement in the delivery of programs or services. In each, about half of social enterprises agreed or strongly agreed that their beneficiaries were actively involved: 55% in program and service delivery, and 48% in trading activities. These thus represent other potentially significant areas of beneficiary participation.

Evaluation of Impacts

Tasmanian social enterprises were asked to indicate whether and to what extent they conducted evaluations of the impact of their work. This information is important in giving a picture of the extent to which

community benefit of social enterprises' work has been formally documented. Evaluation reports can provide a strong evidence base to assess social enterprises' community benefit claims. In addition, the extent to which organisations do or do not conduct evaluation processes gives a sense of the degree of reflective practice and action learning that is taking place within these organisations.

The results from the survey were mixed, with about 58% of social enterprises not conducting any evaluation of their impacts, while well over a third (36%) have evaluated their work. (See Figure Fifteen)

Figure Fifteen:
Has your organisation conducted any studies to measure or assess the impact of your activities for people or communities in Tasmania?
n=99 Tasmanian Social Enterprises responding
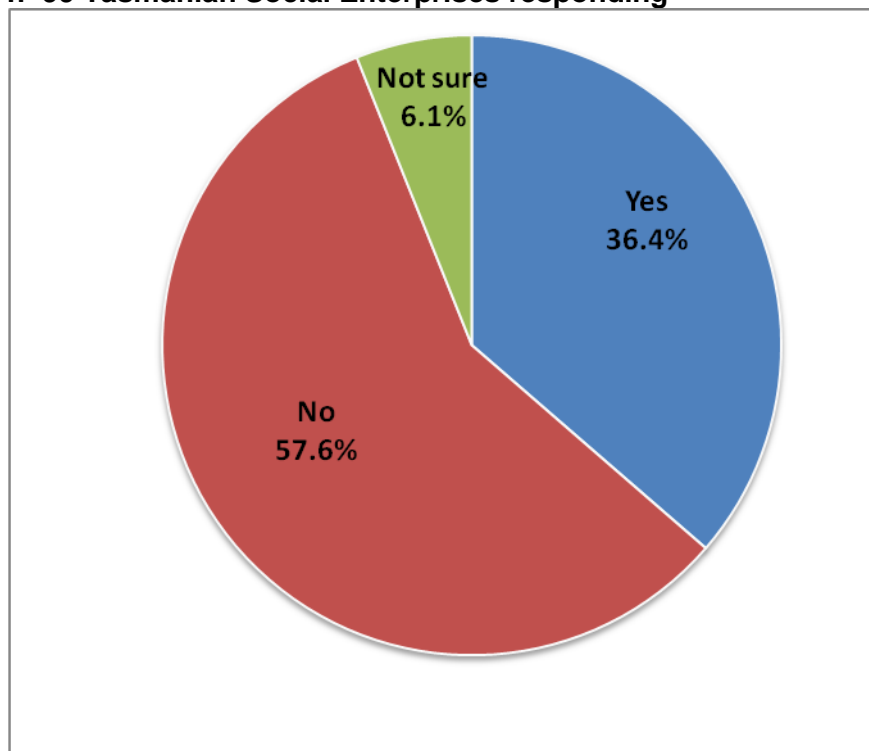
Of the 36% of organisations that indicated they have conducted evaluation work, the bulk of evaluation processes are informal and internal. Only a handful of publically available evaluation reports had been prepared. Nevertheless, these organisations are using a range of data collection methods including:
- case studies
- surveys of various kinds
- purpose-developed measurement tools
- interviews
- practitioner logs/ notes

- community consultations
- collection of basic statistical data on clients, etc.

They are using the resulting data to inform reflective practice, as well as sources of material for internal and external reporting:

> 'While not formal studies, we do regularly collect feedback from our community - in community consultation forums, surveys, and by word-of-mouth. This data is collected and collated and used to determine what we need to focus on next.'

> 'We do evaluation of most programs and write up case studies that have only been used internally to date.'

> '[E]valuating services is part of our reporting frameworks - they are not publically available.'

In some cases, there is interest in strengthening informal evaluation processes:

> 'We have conducted some research and got feedback from a range of stakeholders about our work, mainly from the beneficiaries. We are not satisfied we have trapped or collated the true social impact of our work nor that work over time.'

Several organisations (including one that answered *no* to the evaluation question) indicated that they were either planning, or in the process of, undertaking an evaluation study on their work. In addition, four organisations indicated that they have evaluations or research reports that are publically available , and a fifth is willing to make its evaluation studies available to the public on request.

The informal, reflective evaluation practices that have been used to document the experiences of many social enterprises in Tasmania are representative of the approach of many social enterprises around the world. The School for Social Entrepreneurs in Australia has thus adopted a reflective, practitioner led evaluation process that values the skills of the practitioner and the experience of the organisation. There is a real opportunity to learn from this work, in conjunction with the formal evaluations that have taken place.

Respondents were asked to indicate their aims over the next three years as regards trading activity, geographic reach, and other significant planned change. (See Figure Sixteen).

Results came out strongly in favour of growth and expansion, with 76% of social enterprises aiming to expand the products or services they provide, and 62% aiming to grow the amount of income they derive from trade. Forty-four percent of respondents also indicated that they are aiming to expand the geographic reach of their activities. The latter included expanding into more rural/remote areas, expanding statewide, as well as in a few cases expanding into national or international markets.

Figure Sixteen :
Aims of Tasmanian Social Enterprises: Next Three Years
Multiple responses permitted, n=91 social enterprises responding
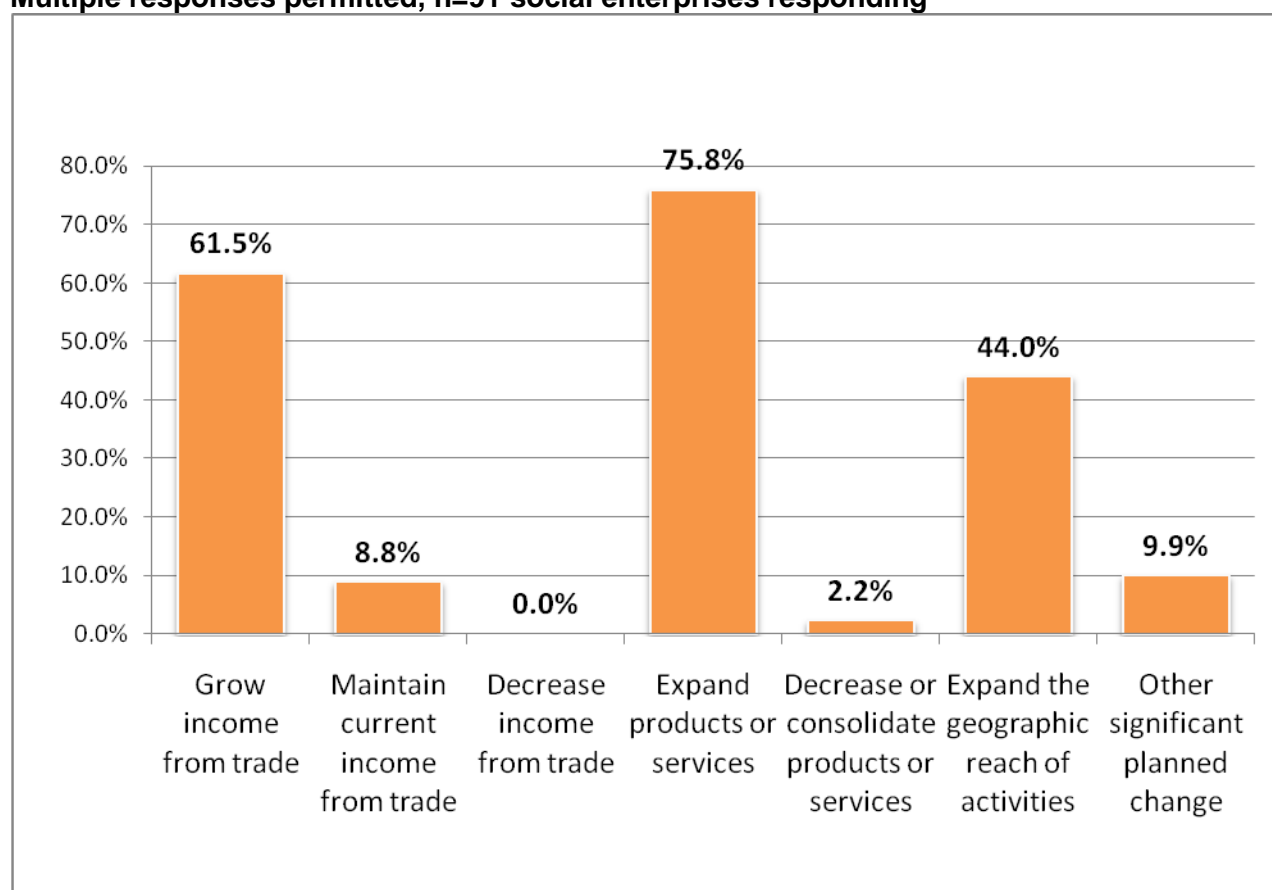
None of the respondents were planning to decrease the income they receive from trade. About 9% aimed to maintain trade at current levels. Only 2% were planning to decrease or consolidate the products or services they provide.

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Meanwhile, about 10% of respondents were aiming for other significant change over the next three years in addition to those mentioned above. These plans were also for the most part growth-focused. They included:

- Providing training or education activities for staff, community, schools, etc. In two cases, this included aspirations to become a registered training organisation (RTO);
- Growing income from other sources (grants, government funding, business investment);
- Growing new social enterprises;
- Developing new physical infrastructure (e.g. gallery space, shop front);
- Developing an Internet presence;
- Conducting research.

Respondents also emphasised that meeting their growth aims depended upon their ability to develop financial strategies to meet the costs of expansion. Quotes highlight that growth is an aspiration, but one that must be balanced with financial and organisational constraints and good business planning:

> 'I would love to grow what I am doing, particularly as the feedback I receive is so positive and the demand is growing. But this takes investment, bringing in support staff and that means higher costs.'

> 'As profit is not the motive for existence, as costs rise obviously we have to increase sales to keep viable. It is always a challenge to keep membership viable so expansion isn't an immediate consideration.'

> 'There are plans to introduce another 4 social enterprises within the state and to expand the current 3 we have to other areas as well. Overall the social enterprise space is due to expand considerably given current favourable economic business conditions, however what is important is that in any business, growth is only ensured once the business and its model has been successfully established and is able to financially support itself over a long term strategy.'

7. Social Enterprise Support and Development Needs

One of the aims of this study has been to begin a conversation to identify the support and development needs of Tasmania's social enterprise sector. The enterprises participating in the survey gave us rich data and insights on their views about the barriers to starting or growing a social enterprise in Tasmania, the particular challenges faced by their own organisation, and the areas which they see as priority in terms of future support and development to encourage the growth of the sector.

Barriers to Starting or Growing a Social Enterprise in Tasmania

Survey respondents were asked to identify the main barriers to starting or growing a social enterprise in Tasmania. A list of sixteen potential barriers to startup or growth was provided, along with an open-ended 'other' option.

The results indicate that a number of barriers are clearly at play in the sector; each barrier was ticked by at least 10% of responding enterprises, and a number of other barriers were also nominated in the open-ended responses.

The top barriers affecting the growth of the sector were clearly **financial**, with 'lack of grants for social enterprises' the most frequently cited, nominated by 48% of respondents, and 'finance availability' cited by 46% of respondents. 'Financial risk' was also strongly identified as a barrier to starting or growing a social enterprise in Tasmania, nominated by 44% of respondents.

Other frequently-cited barriers were 'finance affordability' (37%), 'availability of skilled workers and volunteers' (38%), 'marketing skills' (38%), and the 'nature of the market' (37%). (See Figure Seventeen).

As can be seen from Figure Seventeen, about a quarter of respondents identified 'other' barriers in addition to those on the original list. These barriers included:
- Fear /lack of confidence
- Finding advice and guidance on social enterprise
- Dealing with limited resources
- Availability and affordability of permanent physical space
- Recognition of the value of the service being provided
- Consistently finding volunteers with the needed skills

- Management of the organisation
- Risk of burnout
- Availability of appropriate insurance

Figure Seventeen:
Main Barriers Reported to Starting or Growing a Social Enterprise in Tasmania
Multiple responses permitted, n=92 social enterprises responding
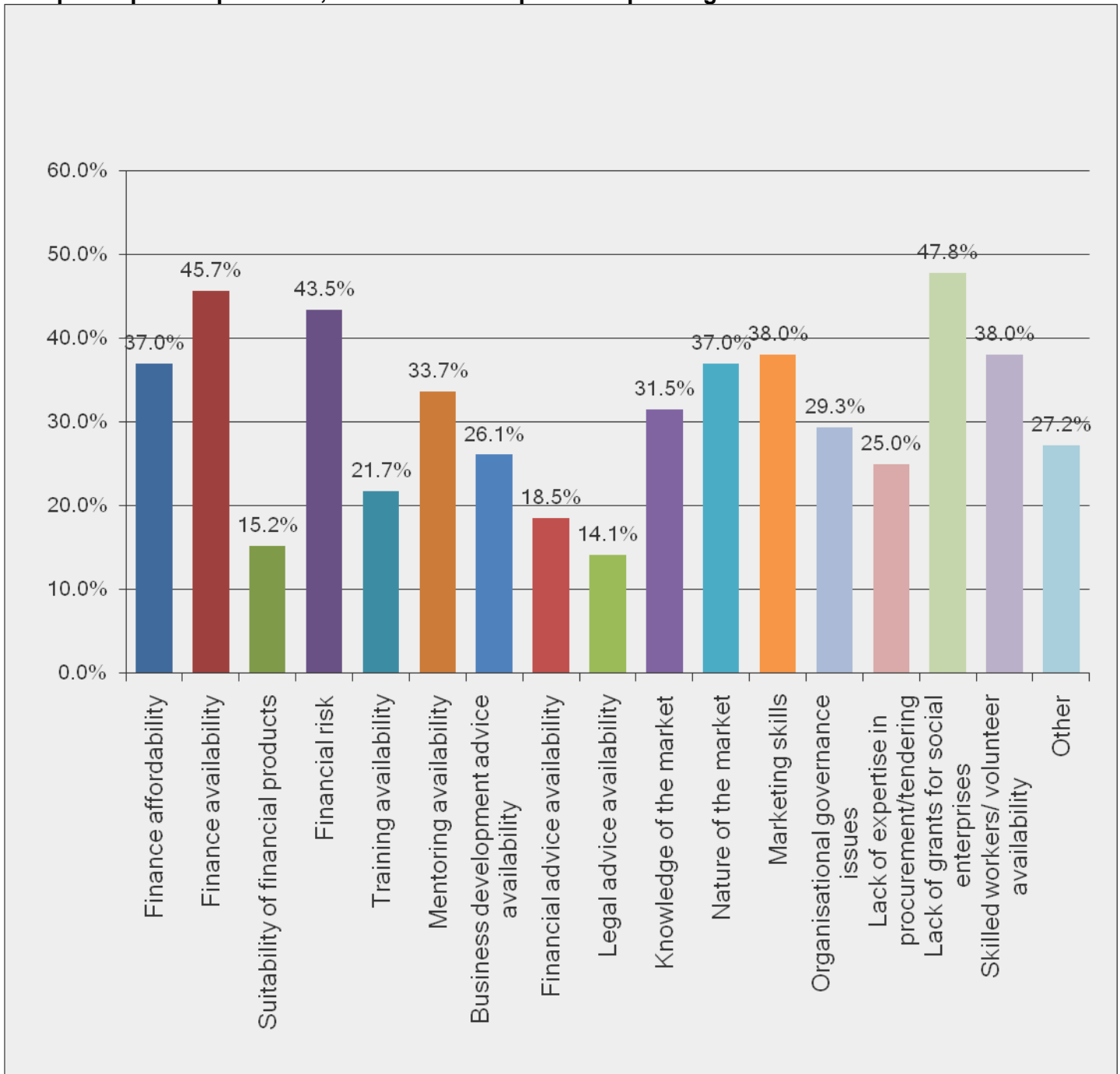
A number of respondents provided detailed reflections on these additional barriers. One of the key themes was about the fear and risk – both financial and personal risk – involved in starting a social enterprise:

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'Personal confidence. Fear and starting or not starting a business seem to go hand in hand. What is perceived as failure rather than experience and learning is what I believe prevents people from starting or growing a social enterprise.'

'A lot of it is very scary. Agreeing to invest personal capital into something that will potentially have no return....'

Taking a risk to provide new kinds of products or services as a social enterprise may in turn mean an uphill battle for recognition in the marketplace:

'We need for work in the field to be recognised as a valuable service that is being provided. I am running the business because I identified a gap. But it is not funded because I am the middle man (so to speak) – but without me it would not be happening.'

Another story that came through was that while information and support avenues for social enterprises may be available, newer social entrepreneurs did not necessarily know where to go. 'Finding people who can help you' as one respondent put it, was important to overcome barriers.   Another reflected:

'There is so much information out there, but very [few] people to hand hold with this process. [Social enterprise]is a different approach and one which can be frightening especially for non profits not used to risk taking and business. We need access to small amounts of money (under $30, 000) to help start ups, with no interest loans plus we need a team of dedicated social enterprise coaches to assist enterprises across the state.'

Observations on barriers also highlighted that while social enterprises share some characteristics with mainstream for-profits, there are also important differences, and these aren't always recognised:

'Barriers are similar to starting a for profit, however the revenue basis is often less and the capacity to get skills and advice limited by income.'

'Need more flexible funding options for business running social enterprise – we...don't make a profit.'

'[A key barrier is the] lack of volunteers capable of understanding and dealing with regulatory compliance issues. [A] young volunteer board [is] held to the same standards as experienced paid board members of for-profit companies.'

Respondents were asked to reflect on the greatest challenge their own organisation has faced. Eighty-three social enterprises provided detailed open-ended responses. These were then analysed by theme.

Figure Eighteen summarises these six themes, which are discussed in further detail below.

Figure Eighteen:
What is the Greatest Challenge Your Organisation Has Faced?:
Based on Thematic Analysis of Open-Ended Responses from n=83 Social Enterprises
(some with multiple themes)
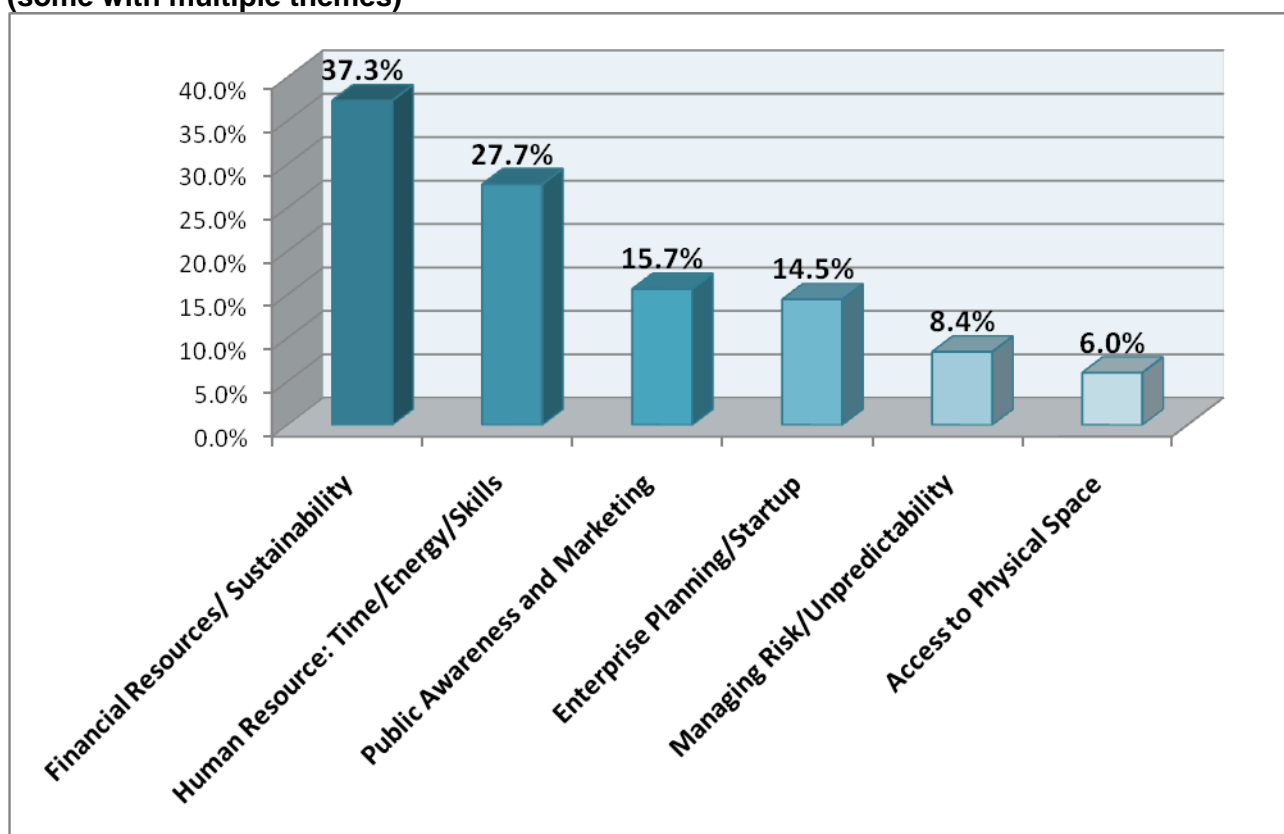
Financial Challenges

In line with the observations in the previous section, financial challenges were the strongest theme, with thirty-one social enterprises (37%) citing these as the greatest challenge their organisation has faced.

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Financial challenges can in turn be broken down into the following sub-themes:

1) *Challenges in identifying and accessing sources of funding*
The largest group of respondents wrote of challenges with accessing appropriate funding sources, both for social enterprise startup, and for enterprise development and expansion. This challenge was about identifying funding that would meet financial needs, and about being eligible and able to access this funding.

A number of comments illustrate that existing funding arrangements do not necessarily cover key areas of financial need, such as on-the-ground staff or infrastructure. Respondents also indicated that seeking funding can be a complex process, and that some social enterprises, sitting as they do between social and business models, may find themselves ineligible for mainstream funding:

> 'There is no question that the businesses are managed well, however securing funding is a major obstacle and the hoops can be a put off particularly if the workforce … is not consistent.'

> 'Access to Federal Funding (Innovation Fund) is too complex and requires a third party to partner in the submission (and they take a % for admin but don't do anything). Challenge is gov't bureaucracy and red tape.'

> 'We've tried to seek grant support several times and usually the informal status of the [enterprise] and the link with the café business has precluded us from eligibility.'

Some of the responses paint a missed opportunity to invest in innovative community-level work:

> 'Development of social and community programs is held back by availability of ongoing funding opportunities.'

> '… It is difficult particularly when there is no additional support. I think it would be great to also have access to short sharp funding of up to $5000 to support ventures. The people we work with can do AMAZING things and the low income often means they are more innovative with their approach and more willing to bring in partners.'

2) Challenges in managing costs and self-funding startup/ expansion
A second sub-theme within 'financial challenges' was the challenge of managing costs. Specific areas of cost that were mentioned were the rising costs of utilities, ongoing costs such as insurance and rates, and costs involved in expanding the business. In a number of cases, it was apparent that these social enterprises were self-funding their operations and expansion, and that this was creating financial strain:

> 'Need to earn money from other places to support the business which means less time to devoted to building the business.'

> 'Lack of money/time. Have to work part time to pay bills, leaving less time to develop.'

> 'Cost of having to relocate when the Business expanded to meet increased sales. No property assets to borrow money to relocate, very little financial support from the Government to help relocate and the fact [that] we would have lost our biggest clients if we did not relocate and would have gone broke.'

Another social enterprise noted that the startup process had been: 'Very difficult. Just a lot of costs. '

3) Loss / reduction of income from existing funding sources, and concerns about the sustainability of funding models
The final two areas of financial challenge were the loss or decrease of existing funding sources from government bodies or fundraising, and overall concern about the long-term financial sustainability of the enterprise. Some social enterprises expressed concern that government funding was not covering the costs of providing services or that funding was being cut back. There was also concern that investors and contributors to social causes had numerous other calls on their resources, and a recognised need to explore new funding models:

> '[Our greatest challenge is] generating sufficient funds from fundraising activities across a highly competitive market that is saturated with similar calls for support. While we could continue at current levels of revenue, we have a growth agenda and so need to extend our success in building revenue.'

> 'We want to look at different models that can support what we are doing, but have been very much alone....'

> '[Our greatest challenge is] planning a sustainable future, enabling us to continue to provide a free and timely counselling service.'

Overall, while a number of different themes were identified within the broad area of 'financial challenges', the greatest challenge that many social enterprises had faced was linked to their access to funding (whether grants, fundraising, government/industry investment, self-finance or other forms of finance) and the challenge of ensuring that the enterprise had the ability to cover both its operating and expansion costs sustainably.

Human Resource Challenges

The second largest group of challenges social enterprises had faced were those related to their human resources: both paid staff and volunteers, as well as the enterprise's leadership. Human resource challenges were highlighted by 28% (23) of social enterprises in their open-ended responses.

Human resource challenges experienced by these social enterprises fell into the following categories:

1) *Availability and skill levels of staff and volunteers*
The attraction and retention of staff and volunteers, particularly those with good skills, was the stand-out issue here. A key challenge was having enough skilled and reliable workers to be 'able to meet the demand', coupled with the problem of not having enough volunteers (or volunteers with limited time availability). Maintaining commitment from staff and volunteers over time was also an issue.

> 'Being able to provide staff to meet the demand.'

> 'Understanding from employees of benefit and need for reliability/ impact on viability.'

> 'Lack of volunteers, lack of suitably qualified staff.'

> 'Not enough volunteers keen to take a leadership role!'

2) *Workload, fatigue and burnout*
Maintaining 'personal energy levels' and avoiding 'volunteer fatigue' were significant concerns where demand and workloads are high. Managing workloads and fatigue was an issue.   These observations in turn related to

concerns about maintaining strong leadership, and the need to 'avoid leadership burnout'.

> 'Time availability of committee members and volunteers.'

> 'The greatest challenge is not to burn out or lose the enthusiasm. The clients and ideas out there keep you fresh and passionate.'

Public Awareness and Marketing Challenges

A third set of challenges, cited by 16% of respondents, were related to raising public awareness and gaining recognition in the community and/or the marketplace. Often these challenges were about a lack of community involvement in, or understanding of, the organisation, its activities, or the value of these. These challenges included:

1) Attitudinal barriers

Some social enterprises cited a lack of public/community awareness of the nature or value of their contribution, whether in social or monetary terms. Some social enterprises specifically articulated that they felt their services were 'undervalued' or that their value was not adequately recognised:

> 'Getting people interested in cultural development. Getting government support to build social strength. Small and provincial attitudes stop strong and potential development.'

> 'Being recognised as professionals by user-groups who take advantage of our programs but take the fact we offer our services free of charge for granted, and do not credit us appropriately when springboarding off our programs.'

2) Marketing challenges

In other cases, the challenge of increasing public awareness was articulated as the need to 'become known', 'get the message out', and to invest explicitly in the marketing of the social enterprise's products and/or services:

> 'We are a group of women who meet for self development and improvement ...[W]e still have the problem of advertising our services and encouraging other women to attend to learn what we're about.'

‘Reaching all audiences and building trust within our non-traditional client group so that they use our services. Marketing our products is also a major concern as getting the message to all Tasmanians is difficult.’

‘Public understanding of the kind of service I provide – which is about marketing really.’

Planning and Startup Challenges

For 15% of respondents, their key challenge revolved around the process of starting a social enterprise and planning for its future. Some of these observations related to business skills development needs more generally, others to a need for social-enterprise-specific advice and support

1) *Business Know-How*

A few respondents cited challenges that related to business skills and ‘know how’. These include challenges of making realistic decisions about what can and cannot be done, having good ‘business know how’ (and coping with a lack of experience), and setting up good financial models, governance structures and management habits. These are particularly of concern when changing business models or when trying to meet a big area of social need:

‘Finding time to do the 'boring' bits and remembering to write things down in my diary.’

‘Too many ideas! There are only a few of us, and the hardest thing has been to effectively use our time and resources toward a select few projects. Our area needs so much help, we tend to want to try and do everything at once.’

Some enterprises also cited specific challenges with managing regulatory and taxation compliance issues.

2) *Social Enterprise Support*

Other organisations specifically noted that it had been a challenge not having a locally based organisation to support social enterprise:

‘As we started a 'social business' I would have loved (and would still love) advice regarding how to set up a business in a way that offers financial support to employees and is at the same time able to access

funding and grants which support the nature of the business. I have found it difficult to run a 'social' business, keep afloat and do the work you really want to be able to in the community.'

Other Challenges

In addition to the challenges cited above, other important challenges highlighted by social enterprises included managing risk, particularly risks related to weather (in the agricultural sector), natural disasters (e.g. flooding) and economic risk (working in a risk-adverse sector, working in a fluctuating economic environment).

'[D]ecline in fundraising $ due to natural disasters over the past 4-5 years'

One organisation specifically highlighted that lack of land tenure security was a source of risk that made it very difficult to attract investment.

Equally, access to physical space was an issue for several social enterprises:

'Availability of permanent space in which to operate. [Our social enterprise] has been relocated 11 times in the last 16 years.'

Access to space from which to work, and the affordability of suitable space in which to conduct their operations, was an issue for several social enterprises in the survey.

Sources of Support for Social Enterprises

When reflecting on these challenges, social enterprises were also asked, 'Has assistance been available when you needed it?' Of those who provided a response, about half (16) indicated that they had received help, while a similar number (13) indicated that they had received no, or limited, assistance.

Three additional respondents indicated that they had not asked for assistance, or it had not been needed. The remainder of survey respondents did not choose to indicate whether or not they had received assistance when needed.

Of those who observed that assistance had been available for them, some specifically indicated the source of this assistance. The most common

sources of assistance were **informal assistance**: particularly broader organisational networks (including local businesses, industry partners, university, councils and national social enterprise networks) and individuals, as well as internal advice and improvement processes:

> 'I was lucky this business had a lot of good will and I have been supported by amazing people.'

> 'On loss of funding, internal assistance and good governance ensured [the] company's survival.'

 Grants by government and philanthropic organisations were also mentioned as important sources of support:

> 'We have managed to procure a couple of Education and Training Gov't grants for which we've been most appreciative.'

> 'Changing our business model to an online enterprise and forming closer ties with industry partners to achieve this has been the most significant change in our organisation's history. Support from the Australia Council was essential in allowing this growth and evolution to take place.'

> 'We have been given great support from individual grant providers in writing applications and are very positive about the future.'

Assistance with **marketing and management issues** was available, but at a **cost**:

> 'Yes we had to fund specific assistance to manage our growth.'

> 'Assistance [is] available but it also costs.'

Meanwhile, there was a sense that some assistance available was good but **did not go far enough**:

> 'Some assistance [was received] from department of fair trading, but there seem to be limited scope for reducing burden of responsibility. Need more assistance to explain not just how to be compliant, but why it is important e.g. insurance, auditing requirements, taxation, employment law etc.'

Equally, among those enterprises that indicated assistance had **not** been available when they needed it, it was noted that 'assistance is always minimal'. It was noted that there is little or no assistance with **social enterprise startup, or finance for startup/development**.

> 'No help with obtaining grants.'

> 'No I haven't found any assistance without having to spend lots of money.'

> 'Limited assistance; we have tried to engage with government paid arts and tourism fraternity; both are reasonably impenetrable; practitioners give us total support; [we are] often asked, not by practitioners "of course, you got a grant for this?" we did not.'

Overall, while some sources of support for social enterprises are clearly available, these responses suggest that they are limited, nor are they for the most part targeted to the needs of social enterprises. One of the main sources of support indicated here is informal support accessed through personal and organisational networks. Government and philanthropic funding play an important role where available. Meanwhile, other forms of business support and advice are available, but only on a consultancy or fee-for-service basis.

These points suggest that there is clearly scope for expanding the level of assistance available to social enterprises in Tasmania. Currently, the only formal assistance program for Tasmanian social enterprises is a loan fund. Yet given the observations above about the risks and even fear involved in starting and expanding a social enterprise, it is questionable whether loans are necessarily the best vehicle for providing support. While loans may help meet the financial needs of some enterprises, the barriers and challenges identified suggest the need for more varied forms of support. The following section explores some ideas from the social enterprises themselves.

Encouraging the Growth of Social Enterprises in Tasmania

Respondents were asked to identify the top needs or opportunities that they believed could remove barriers and encourage the growth of social enterprises in Tasmania. Eighty-one responding enterprises provided detailed, qualitative, open-ended responses.

Analysing these qualitative data highlight five areas of potential support identified by those within the sector. These are:

1) Better financial assistance for social enterprise;
2) Raising community awareness of social enterprise and its contributions;
3) Stronger collaborative relationships with government, not-for-profit and private sectors;
4) Learning, knowledge-sharing and hands-on help; and
5) An enabling legal and regulatory environment

Many of these responses were quite detailed, and a number suggested specific action that governments could take to enhance support to the sector. A selection of quotes from each of these five areas follows:

Support Area #1: Better Financial Assistance
Tasmanian social enterprises identified a need for more, and more appropriate, financial assistance for social enterprise. The suggestions included:

'Start-up capital.'

'An affordable way to advertise.'

'Affordable locations for social enterprises to work from.'

'Grants-NOT LOANS-to support enterprises. Helping the deliverers to share the risk.'

'Increasing funding opportunities.'

'[F]unding opportunities need to meet a need, rather than force organisations to find/initiate a programme which will fit the criteria'.

'A better more flexible source of funding without the added hoops to jump through.'

'Improved funding and grant programs for infrastructure and equipment.'

'The lack of finance and risk averseness of banks and financial institutions to support social enterprises more.'

Support Area #2: Raising Awareness of Social Enterprise
A second key area identified was about changing attitudes, increasing, understanding, and overall raising awareness of the value of social enterprises in the broader community, including in government and in the private sector:

> 'A change in the hierarchy of value. The last 20 years has seen an absolute focus on profitability, rather than benefit to the community.'

> 'Greater government support. Greater private sector support. Greater media and widespread understanding of the importance of social enterprise for healthy communities.'

> 'Government support in purchasing products from Disability Enterprises. (Now can be done without Tenders). Recognitions that these services are truly employment opportunities for people with disabilities not Sheltered Workshops. Promotion from as early as school age of worthwhile careers in Australian Disability Enterprises for people with disabilities.'

> '[R]ecognition of non-incorporated organisations, such as businesses, as valuable contributors to their community in the social context; creative ways to encourage communities to support local businesses/social enterprises….'

> 'Recognition by State Government of value of unfunded rural NGOs'

> '…[P]roviding information about the social enterprises out there and what they are doing.'

> 'Acknowledgment from the government that the social enterprise space is valid and commercially viable to the economy.'

> 'Give as much attention to social enterprise as there is to economic enterprise.'

> 'Commitment from the Tasmanian Government to financially support an ongoing program that profiles, promotes, educates and informs about social enterprise.'

Support Area #3: Stronger Collaborative Relationships Across Sectors
A third key area of support to encourage the growth of social enterprises in Tasmania was the need to leverage opportunities for working collectively across sectors:

> 'Communication and partnerships between existing organizations…. We would love to see both the NFP and profit sectors develop partnerships (with common interest) to see social enterprise as central in our state.'

> 'Collective marketing between such businesses, building on the collective strengths of our values and goals and using this to our advantage via collaborative projects and marketing opportunities.'

> 'Local Government taking a more enabling role in helping social enterprises to establish and flourish.'

> 'Government vision and leadership for innovation and collaborative ventures.'

> 'Government and Departments to 'trust' the not for profit sector.'

> 'Stronger ties/ relationships between gov't/business/community.'

Support Area #4: Learning, Knowledge-Sharing and Hands-On Help
There were numerous calls from those in the social enterprise sector to have opportunities to learn, network, develop their skills (including but not limited to business management skills), and share knowledge with each other.   The needs identified included training, professional development and mentoring, and practical hands-on assistance:

> '[S]upport, not necessarily only financial – e.g. low cost, accessible, relevant professional development for operators, especially in rural areas.'

> 'Support in writing grant submissions in the language required to succeed. Support in gaining recognition of our organisation and the benefits we have to offer to the community.'

> 'Federal or State Government providing more direct support and training to social enterprise sector.'

'[O]rganisational assistance especially in the set up stages; networking and learning from each other – not reinventing the wheel.'

'More opportunities to discuss social enterprise ideas – mentors with experience and time available to talk through the difficult times especially doing a business plan. Knowing the stages and how to progress to the next stage.'

'People who can help on the ground, to either help you get training and to get the product out there better.'

'Support: having access to REAL people who can be accessed. Not mentors, but people who are willing to roll their sleeves up. Perhaps this could be a statewide team funded by the government who can be called in to help at times.'

'Ensure those seeking to enter this area are sufficiently aware of and understand how to access the support available to facilitate their activity.'

Support Area #5: An Enabling Legal and Regulatory Environment

Finally, a few organisations made observations about how the larger legal and regulatory contexts and processes could be made easier for social enterprises:

'[M]ore proactivity from local councils, especially concerning planning permission and explanation of requirements, etc. (assistance rather than obstacles and restrictions, as experienced personally)'

'Reduce compliance issues.'

'Company structure similar to the 'community interest company' structure in the UK. This would allow SE firms to better leverage both public and private funding and may also provide more opportunities for motivating executive staff/volunteers, because performance could be linked to financial reward.'

Overall, these thoughtful responses to the question of support needs for Tasmanian social enterprises, suggest numerous ways in which to respond to the barriers identified earlier in this chapter. These open up fertile

ground to explore and co-develop relevant ongoing support mechanisms for the social enterprise sector in Tasmania.

8. Conclusions: Where to Now?

The Tasmanian Social Enterprise Study has taken an important step toward making the Tasmanian social enterprise sector visible. These survey results and the stories that follow in Chapter Nine have provided an understanding the sector's diverse profile, and a first glimpse of the impressive range of its contributions.

At the same time, the findings of this study clearly indicate that the current resources provided to social enterprises by government and other organisations do not adequately support the needs and growth of this sector in Tasmania. There are opportunities to recommend ways in which government and other players can best support this diverse and committed sector to expand the range of contributions it makes to the social and economic life of the state and its people.

Survey respondents indicated five key areas that need to be targeted to expand and grow the sector:
- Suitable financial assistance for social enterprise;
- Raising community awareness of social enterprise and its contributions;
- Stronger collaborative relationships with government, not-for-profit and private sectors;
- Learning, knowledge-sharing and hands-on help; and
- An enabling legal and regulatory environment

While the final point likely represents a longer-term project at national level, there are a number of initiatives that can be taken in the short to medium term here in Tasmania to respond to the first four points. The following recommendations are directed both to government and to the broader community, to respond to these identified issues and opportunities.

- ***Recommendation One: For the Tasmanian Government to provide a more diverse range of funding options appropriate for Tasmanian social enterprises of various sizes and growth stages, potentially including small-scale seeding grants and no-interest loan options.***

The greatest challenge that many social enterprises have faced was in financing their startup and expansion sustainably. Some social enterprises,

sitting as they do between social and business models, find themselves ineligible for mainstream funding sources. In some cases social enterprises are self-funding their operations and expansion, which is resulting in financial strain.

Respondents indicated a range of financial options that would better support social enterprises. These included start-up capital, affordable accommodation options, flexible grants program, improved financial backing from banks and financial institutions designed to support social enterprises.

- ***Recommendation Two: For the Tasmanian Government to financially support an ongoing program that profiles, promotes, educates and informs about social enterprise, in order to develop a deeper awareness of the role of social enterprise and facilitate collaborative opportunities with the sector.***

This recommendation responds to the second and third areas of identified need: raising awareness of, and relationship-building with, social enterprises. The need to raise awareness of social enterprise is recognised throughout the international social enterprise sector.   The Tasmanian data suggest that government, industry and the community need to recognise that many social enterprises operate in the open market and compete alongside traditional businesses while also generating important social and economic benefits.   The nature of these benefits needs to be acknowledged, and collaborative opportunities developed in response.

These observations highlight the need to undertake proactive work to increase understanding about the nature and impacts of the state's social enterprise sector. The Tasmanian Government is well positioned to take a lead in awareness raising about the value of social enterprises and to explore opportunities for government to learn from, partner with, source products and services from (ie social procurement), and otherwise work with the sector to achieve mutual aims.

- ***Recommendation Three: To explore mechanisms for increased private and philanthropic investment in social enterprise, to increase social enterprises' access to capital and/or to lower key costs such as accommodation and insurance.***

Recommendation Three responds to the need for better financial assistance for social enterprise, as well as the opportunity for new

collaborative relationships to develop across sectors to meet this need. Mechanisms to financially support social enterprise could potentially take a range of forms, such as social enterprise 'Pitch Clubs' to attract 'angel' investors, a philanthropic fund to support social enterprise startup and expansion, Community Development Finance Institutions (CDFIs), targeted social enterprise financial instruments developed in collaboration with private-sector finance providers, and other financial institutions and instruments to support social enterprise.

- ***Recommendation Four: To establish a central web-based hub to provide information about social enterprise in Tasmania, networking opportunities for Tasmanian social entrepreneurs, and links to learning resources, networks and support organisations in Tasmania, interstate and overseas.***

Recommendation Four responds to the need to raise the profile of social enterprise as a sector as well as to increase knowledge-sharing opportunities for Tasmanian social enterprises. The Tasmanian Social Enterprise Blog that was established as a part of this study received over a thousand visits in the two-month project period; this platform could be further developed to upload profiles of Tasmanian social enterprises, available evaluation studies, other publications, learning resources and links as well as discussion board and bulletin board facilities to stimulate networking and knowledge-sharing among social enterprises in Tasmania. Developing an information and communication hub specifically for Tasmanian social enterprise would help to raise the profile of the sector in the short term, while facilitating the development of sustainable networks among social enterprises in the state.

- ***Recommendation Five: To pilot a targeted development program for Tasmanian social enterprises, responding to the identified need for 'hands-on assistance' and linkages particularly in the early stages of starting a social enterprise.***

Recommendation Five responds to the articulated need for learning and skill development as well as hands-on help. Finding services and people to assist was a source of frustration in the sector. The most common sources of assistance were informal assistance: through organisational networks and individuals, as well as internal advice and processes. There was no indication that existing business service providers were being utilised to any great degree, despite the presence of government-funded organisations

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whose mandate is to work with small businesses in Tasmania. This suggests a need for more targeted support for social enterprises. Overall, the results of this study not only provide a first picture of social enterprise in Tasmania, but they highlight a genuine willingness and commitment from social enterprises to develop partnerships with business, government and not-for-profit sectors. Many social enterprises, working as they do between traditionally 'community sector' and 'private sector' industries, recognise the benefits to be gained from collaboration across traditional boundaries. These findings and recommendations indicate abundant opportunities to develop proactive partnerships and initiatives, so as to build capacity in the Tasmanian social enterprise sector, lower barriers to growth and development, and generate even more innovative social and economic outcomes in the future.

9.   Stories from Tasmanian Social Enterprises

In this final chapter, three Tasmanian social enterprises share their stories. These stories permit us the privilege of an up-close look at the experiences and accomplishments of these three enterprises.

The areas of work of these social enterprises are very different, yet some common themes come through: about passion for the work and the people they work with, about the artful blending of social purpose and market savvy, and about the commitment to quality products and services and strong partnerships.

The profiles also describe some of the many areas where social enterprises are making a contribution in Tasmania: in employment generation, education, training, local food, environmental conservation, and social empowerment.

Overall, these stories give us rich insight into the processes involved in creating innovative and proactive responses to 'issues': replacing 'issues' with opportunities.

SOCIAL ENTERPRISE PROFILE

BIG BICKIES

LAUNCESTON, Northern Tasmania

Food production business

We are a social enterprise because….

As an organisation we work with a range of people with support needs and it was identified that there was a gap in opportunities for some groups of people in the community. What we discovered within the employment sector of Northern Tasmania was that there were not a great or vast range of employment opportunities available to people with support needs who were either wishing to re-enter the workforce, entering the workforce for the first time or people wishing to gain new skills. As a result of our three Social Enterprises we have made some inroads into the delivery and employment opportunities for our jobseekers in CHOOSE employment's Disability Employment Service (DES), and wish to continue the good work that was started eight years ago.

We have chosen to go down this road (as opposed to just being a business or a conventional non-profit organisation) because….

As an organisation we firmly believe that under the banner of Social Enterprise we are able to deliver fully on what is required both civically and commercially in this space. Also as a Social Enterprise we are able to focus on the objectives and outcomes that we have set for ourselves. Employment in our Social Enterprises is not necessarily about learning to make a coffee, how to make a biscuit or how to cook a slice, it is about gaining those valuable key employability skills. As a Social Enterprise we can help to develop individual outcomes that have greater impact within the community and as Social Enterprises are gaining momentum we can ensure we will be more easily understood by those not working in the space about what we are able to achieve and the overall benefits Social Enterprises present to the broader community. Big Bickies works in a collaborative manner and this enables us to create more employment opportunities for people with support needs, assisting in improving their quality of life with an ability to earn income, learn life skills and become more independent.

Our start-up story:

Started in 2002, Big Bickies is a Social Enterprise that operates a self funding, not for profit commercial kitchen producing a beautiful selection of biscuits, slices, birthday and celebratory cakes as well as specialty product for Christmas, Easter and other specialty calendar events.

Our biscuits and specialty products are manufactured using local quality fresh ingredients that are free from preservatives and artificial additives. Our specialty products range from the luxury decadent chocolate to health conscious and our prices are highly competitive in the open market.

What individual skills did you use and what skills did you need to bring in?:

Big Bickies is supervised by a qualified patisserie chef and is staffed by 20 people with workplace support needs who are employed under the appropriate award conditions. Our staff are trained in key aspects of production and learn literacy and numeracy tasks such as correct weight and measure, timing and are provided through employment opportunities to enhance their visual and auditory senses which are key components of working. After basic training in work skills, our employees may decide to seek work in another industry. The Big Bickies kitchen offers a safe and fully supported training environment where our staff have the opportunity to learn about the workplace, find their feet and prepare to enter the workforce. Many previous employees from Big Bickies have easily made the transition into open employment.

The skills that we need to bring in are the expertise to still develop and produce our beautiful product whilst still maintaining our community and civic focus. This is where the balancing act between being commercially sustainable and community relevance is paramount to the success of our Social Enterprises.

Where did you find these skills?:

As an organisation, we partner with a number of groups that help us to achieve our objectives in both areas of commercial and community operations, these organisations and groups are identified early on in the stages of business growth or development and the relationships that we develop are extremely important to both of us long term. We see the collaboration with local community as being another step to solidifying our space within the Social Enterprise area and we will continue partnering with like minded organisations, community groups and local government for the future growth and creation of long term sustainable benefits.

What is missing to support you?:

Growth is always difficult when you are faced with a finite amount of resources and the ultimate aim is to be able to grow and increase the opportunities available. Also, in a depressed employment market (especially for those experiencing significant barriers) it is challenging to find employment opportunities in the open community for employees to transition through our Social Enterprises.

Where we are now:

Having recently won awards at the fine Food Fair in Hobart for our Melting Moment in the biscuit category and a bronze for our Pecan Pie in the small cake category, we are delighted that such a small yet relatively unknown player in the market achieved such success against our more esteemed competitors. This recognition just shows what can be achieved when business is able to think outside of the square.

We have grown and evolved as a business and with the appointment of a fully qualified patisserie chef we have seen our stable of products grow and evolve to suit our new business. We have also increased our product ranges and our service to ensure we maintain and grow our portfolio.

Our current plans are to increase production to allow for further commercial and employment growth and we are planning to purchase some equipment in order for us to achieve these aims.

Why our work matters:

There are many benefits in buying a Big Bickies product and these benefits are two fold, not only are you supporting a great social enterprise that produces locally and beautifully made produce, but your purchase also supports the work and efforts made into supporting employment opportunities for members of our community that are unable to secure employment for themselves or who have a current barrier to employment. Many times we are told by our employees how much they enjoy working at Big Bickies and we are constantly humbled by the level of commitment our employees show to us whilst working at Big Bickies.

The **hardest thing** has been….

Creating new opportunities for the business to keep us relevant and create further income for greater employment. Also to communicate to the broader community how Social Enterprises can positively impact on the community.

The **most important thing** we have learned….

That we have and will, continue to make a difference.

Our **dream** is to…

See Big Bickies growing in a size, where we can make a difference in the lives of people through being a major player in the production space and where we also can be a significant employer within the whole state.

OUR ADDRESS

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SOCIAL ENTERPRISE PROFILE

BONORONG WILDLIFE SANCTUARY

BRIGHTON, Tasmania

We are a social enterprise because for us, profit is a means to an end. To paraphrase Ray Anderson, Interface Carpets CEO and social entrepreneur, some businesses exist to make a profit, others make a profit to exist. We run a successful tourism enterprise which provides eco-education and experiences for 30 000 guests each year. Our skills and the money generated through the Sanctuary allow us to proactively address problem areas in our surrounding environment and communities. Part of our mission is to facilitate community solutions to community problems. Bonorong is an open house and we try to provide pathways for all Tasmanians to become involved in conserving our unique natural heritage. At the heart of this is a belief that in the same way as an individual can devote their existence to doing good, so too can a business.

We have chosen to go down this road because we don't believe in an economy which is rigidly divided into public, private and charity. Our mission is essentially charitable. However we share none of the traditional mistrust that charities have of government and private business (ie. "they're the ones creating the problems and we pick up the pieces"). In fact we want to work freely and create partnerships across all sectors. Being a private business allows us to operate within the most deregulated part of the economy. This allows us to innovate independently; we can try, fail and try again, all at our own cost. The healthier the business is, the more we can achieve. Conversely, the more we achieve, the better for the business.

Our start up story is about passion (possibly tinged with obsession). As a seven-year-old, Greg Irons came to Bonorong for a birthday party and told his mother he would own this place one day. At twenty-seven years old he has achieved this dream. Many people would rest on this achievement for a while and consolidate the business. However for Greg the park is simply a tool. In the eighteen months since he assumed control, Bonorong has changed from a traditional, three-decade-old wildlife park to an innovative and active wildlife sanctuary. The Sanctuary is focused on giving back to the Tasmanian environment, rather than simply being a showcase. This semantic shift symbolises our move from private business into social enterprise. The change was already well under way before Kylie Eastley suggested to Greg that he was practising social entrepreneurship. A concept none of us had heard of before. Since then we have adopted this idea wholeheartedly as it describes perfectly our identity and mission.

What individual skills did you use and what skills did you need to bring in? Where did you find these skills? The shift into social enterprise has challenged us all to diversify our skill set. We are now devoted to projects which range far beyond the normal operations of a wildlife park. We are lucky to have a devoted and long serving team who are all engaged with the social enterprise message and have been prepared to take on extra responsibilities. One of our focuses has been on harnessing community support to make projects possible. Volunteerism is a strong impulse and sometimes just needs a pathway to channel it. This has the added benefit of getting the community members and schools involved in the conservation effort. On top of this we have created partnerships with government and non-government organisations such as DPIPWE, Green Corps, Conservation Volunteers Australia and the Tasmanian Polytechnic. These partnerships broaden the scope of what we can achieve.

What is missing to support you? We believe that with the facilities and expertise available to us we are doing things which would be incredibly expensive to set up through government. However while doing this we also have to meet the everyday demands of running a business. What seems to be missing in the social enterprise field is recognition that businesses can be social enterprises as well. To be officially recognised as a social enterprise would help us to create new (and strengthen existing) community and government partnerships and in seeking sponsorships for our projects.

Where we are now: We now run Tasmania's only 24 hour wildlife rescue service, the FOC Wildlife Program. Last year we provided free wildlife rescue training to 235 adults and more than one thousand school children at nearly 40 Tasmanian schools. The FOC Program responded to more than 1000 animal emergencies in its first 9 months of operation. This is a service that Tasmania has never had before. Our off-display rehabilitation area is constantly full of animals we are helping recover from injury or orphanage. These animals often end up back where they belong, Tasmania's wilderness. We are investing large amounts of capital in expanding our disease-free Tasmanian Devil breeding program. Our enormous new devil enclosure will open in May. We have partnerships with skills providers which allow people to train at Bonorong and learn vital work skills to improve their lives. The Bonorong Internship is a work placement we have developed in conjuction with the Tasmanian Polytechnic. The experience this provides is unique in Tasmania and is a stepping stone for work in the tourism and animal industries. Every Monday and Tuesday a team of young unemployed people come and help us build the infrastructure which supports our work. This is a summary of what we have achieved in the last eighteen months. We have much bigger plans.

- In the near future we aim to have the FOC Program operating statewide. Training and transport hubs would be created thoughout Tasmania, however the coordination would stay with Bonorong. Whether an animal is in Moonah or Marrawah we will be able to find a nearby volunteer to provide help.

- Our devil program is growing and we are working in partnership with Conservation Volunteers Australia to make it huge. We envision a large, quarantined and off-display breeding area which can house up to 100 devils. We feel very strongly that it is our responsibility to use our expertise to assist in saving this most remarkable of creatures.

- Our schools program will be expanded to provide a curriculum for Tasmania's teachers on native wildlife. We believe it is worrying that our children know more about lions and elephants than they do about our own native animals.

- We are already drawing up plans to expand our rehabilitation centre to cope with increasing animal traffic. This includes a seabird rehab area. This is a service which nobody in Tasmania is providing at the moment.

- Our relationship with the Polytechnic is bearing fruit and we look forward to an ongoing and burgeoning partnership with them. We are in discussion with them about making Bonorong into a satellite campus which provides basic and advanced training in zookeeping and tourism.

- We are working with other tourism businesses who also have a social enterprise mission to create packages for tourists who want to support the work we are undertaking. The tours would be focused on what is special about Tasmania's environment and why it attracts businesses who work actively to protect it.

Why our work matters: Our work matters because Tasmanian life is intractably linked with our environment. There are obvious conservation benefits in running rescue, rehabilitation and breeding programs. However what is far more important is the way in which we are involving Tasmanians with their environment in an active way. Our message to them is "You Can Help". In this way we see families and communities creating stronger relationships through wilderness. This is the essence of what we do.

The hardest thing has been keeping the business up to speed with our ambitions. We are seeking to tackle some big projects and the business needs to be able to fund them.

The most important thing we have learned is that nothing is out of reach. If something has felt right, or we have really wanted a project to work, it has happened. However this has only been possible because we have had the business as a base to work from. No social enterprise can survive without a modicum of financial security. We have discovered that by becoming a sanctuary our product has improved. We can now tell our guests that they are contributing to all these worthwhile projects. This leaves them with a glow of altruism. They feel as though they have made a difference. This in turn has reflected in increased business. We have been doing well by doing good. Social enterprise has given us the tools to achieve things that were beyond us when we were a normal business.

Our dream: Our dream is to be doing what we are doing right now. There is so much potential for us to make a difference that it is hard to boil it down to one overarching goal. One longer term plan for us is to have a wildlife hospital on-site, complete with veterinary service. We believe we have the business plan to achieve this. It is something Tasmania desperately needs and we think there is little likelihood of it happening any other way. We aren't dreaming anymore, we are making plans.

Director, Greg Irons and Manager, Karl Mathiesen

SOCIAL ENTERPRISE PROFILE

WALKABOUT INDUSTRIES

GLENORCHY Tasmania

Walkabout Industries is a business division of OAK Tasmania; a community not-for-profit organisation that improves the lives of Tasmanians with disabilities by providing a range of employment, training and community services throughout Tasmania. Walkabout Industries produces branded potting mix; provides paper recycling and secure document destruction services, and bottles a wide-range of solvents under the 'Walkabout' brand name.

We are a social enterprise because….

Walkabout Industries offer genuine certificate-level training and employment opportunities (real paying jobs) to Tasmanians living with a disability. This provides Walkabout's supported employees with a sense of purpose, the ability to develop life-long friendships and skills, and encourages them to become equal and active members of the community.

What makes Walkabout Industries truly unique is that any surplus derived from its business activities are reinvested into the OAK Tasmania community, to fund capital purchases and run programs and services for others in the community who are disadvantaged. Not content with providing innovative and practical responses to social and economic demands, OAK Tasmania is fulfilling its environmental mission by implementing a sustainability strategy across the organisation.

We have chosen to go down this road because….

Walkabout Industries exists solely for the purpose of providing genuine employment and training opportunities to Tasmanians living with disabilities. Walkabout's supported employees were the reason the enterprise was established in 1971, and they remain the main focus of why Walkabout exists today.

Our start-up story:

A small group of dedicated parents formed a committee called the Glenorchy Branch of what was the Retarded Children's Welfare Association in 1971. The groups aim was to raise funds for a facility in Hobart's Northern Suburbs to care for the vocational needs of their children. This

followed on from the success at Oakdale Workshop (now Oakdale Industries and part of the Oak Tasmania family), that was established in 1964 and was already running at capacity.

The inspiration behind establishing a facility in Glenorchy was Les Thirgood, a businessman and father of a child with a disability. The Glenorchy Branch started 'walkabouts', the forerunner of today's fun runs and walkathons, and after which the Glenorchy facility became known. The Branch purchased a property in Clydesdale Avenue in Glenorchy and provided work for 11 young men living with intellectual and physical disability. In 1972, larger premises were needed and a new building was opened. Walkabout now employed 19 young men aged between 16 and 32 who were bottling solvents and detergents under the Walkabout brand. In 1973 a new sewing section was established, and a year later Walkabout employed 53 trainees and 10 supervisory staff.

Under the management of Peter Blackwood, Walkabout became a viable business enterprise by supplying supermarkets, schools and government departments throughout Tasmania with its range of solvents and detergents. The sewing section expanded and produced a range of uniforms, dustcoats and slacks for private business and government. New recycling activities were established employing nine people, and included washing bottles and recycling newspapers and old wool bales. Production of fertilizers was also established.

What individual skills do you use, and what skills did you need to bring in?:

Walkabout Industries succeeds because its employees want to succeed, both on a personal level and as a member of a team. The strong team ethos and sense of ownership at Walkabout ensures high levels of internal and external customer service, high levels of productivity, and the production of quality products on a daily basis.

Developing and maintaining strong partnerships with customers and clients is also important to Walkabout's success. Walkabout is known to provide quality products and service at a competitive price, and this is one of the reasons strong partnerships have been formed – not because Walkabout is a social enterprise.

Where did you find these skills?:

Walkabout's employees bring a lot of skills and determination to the workplace on a daily basis. They want to be involved in what's happening and take pride in the work they do individually and as a team. There is a plan of continuous improvement at Walkabout that has seen an increase in the amount of paper being recycled going from 700 tonnes, to 1450 tonnes in five years. Production of potting mix has also increased by 30,000 bags a year from five years ago.

What is missing to support you?:

Walkabout Industries has outgrown its current facilities in Glenorchy. New premises would improve available space, increase workflows, minimise the risk of injury, and allow the sourcing of new business.

Where we are now:

Today, Walkabout Industries employs 38 Tasmanians with different abilities, along with a Divisional Manager and seven supervisory staff. Its core business is paper recycling and security shredding; manufacturing potting mix for well-known brands, and the bottling of solvents under the Walkabout brand.

Why our work matters:

Walkabout Industries develops a sense of worth amongst its employees. Individuals are empowered to live independently and become more active in the community wherever possible. Walkabout's employees feel valued because they are contributing to the community by producing quality products and services. Many of Walkabout's employees would perhaps lead unfulfilled lives if not for the employment and training opportunities offered to them by OAK Tasmania.

The **hardest thing** has been….

One of the most challenging issues for Walkabout Industries is to increase business while working within the confines of limited space and with limited resources. An ageing workforce presents its own set of challenges in relation to levels of support and productivity.

The **most important thing** we have learned….

Walkabout Industries has always treated its employees as people – not as people living with disability.

Our **dream** is to…

One of the goals of Walkabout Industries is the secure a new premises and to improve its facilities.

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EMAIL: mark.franklin@oak.org.au

WEB: OAK.ORG.AU

PHONE: 6272 8244

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Appendix One: Tasmanian Social Enterprise Survey Instrument

Tasmanian Social Enterprise Survey

ABOUT THE SURVEY

The Tasmanian Social Enterprise Study is the first-ever study of 'social enterprise' in Tasmania. It is a partnership between the Tasmanian Government and the University of Tasmania. The study's aim is to investigate the level of social enterprise activity in Tasmania, to guide the development of the sector in Tasmania and nationally.

This survey is a key part of the study. It will be open from Friday 4th February 2011 to Friday 4th March 2011 and the results will be publicly available by mid 2011.

ARE YOU A SOCIAL ENTERPRISE?

If your organisation or business's mission is to benefit the community and you sell a product or service to achieve this, then we want to hear from you. Whether or not you call yourself a 'social enterprise', we invite you to get involved. Equally, if your organisation considers itself a social enterprise – even if it does not exactly fit the description, we invite you to participate.

WHAT IS INVOLVED?

The survey has 20 questions and should take 15-20 minutes to complete. It asks for basic information about your organisation, its location, size, age, mission and client group, trading activities and the type of support needed. We are seeking one response per social enterprise and the results will be collated to provide an overall picture of social enterprise in Tasmania. Your organisation's individual responses will not be identified. At the end of the survey, you can choose whether or not you would like to have your organisation's name and contact details included in a list of Tasmanian social enterprises. We have also set up a **Tasmanian Social Enterprise Blog** to create a space for discussion and information sharing about social enterprise in Tasmania. If you have an interest in social enterprise, we invite you to join the discussion!

WHY BE INVOLVED?

Many organisations working in the social enterprise sector are making an impact on the social, economic and cultural wellbeing of Tasmanians. Information and outcomes are relatively unknown and unrecognised. This study will provide a deeper understanding of who is in the sector, how they are operating and what they need to tap into further opportunities. It is an important first-step to coordinated support for Tasmanian social enterprises.

ACKNOWLEDGEMENT

A number of the questions in this survey have been borrowed from the FASES (Finding Australia's Social Enterprise Sector) survey instrument developed by QUT and Social Traders. We have done this to enable the Tasmanian results to be compared with the national findings. For more information on the national FASES study go to http://www.socialeconomy.net.au.

FOR FURTHER INFORMATION about the Tasmanian Social Enterprise Study, please contact the Research Associate Kylie Eastley at socialenterprise@utas.edu.au or call 0439 262 344 or Dr Robyn Eversole at Robyn.Eversole@utas.edu.au The survey is available online via www.socialenterprisetasmania.blogspot.com or completed hard copy can be sent to you and submitted by postage to:

Kylie Eastley
120A Salamanca Arts Centre
77 Salamanca Place
Battery Point Tas 7004

Tasmanian Social Enterprise Survey

Welcome to the Tasmanian Social Enterprise Survey

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FOR FURTHER INFORMATION
For further information about the Tasmanian Social Enterprise Study, please contact the Research Associate Kylie Eastley (socialenterprise@utas.edu.au) or Dr Robyn Eversole (robyn.eversole@utas.edu.au).
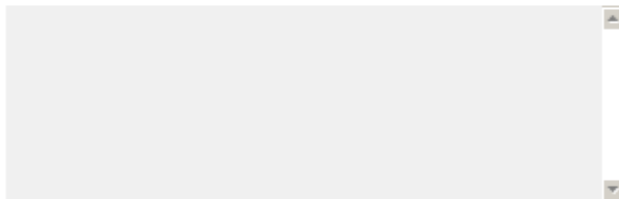
The Tasmanian Social Enterprise Survey

Tasmanian Social Enterprise Survey

1. Does your organisation (please select all that apply)

☐ Produce goods for sale

☐ Retail or wholesale goods

☐ Provide services for a fee (including, for example social, cultural, or educational services, whether paid for by the client or by a third party)

☐ Provide the use of capital assets for a fee (e.g. hire of buildings, offices, equipment)

☐ Provide a mechanism for producers to sell their goods

☐ Provide a mechanism for members to trade with each other

☐ Gain business through open tenders for government or other contracts

☐ None of the above

Please briefly describe the nature of these activities below

2. Which of the following statements best describes your organisation's main purpose (please select all that apply:

☐ We exist primarily to fulfill a public or community benefit

☐ We exist primarily to provide benefits to our members

☐ We exist primarily to support the mission of our non-profit auspice

☐ We exist primarily to generate financial benefits for individuals
Other,

☐ None of the above

3. Do you consider your organisation to be a social enterprise:

○ Yes

○ No

Why or why not?

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[                                                            ]
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4. Please specify the location or locations (by LGA) from which your organisation currently operates and the type of activity conducted in each.

	Location (by LGA)	Activity
Location One	[▼]	[▼]
Location Two	[▼]	[▼]
Location Three	[▼]	[▼]

If your organisation operates at more than three distinct locations, how many in total? Please indicate the overall geographic spread of your activities:

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[                                                            ]
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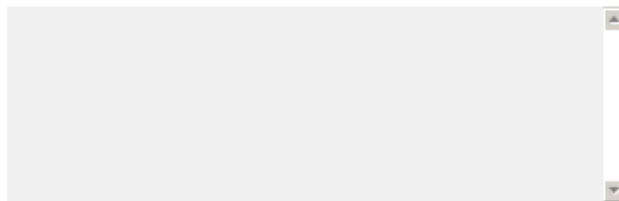
Tasmanian Social Enterprise Survey

5. In what industry/ies does your organisation operate ? Please select all that apply.

- ☐ Education and training
- ☐ Wholesale trade
- ☐ Food retailing
- ☐ Other retail trade
- ☐ Accommodation
- ☐ Food and beverage services (e.g. cafes, catering, pubs, clubs/hospitality)
- ☐ Arts and Recreation Services
- ☐ Hospitals, medical and other health care services
- ☐ Residential care services
- ☐ Social assistance services (e.g. childcare, disability support)
- ☐ Transport, postal and warehousing services
- ☐ Information, media and telecommunications
- ☐ Financial and insurance services
- ☐ Rental, hiring and real estate services
- ☐ Professional, Scientific and Technical services
- ☐ Employment services
- ☐ Building cleaning, pest control and other support services
- ☐ Other administrative and support services
- ☐ Agriculture, forestry and fishing
- ☐ Mining
- ☐ Manufacturing
- ☐ Electricity, gas, water and waste services
- ☐ Construction
- ☐ Personal and other services (e.g. civic, professional and other interest group services)

6. What are the main purposes of your organisation (please select up to three that apply)?
Other,

☐ Develop new solutions to social, cultural, economic or environmental problems

☐ Provide needed goods or services to a specific area

☐ Provide needed goods or services to a specific group

☐ Create opportunities for people to participate in their community

☐ Provide training opportunities for people from a specific area

☐ Provide training opportunities for people from a specific group

☐ Create meaningful employment opportunities for people from a specific area

☐ Create meaningful employment opportunities for people from a specific group

☐ Address an environmental issue

☐ Provide a vehicle for members to trade their goods or services with each other

☐ Provide a vehicle for members to trade their goods or services on the open market

☐ Advance cultural awareness

☐ Advocate or promote the interests of a particular group or cause

☐ Generate income to reinvest in charitable services or community activities

☐ Other (please specify):

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7. Who are your organisation's targeted beneficiaries (please select all that apply)?

- [ ] People with alcohol, drug, or substance use issues
- [ ] Aboriginal and Torres Strait Islanders
- [ ] A spiritual or religious community
- [ ] Young people
- [ ] A particular geographic community (e.g. neighbourhood, suburb or town)
- [ ] People with disabilities
- [ ] Older people/the elderly
- [ ] Families
- [ ] Homeless people
- [ ] Migrants, refugees, or asylum seekers
- [ ] Lesbian, Gay, Bisexual, Transgender people
- [ ] Disadvantaged men
- [ ] People with mental illness
- [ ] Prisoners and ex-offenders
- [ ] Remote or rural community
- [ ] Unemployed people
- [ ] Disadvantaged women
- [ ] Animals
- [ ] Environment
- [ ] Workers or producers
- [ ] A community of professional practice
- [ ] Other organisations
- [ ] Other, please specify:

8. What best describes the geographic focus of the social purpose or issues that your organisation aims to address? (select all that apply)

☐ Local

☐ Regional

☐ Statewide

☐ National

☐ International

9. If your organisation conducts trading activity, what best describes the geographic reach of your markets? (select all that apply)

☐ Local

☐ Regional

☐ Statewide

☐ National

☐ International

☐ Not applicable

10. To what extent do you disagree or agree with the following statements. Please mark the corresponding circle - only one per line.
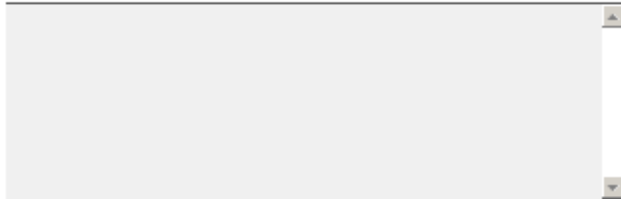
	1-highly disagree	2-disagree	3-neutral	4-agree	5-highly agree
1. Our beneficiaries are actively involved in our organisation.	○	○	○	○	○
2. Our beneficiaries are actively involved in our trading activities.	○	○	○	○	○
3. Our beneficiaries are formally involved in decision-making.	○	○	○	○	○
4. Our beneficiaries are informally involved in decision-making.	○	○	○	○	○
5. Our beneficiaries are actively involved in delivering our programs and services.	○	○	○	○	○

11. Has your organisation conducted any studies to measure or assess the impact of your activities for people or communities in Tasmania?

○ Yes

○ No

○ Not sure

If yes, please specify, and list any studies that are publically available.

12. How long has your organisation been operating in Tasmania? Please pick one of the answers below.

○ Not yet fully operational

○ Less than 2 years

○ 2-5 years

○ 6-10 years

○ More than 10 years

13. How long has your organisation been engaged in regular trading activity in Tasmania?

○ Not yet fully operational

○ Less than 2 years

○ 2-5 years

○ 6-10 years

○ More than 10 years

14. What is your organisation's legal status?
Please pick one of the answers below or add your own.

- ○ Unincorporated association (a group with no formal legal structure)
- ○ Incorporated association (Inc or Incorporated is part of your formal name)
- ○ Company limited by guarantee (Ltd or Limited is part of your formal name)
- ○ Co-operative
- ○ Royal charter or Letters patent (created under Religious, Educational, and Charitable Institutions Act)
- ○ Legislation (own Act of Parliament such as churches, Scouts, etc)
- ○ Partnership
- ○ Publicly listed company
- ○ Proprietary Limited Company
- ○ Sole proprietorship (sole trader)
- ○ Trust (have a Deed of Trust as a constitution)
- ○ Not sure
- ○ Other, please specify:

15. Please let us know your current number of workers, including owners and managers (please provide your best estimate if you do not have exact figures)

1. Full time workers (paid)	
2. Part time workers (paid)	
3. Casual workers (paid)	
4. Volunteers	
5. Total full-time equivalent (FTE) staff (paid and volunteer)	

16. In the 2009/2010 financial year, what proportion of your organisation's income was derived from the following (please include as a percentage – there is no need to reveal your organisation's actual income)

	0 %	1-10%	11-30%	31-50%	51-70%	71-90%	More than 90%
1. Income derived from sale of goods or services direct to consumers (either individuals or organisations) – as a percentage of all income.	○	○	○	○	○	○	○
2. Government payments for service delivery via competitive tendering – as a percentage of all income.	○	○	○	○	○	○	○
3. All payments received in exchange for goods or services – as a percentage of all income.	○	○	○	○	○	○	○

17. In the next three years does your organisation:

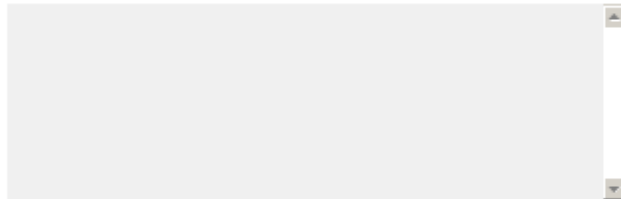☐ Aim to grow income derived through trade

☐ Aim to maintain current income levels derived through trade

☐ Aim to decrease income derived through trade

☐ Aim to expand the products or services you provide

☐ Aim to decrease or consolidate the products or services you provide

☐ Aim to expand the geographic reach of your organisation's activities

☐ Other significant planned change

Please comment below:

18. In your opinion, what are the main barriers to starting or growing a social enterprise in Tasmania?

☐ Affordability of finance

☐ Availability of finance

☐ Suitability of financial products

☐ Financial risk

☐ Availability of training

☐ Availability of mentoring

☐ Availability of professional business development advice

☐ Availability of professional financial advice

☐ Availability of professional legal advice

☐ Knowledge of the market

☐ Nature of the market

☐ Marketing skills

☐ Organisational governance issues

☐ Lack of expertise in procurement/tendering

☐ Lack of availability of grants for social enterprises

☐ Availability of skilled workers/ volunteers

☐ Other, please specify, or provide further comment

19. What is the greatest challenge your organisation has faced? Has assistance been available when you needed it?

20. What do you see as the top three needs or opportunities to remove barriers and encourage the growth of social enterprises in Tasmania?

Additional Permissions

21. Do you grant permission to have your organisation's name, email address, website (if applicable), phone number and head office address included in a directory of social enterprises in Tasmania to be included in the Tasmanian Social Enterprise Study report?

Please pick one of the answers below.

○ Yes

○ No

○ Not sure (Not sure if you are authorised to provide these permissions? Don't worry, we will call to follow this up)

22. If you grant permission to have your organisation's name and contact details included in the Tasmanian Social Enterprise Study report please complete the input boxes below:

1. Organisation's name.	
2. Email address.	
3. Website (if applicable).	
4. Phone Number.	
5. Head office address.	

Thank you for your participation in this survey!

Tasmanian Social Enterprise Survey

Thank you for your contribution to the Tasmanian Social Enterprise Study! Together we hope to create a good picture of social enterprise in Tasmania.Please also visit our blogspot (TSES blogspot)and tell us what you think! Links to further resources are available, as well as ongoing discussion about Tasmanian social enterprise. The study's final report will be available by mid 2011. Please indicate below if you would like to receive an email version of the final report. Please also indicate if you would like to be contacted by a project researcher to explore other ways that your organisation can be involved in the Tasmanian Social Enterprise Study. Thank you!

23. Do you wish to receive an email copy of the final report and or be contacted by a project researcher?

☐ Yes, I would like to receive an email version of the final report (please provide your email address below)

☐ Yes I would like to be contacted by a project researcher (please provide your email address below)

Please insert your email address below

The following maps provide a visual representation of Tasmanian social enterprise locations in the Education and Training, Arts and Recreation Services, and Social Assistance Services industries.

Education and Training
SOCIAL ENTERPRISE LOCATIONS by LGA
2011
Based on Survey Responses

n = 102 locations across Tasmania

Legend:
- 0
- 1 - 4
- 5 - 9
- 10 - 20
- More than 20

ARTS AND RECREATION INDUSTRY
SOCIAL ENTERPRISE LOCATIONS BY LGA
2011
Based on Survey Responses
n = 62 Locations across Tasmania
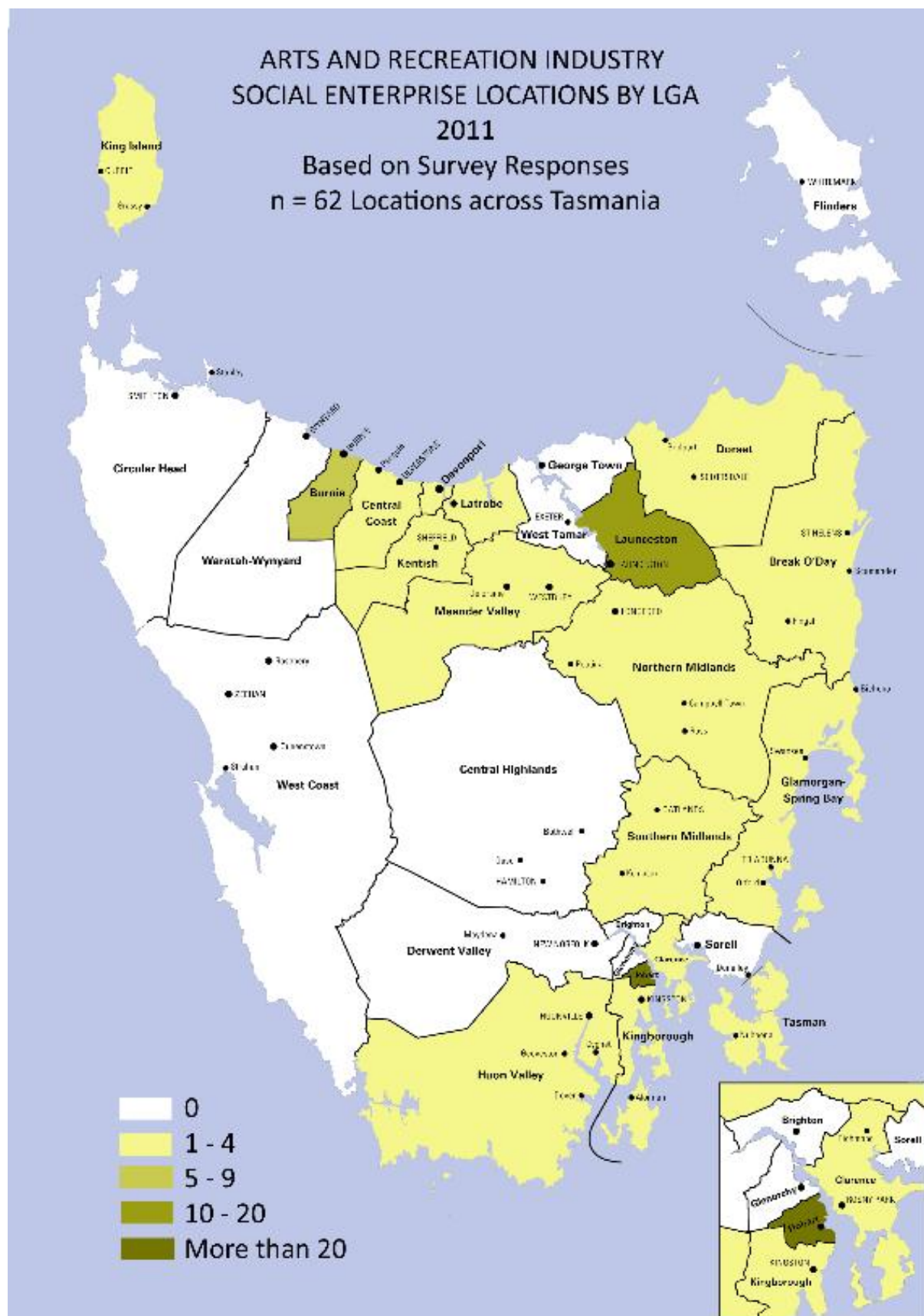
SOCIAL ASSISTANCE INDUSTRY
SOCIAL ENTERPRISE LOCATIONS BY LGA
2011
Based on Survey Responses
n = 62 Locations across Tasmania

Appendix Three: Working Database of Tasmanian Social Enterprises

The following have given their permission for their contact details to be included in a directory of Social Enterprises in Tasmania. The following list is a starting-point; other Tasmanian social enterprises are invited to add their contact details as we continue to grow this directory.
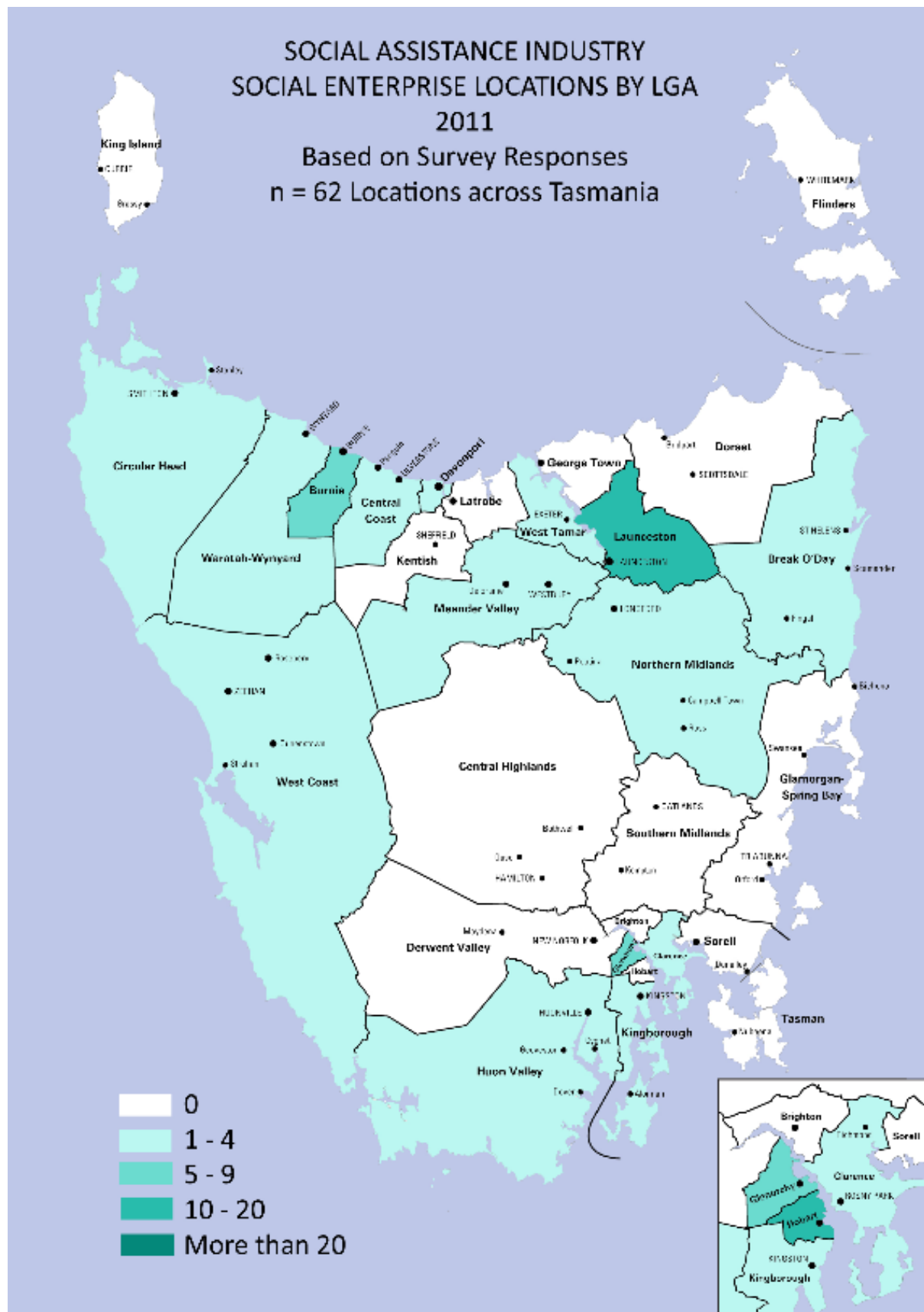
1. Organisation's name.	2. Email address.	3. Website (if applicable).	4. Phone Number.	5. Head office address.
Start Fresh Services (Colony47)	kevint@colony47.com.au		03 6214 1335	432 Elizabeth Street North Hobart
Janet Saunders	Workskills Inc.	www.workskills.org.au	03 6224 4566	
Playgroup Tasmania	debbie.smith@playgrouptas.or.au	www.playgrouptas.org.au	03 6331 0121	35 Holbrook Street Invermay Launceston 7248
Moving On Property	patf@colony47.com.au	www.movingonproperty.com.au	0419 329 717	446 Elizabeth Street Hobart
Gone Rustic	gonerustic@yahoo.com.au	www.gonerustic.com	03 6372 2724	37 Main Street, St. Marys, Tasmania 7215
Cohousing Co-operative	secretary@cohousingcoop.org	www.cohousingcoop.org	03 6223 5912	1/201 Strickland Ave
Migrant Resource Centre (Southern Tasmania) Inc	ahamilton@mrchobart.org.au	wwwmrchobart.org.au	03 6272 2614	49 Molle Street Hobart
Act Your Age-seniors theatre group	actone@iinet.net.au	www.actyourage.org.au	0401 000 067	AYA, PO Box 511, Rosny Park TAS 7018
Launceston City Council	info@launceston.tas.gov.au	www.launceston.tas.gov.au	03 6323 3000	Civic Square, Launceston
Suzanne Crowley	skc393@gmail.com	www.suzannecrowley.net.au	0421 013 169	393 Huon Road
1Source Health & Wellbeing Inc.	support@1source.org.au	www.1source.org.au	0400 606 321	23 The Avenue, Ellendale, Tas, 7140
Herbal Key Massage Clinic	barbara.ludwig@bigpond.com		0400 635 555	Shop 5, 27 Cole Street, Sorell 7172
Karen Frost	karen@ilctas.asn.au	www.ilctas.asn.au	03 6334 5899	46 Canning St, Launceston Tas 7250
Studio Be	mvmas.studiobe@gmail.com	www.myspace.com/studiobetas	0400283557 (Ian Howard coordinator)	
Yoga For You	yogaforyou1@bigpond.com	NA	03 6491 1467	PO BOX 239 Sheffield 7306 TAS
JobNet Tasmania	jobnet@colony47.com.au	www.jobnet.org.au www.colony47.com.au	03 6214 1372	432 Elizabeth Street North Hobart

Designed Objects Tasmania	info@dot.org.au	www.dot.org.au	03 6231 2474	27A Tasman St. North Hobart. 7000
Coastal Family Day Care Scheme	lmoran@coastalfdc.org	www.coastalfdc.org	03 6435 3322	34 Wragg Street, Somerset
Wild Threads	tigerhill1@bigpond.com		0458 818 178	13101 Highland Lake Rd Golden Valley. Tas 7304
Cygnet Arts Council	chaiwomble@bigpond.com		0428 603 299	N/A
Parakaleo Ministries Inc, trading as Choose Life Services (CLS)	annette@parakaleo.org.au	www.chooselifeservices.org.au	0417 320 861	PO Box 1104, Devonport 7310
Tadpac Print	tadpac@tadpac.com.au	www.tadpac.com.au	03 6272 5000	98 Grove Road Glenorchy
Centre for Creative and Cultural Development	neilcameron@netspace.net.au	www.neilcameron.com	6223 6054	4 Milles St, South Hobart, 7004
Brave Foundation	bernie@bravefoundation.org.au	www.braveofundation.org.au	0404 060 507	20 Illawarra Rd Blackmans Bay 7052
Stompin	emmap@stompin.net	www.stompin.net	6334 3802	Dicky Whites Lane, Quadrant Mall, Launceston
Interweave Arts Association	kim@streetsalive.com.au	www.streetsalive.com.au	03 6323 3789	Studio-QVMAG Inveresk Railyards, 7248
Invisible Boy	ben@invisibleboy.com.au	www.invisibleboy.com.au	03 6326 7749	4 Burrawang Crt Rocherlea
National Disability Services	margaret.reynolds@nds.org.au	www.nds.com.au	03 6223 6086	221 Macquarie St, Hobart
Central Coast Council	david.coy@centralcoast.tas.gov.au	http://www.centralcoast.tas.gov.au/	03 6429 8955	03 6428 8900
Dynamic Art	louisevander@hotmail.com	www.dynamicarttasmania.com	0447 187 347	2/17 Wilmot rd Huonville Tasmania 7109
Break O'Day Health resource Association Inc.	matthew.osborne@healthyhouse.org.au	www.healthyhouse.org.au	03 6376 5242	5 Portland Crt. St Helens TASMANIA
Mission Australia	mundyn@missionaustralia.com.au	www.missionaustralia.com.au	03 6234 3240	Suite 2, Level 1, 175 Collins Street Hobart TAS 7000
The Multiple Sclerosis Society of Tasmania	heather.francis@mstas.org.au	www.mstas.org.au	03 6220 1111	Locked Bag 4, Sandy Bay 7006
East Coast Regional Development Organisation Inc _The Village	windsong@skymesh.com.au		03 6257 7583	
Out on a Limb	suebenner@bigpond.com		0412 310 660	777 Nubeena Back Rd, Koonya 7107
The Wilderness Society (Tasmania) Inc	tasmania@wilderness.org.au		03 62811940	130 Davey Street, Hobart
Oak Tasmania	john.paton@oak.org.au	www.oak.org.au	0439 618 189	56 Clydesdale Ave, Glenorchy

Colony47		www.colony47.com.au		47 Davey Street, Hobart 7000
New Audiences for Art	jane@newaudiencesforart.com	www.newaudiencesforart.com	0417 187 164	
Bonorong wildlife sanctuary	Info@Bonorong.com.au	Www.Bonorong.com.au	03 6268 1184	593 Briggs road Brighton
The Craft Hive	queen@thecrafthive.com	www.thecrafthive.com	0403 685 724	147 Liverpool Street, Hobart
Tasmanian Regional Arts Inc.	kylie@tasregionalarts.org.au	www.trabranchingout.blogspot.com or www.tasregionalarts.org.au	0439 262 344	Cnr George & James St, Latrobe
Tasmanian Polytechnic- Work Education Area	Yo-Anne.Eastley@polytechnic.tas.edu.au	www.Tasmanianpolytechnic.com.au	03 6336 2758	Hobart
Burnie City Council		www.burnie.net	03 6430 5700	PO Box 973, Burnie 7320
Benchmarking Birchs Bay	info@fleurtys.com.au	www.fleurtys.com.au	03 6267 5078	PO Box 194 Woodbridge, 7162
Hearing Link Tasmania	info@hearinglink.com.au	www.hearinglink.com.au	03 6231 6501	334 Elizabeth Street, North Hobart Tas 7000
Derwent Catchment NRM Committee, Inc			03 6286 3211	Hamilton Resource Centre, Hamilton, TAS 7140
Tasmanian Deaf Society (Tasdeaf)	gordon.m@tasdeaf.org.au	www.tasdeaf.org.au	03 6231 6501	334 Elizabeth St, North Hobart 7001
Near and Far	info@nearandfar.com.au	www.nearandfar.com.au	03 62951085	30 Mary Street Cygnet
Tasmanian Writers' Centre	director@tasmanianwriters.org	www.tasmanianwriters.org	03 6224 0029	Salamanca Arts Centre 77 Salamanca Place Hobart 7000
Blue Sky Business Services	joe@blueskybusinessservices.com	www.blueskybusinessservices.com	0432 126 421	PO Box 261 Sandy Bay Tas. 7006
Scented Grove Nursery	scentedgrove@dodo.com.au		03 62664396	259 Crabtree Rd, Crabtree 7109
Kylie Eastley	keastley@optusnet.com.au	www.kylieeastley.blogspot.com	0488 530 514	22 Mountain Place, Molesworth Tasmania 7140
CHOOSE Employment	sandra.connelly@chooseemployment.org.au	www.chooseemployment.org.au	03 6337 9999	45 Best Street, Devonport
Peppermint Eco Recovery Pty Ltd			0400 173 763	100 Ring Road, New Norfolk Tas 7140
Source Community Wholefoods	source.wholefoods@gmail.com	www.sourcewholefoods.org.au	0427 177 435	12 French St Sandy Bay
Tarkine Trails	simon@tarkinetrails.com.au	www.tarkinetrails.com.au	03 6223 5320	148 Davey St, Hobart
The Flower Room	maglen@optusnet.com.au		03 6236 9460	108-110 Bathurst St Hobart 7000
Penguin Club of Australia Inc	sandra.noshame@gmail.com	www.thepenguinclub.asn.au/tas	03 6261 4307	n/a
Source Community Wholefoods Cooperative	source.wholefoods@gmail.com	www.sourcewholefoods.org.au	03 6224 0055	12 French St Sandy Bay, Hobart, 7004

O group Inc	info@ogroup.org.au	www.ogroup.org.au	03 6422 7700	45 Best Street Devonport Tas 7310
Australia Business Arts Foundation	tas@abaf.org.au	www.abaf.org.au	03 6233 5934	Level 2 405 Collins St Melbourne VIC 3000