



***Evolution  
of the social  
enterprise industry:  
A chronology  
of key events***

*Revised August 1, 2008*

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***The social enterprise industry  
is rapidly evolving***

***This chronology is an attempt  
to collect in one place  
some of the key events  
that have helped shape  
the industry thus far,  
before they are lost to time***

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***Dozens of people have already  
contributed information for the chronology***

***Please join them!***

***The chronology will be updated every summer:  
Please e-mail any corrections, amplifications  
or additions to [institute@orbis.net](mailto:institute@orbis.net)***

***Thank you!***

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## DEFINITION OF SOCIAL ENTERPRISE

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For the purposes of this chronology,  
a “social enterprise” is any entity  
that uses earned revenue  
to pursue a double or triple bottom line

- Either alone (*in a private sector or nonprofit business*)
- Or as a significant part of a nonprofit’s mixed revenue stream that also includes philanthropy and government subsidies

Social enterprises *directly* confront social needs through their products and services rather than *indirectly* through socially responsible business practices such as corporate philanthropy, equitable wages and environmentally friendly operations – or through the unrelated business activities mounted by nonprofits

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## CAVEATS

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This is not meant to be a chronology  
of social enterprises themselves

Rather, it is an attempt to identify key events  
in the surrounding eco-system  
that have led to the emergence of an industry  
replete with investors, academics, consultants,  
media watchdogs and others

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## HISTORICAL ANTECEDENTS *(courtesy Jim McClurg)*

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- **Monasteries:** Trade in the commodities of wine and cheese
- **Performing arts (theatre, ballet, symphony, opera):** Admission fees
- **Painters/sculptors:** Patrons and sponsorships
- **Missionaries:** Working in the marketplace to support themselves (“tentmaking”)
- **Prisons:** Community work projects
- **Higher education:** Tuition
- **Hospitals:** Fees to underwrite aid to the poor

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## PRIVATE SECTOR SOCIAL ENTERPRISE: FORERUNNERS

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### 1890s: THE CARNEGIE MODEL

“Arm’s length philanthropy”  
*(make your fortune first, then give it away)*

“Scientific” philanthropy: Help those willing to help themselves (“the swimming tenth”  
-- industrious workers who keep their heads above water)

Preferred fields of giving: Universities, free libraries, hospitals, parks, concert halls, swimming pools, church buildings

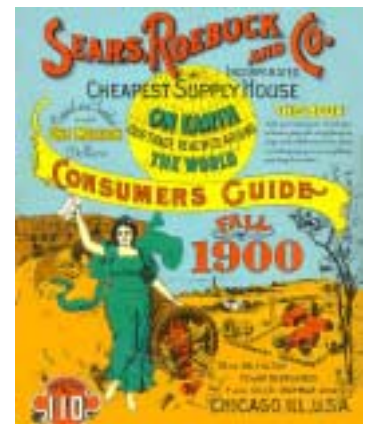
***Andrew Carnegie viewed his expenses as “good works”***



### 1910s-1920s: THE ROSENWALD MODEL *(Sears Roebuck and Co.)*

“Long-term market development”

Inventing and investing in organizations that benefit agricultural communities (e.g., the rural extension agent, the 4H Club) to make sure there would be a market for the company 20 years down the line



***Julius Rosenwald viewed his expenses as “sunk costs”***



**1960s – 1980s:  
THE NORRIS MODEL  
(Control Data Corporation)**



“Direct engagement”

*“Addressing the major unmet needs of society  
as profitable business opportunities”*

***William C. Norris viewed his expenses as “investments”***

**SOME OF CONTROL DATA’S SOCIAL ENTERPRISES**

- Developing an array of computer-based learning programs for colleges, universities and self-paced learners
- Revitalizing entire urban neighborhoods and rural communities (City Venture and Rural Venture)
- Working with Chief Justice Warren Burger to create businesses and training opportunities in prisons
- Launching the first small business incubator in the country
- Developing some of the nation’s first corporate wind farms
- Operating mobile medical vans on a Native American reservation
- Using computer technology to herd Caribou beyond the Arctic Circle

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**PRIVATE SECTOR SOCIAL ENTERPRISES  
STARTED DURING THE 1970s (SELECTED LIST)**

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- Adult day care centers
- Early childhood learning centers
- Low-income housing
- Vocational training and placement centers
- Home modification services
- Hospice care
- Outpatient mental health and rehab services
- Computer-based education programs for self-paced learners
- Alternative schools for potential high school dropouts
- Tutoring centers
- Private sector prisons
- Private sector universities
- Wind farms
- Psychiatric and substance abuse rehab centers
- Home care for the elderly

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## NONPROFIT SECTOR SOCIAL ENTERPRISE: FORERUNNERS

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- **1844: Rochdale, England**

Suffering at the hands of exploitative factory owners and shopkeepers who charged extortionate prices, 28 working men scraped together a total of £28 to open their own shop

It was the beginning of the modern co-op movement



- **1884: Chicago**

*Jane Addams Hull House*

***Jane Addams and Helen Gates Starr***



ADDAMS

Night school for adults, kindergarten classes, clubs for older children, **public kitchen (selling soups and stews)**, art gallery, coffeehouse, gymnasium, **coal cooperative**, girls club, swimming pool, **book bindery**, music school, drama group, library

- **1895: Boston**

*Goodwill Industries*

***Rev. Edgar J. Helms***




***First thrift store:*** Collecting unwanted household goods and employing impoverished immigrants to repair and refurbish the items for resale -- revenue from the sales paid the workers' wages

- **1938: Washington, D.C.**

*Wagner-O'Day Act*

Passed during President Franklin D. Roosevelt's second term, the Wagner-O'Day Act became the first in a series of legislative actions to provide employment opportunities for people with severe disabilities. Today the program works with more than 600 social enterprises across the country and provides employment opportunities for nearly 48,000 Americans.



The original Wagner-O'Day Act mandated that the federal government purchase brooms, mops and other suitable commodities furnished by community programs employing people who are blind. The legislation used the purchasing power of the government as a catalyst for sustaining and expanding employment opportunities. The law also required that at least 75% of a participating organization's direct labor employees be people who are blind. In addition, the Act established a committee appointed by the President -- the Committee for Purchase From People Who Are Blind or Severely Disabled (formerly known as the Committee on Purchases of Blind-made Products) -- to oversee the program and create a central nonprofit agency to facilitate the distribution of orders and perform other related functions. A group of representatives from 20 agencies in 11 states began meeting at the  American Foundation for the Blind soon after the law was passed. As a result, the Committee created National Industries for the Blind (NIB) and authorized it as the program's first central nonprofit agency.

In 1971, Sen. Jacob Javits and a coalition of agencies serving people with a range of severe disabilities spearheaded efforts to expand the Wagner-O'Day Act. The agencies included **Goodwill Industries International**, the **National Easter Seal Society**, the **American Rehabilitation Association**, **The ARC**, the **United Cerebral Palsy Association**, and the **International Association of Jewish Vocational Services**. These six groups soon formed a new organization -- NISH (formerly known as National Industries for the Severely Handicapped) -- whose purpose was to support the expanded Javits-Wagner-O'Day (JWOD) program, which permitted participation by nonprofits serving people with severe disabilities other than blindness and authorized them to provide not only supplies but also services to the federal government.



In 2006, the overall program became known as AbilityOne.



- **1956: Mondragón, Spain**

*Mondragón Corporación Cooperativa - MCC*



**The world's largest social enterprise  
by annual sales and size of staff**

The town of Mondragón had suffered badly during the Spanish Civil War, leading to mass unemployment. A 26-year-old priest, Father José María Arizmendiarieta, arrived in 1941 and decided to focus on economic development, settling upon co-operative methods to achieve his goals. Co-operatives and self-help organizations had a long tradition in Basque Country but had died away after the War. In 1943, Arizmendi set up a democratically-managed Polytechnic School, which played a key role in the emergence and development of the co-operative movement. In 1956, five young graduates of the school established the first co-operative enterprise, named ULGOR (now Fagor Electrodomésticos) after their surnames, which during its early years focused on the manufacture of petrol-based heaters and cookers. In 1959, they set up the Caja Laboral Popular ("People's Worker Bank"), a credit union that allowed co-operative members access to financial services and subsequently provided start-up funds for new co-operative ventures. Today, MCC consists of 120 companies; employs 42,000 worker-owners; runs 43 schools and one college; generates more than \$4.8 billion annually in manufacturing, services, retail and wholesale distribution; administers more than \$5 billion in financial assets; and has a business plan animated by the principles of the social doctrine of the Roman Catholic Church.

- **1973: Chicago**

*Social activism in the banking industry*



**Milton Davis, James Fletcher, Ronald Grzywinski, Mary Houghton**

ShoreBank came into existence when its founders purchased the South Shore National Bank (now ShoreBank) on Chicago's South Side. The South Shore neighborhood had been undergoing racial change at the time, and the bank's former owners wanted to move the failing institution north to the city's downtown business district. Neighborhood residents protested and, for the first time in U.S. banking history, federal regulators denied an application to relocate a bank for reasons of changing neighborhood demographics.



At the same time, four friends and co-workers -- Milton Davis, James Fletcher, Ronald Grzywinski and Mary Houghton -- whose combined backgrounds encompassed banking, social services and community activism, were seeking to buy a bank. They believed a commercial bank, flanked by complementary development organizations, could effectively restore neighborhood economies.



With \$800,000 in capital and a \$2.4 million loan from the American National Bank, they bought South Shore National Bank. From its inception, ShoreBank's operations demonstrated that a specially designed, regulated bank can help reverse the decline of inner-city neighborhoods coping with disinvestment and discrimination. Within two years, profitable operations were restored and, in 1978, ShoreBank Corporation (the regulated bank holding company owning ShoreBank) created three affiliates to complement the bank: A real estate development company, a nonprofit, and a minority venture capital fund.

ShoreBank began replicating its development banking approach in 1986 and currently has companies in Chicago, Cleveland, Detroit, the Upper Peninsula of Michigan and the Pacific Northwest. Its consulting company, ShoreBank International, assists and partners with development organizations domestically and internationally. ShoreBank became the first banking corporation in the U.S. to address environmental issues in 1994 when it partnered with Ecotrust, an environmental organization, to create ShoreBank Enterprise Cascadia (a nonprofit) and ShoreBank Pacific. In 1995, ShoreBank doubled in size to just over \$500 million when it merged with Indecorp, a minority-owned Chicago bank holding company that included two South Side commercial banks.

- **Late 20<sup>th</sup> century**

External influences and events help catalyze global social awareness and propel the social enterprise movement, especially the rise of the personal computer, the omnipresence of the Internet and the emergence of CNN and other 24/7 news media. In the business world, a wave of tech entrepreneurs give “entrepreneurship” new cachet and eventually foster innovative types of Foundations and investment models.

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## NONPROFIT SECTOR SOCIAL ENTERPRISE PRIOR TO THE 1980s

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***A few individual social entrepreneurs,  
generally unknown to each other***

***Top row:*** Edna Ruth Byler (Ten Thousand Villages), John DuRand (Minnesota Diversified Industries), Mimi Silbert (Delancey Street Foundation).

***Second row:*** Hugh Westbrook and Esther Colliflower (Vitas Innovative Hospice Care), Bill Strickland (Manchester Bidwell Corporation), Jim McClurg (Northwest Center), Bill Kling (Minnesota Public Radio).

***Third row:*** Richard Steckel (Denver Children's Museum), Earl Copus, Jr. (Melwood), Fazle Hasan Abed (BRAC), Ashoka Khosla (Development Alternatives Group), Margaret Cossette (Missouri Home Care).

***Bottom row:*** Rev. William Lindner (left).



***Almost everything "under the radar"  
. . . no books, no courses, no seminars***

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## ***Evolution of the social enterprise industry: 1980***

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### **ASHOKA: INNOVATORS FOR THE PUBLIC**

**Founder: Bill Drayton**



Ashoka currently has programs in more than 60 countries and supports the work of more than 1,800 Fellows who have systemic changing ideas that are potentially sustainable and replicable, both nationally and globally. A total of 160 staff members serve in 25 regional offices throughout Africa, the Americas, Asia, Europe, the Middle East and North Africa. Financed by individuals, foundations and business Entrepreneurs from around the world, Ashoka does not accept funding from government entities. A \$50,000 annual budget in 1981 has grown today to more than \$30 million.

**Important note:** *The definition of “social entrepreneurship” pioneered by Ashoka and later adopted by Prof. J. Gregory Dees, the Skoll Foundation and others does not necessarily entail earned income – but does not exclude social enterprises.*

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### **NEW VENTURES, INC.**

***Edward Skloot and Cynthia Massarsky***

First nonprofit consulting firm in the field (1980-1989), eventually employing eight people



SKLOOT AND MASSARSKY (RIGHT)  
WITH ONE OF THEIR CLIENTS  
(SANDY GRYMES OF PLANNED PARENTHOOD)  
IN A 1984 *INC.* MAGAZINE FEATURE ARTICLE



### **FIRST INTERNATIONAL CONFERENCE ABOUT SOCIAL ENTERPRISE: “MAKING MONEY”**

**Convener: Richard Steckel**

After he and Director of Enterprise Lisa Farber Miller convert the Denver Children’s Museum into a thriving social enterprise, Steckel invites a group of colleagues from around the world to gather for peer support and to share lessons learned. More than 250 delegates participate.

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## ***Evolution of the social enterprise industry: 1982***

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### **PRIVATE SECTOR SOCIAL ENTERPRISE INTERNATIONAL CONFERENCE: “SOCIAL NEEDS AND BUSINESS OPPORTUNITIES”**

*Co-sponsored by Control Data Corporation  
and the American Academy of Arts and Sciences  
in celebration of Control Data’s 25<sup>th</sup> anniversary*

**Conference coordinator: Jerr Boschee**

A three-day conference attended by more than 250 CEOs from around the world



**PETER  
DRUCKER**



**JOHN  
KENNETH  
GALBRAITH**



**SIR  
CHARLES  
VILLIERS**



**WILLIAM  
C. NORRIS**

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### **FIRST NATIONAL SURVEY OF NONPROFIT SOCIAL ENTERPRISES**

#### ***Enterprise in the Nonprofit Sector***

***By James C. Crimmins and Mary Keil***

The authors distributed questionnaires to 1,800 small- to medium-sized nonprofits outside major metropolitan areas, conducted follow-up telephone calls and eventually received 130 completed questionnaires. The bulk of their book contains profiles of social enterprises operated by 11 nonprofits: Denver Children’s Museum, Housing Opportunities, Skidmore College, Southwest Craft Center, the Des Moines Ballet Company, Wells College, Pikes Peak mental health Center, the Shoreline Association for Retarded and Handicapped, the Guthrie Theatre, St. John’s College and Disc Village.

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## ***Evolution of the social enterprise industry: 1982 (continued)***

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### **FIRST BUSINESS PLANNING GUIDE FOR NONPROFIT SOCIAL ENTERPRISES**

#### ***Successful Business Ventures for Non-Profit Organizations***

***Publisher: The Northern Rockies Action Group***

***By Charles Cagnon***



The first business planning guide  
for nonprofits contemplating business ventures

Also contains profiles of business activities started by 12 nonprofits:  
New Resources Group, HIRED, Illinois Public Action Council,  
New York Public Interest Research Group, Massachusetts Fair Share,  
Denver Children's Museum, Food Advisory Service, Women's Resources,  
Center for Science in the Public Interest, Oregon Fair Share,  
Humphrey's County Union for Progress and Greenpeace



### **NEWMAN'S OWN**

***Founders: Paul Newman and A.E. Hotchner***

The first private sector company to donate all profits and royalties after taxes  
for educational and charitable purposes. By 2008, Newman's Own had donated  
more than \$220 million to thousands of charities worldwide.



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## ***Evolution of the social enterprise industry: 1983***

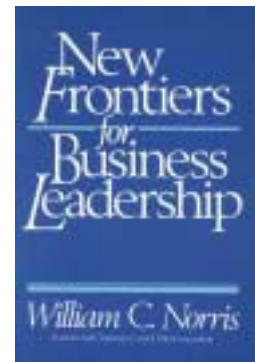
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### ***New Frontiers for Business Leadership***

***Publisher: Dorn Books***

***By William C. Norris***

A collection of essays by the founder of the private sector social enterprise movement



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### ***“Should Not-for-Profits Go into Business?”***

***Harvard Business Review***

***By Edward Skloot***

The first article submitted over the transom ever accepted by the *Harvard Business Review* -- and the first article about nonprofits ever published by the magazine



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## **BIRTH OF CAUSE-RELATED MARKETING**

***Jerry Welsh, Executive Vice President, Worldwide Marketing and Communications, American Express***



Welsh is recognized as the father of cause-related marketing, a concept he developed and service-marked during his years at American Express. The first project was the company's 1983 campaign to restore the Statue of Liberty: American Express donated one cent to the effort each time customers used American Express cards or traveler's checks. The program raised \$1.7 million, the number of new cardholders rose by 45 percent and use of the cards and checks grew by 28 percent.

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## ***Evolution of the social enterprise industry: 1984***

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### **THE NATIONAL CENTER FOR SOCIAL ENTREPRENEURS**

*(original name: Alpha Center for Public/Private Initiatives)*

**Founders: Control Data Corporation**

*(Bob Price, Sandy Bemis, James C. Worthy, Jerr Boschee)*

**Illinois Bell** *(Jack Koten)*

**Hospital Corporation of America** *(Gov. Winfield Dunn)*

**Goldman Sachs** *(John C. Whitehead)*

**Chemical Bank** *(Waite Rawls)*

**Reader's Digest** *(George Gruen)*

**Venture Technologies** *(Bobby Ginn)*

**Founding Chair:**

**Judson (Sandy) Bemis**

**President and CEO:**

**Douglas Ades**

**Vice-President and COO:**

**Jerr Boschee** *(became President and CEO in 1990)*

The second nonprofit consulting firm in the field resulted from a roundtable discussion among executives from 19 corporations (\*) at the Wye Plantation in Maryland. Control Data Corporation and The Aspen Institute co-sponsored the session and it was co-moderated by John Gardner, Founding Chair of Common Cause, and Zygmunt Nagorski, Vice President of Aspen Institute Executive Seminars.



GARDNER



NAGORSKI

- \* Participating corporations: Arthur Andersen & Company, Atlantic Richfield Company, Bemis Company, Calvert Group, Control Data Corporation, Homequity, Hospital Corporation of America, Illinois Bell, Levi Strauss USA, Motorola, PaineWebber Capital Markets, The Pillsbury Company, Preston Trucking Co., Rothschild Ventures, S. C. Johnson & Son, Seagate Community Development, TIAA-CREF, Toledo Trust Company and Volvo North American Corporation



PRICE



DUNN



KOTEN



RAWLS



WHITEHEAD



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## ***Evolution of the social enterprise industry: 1984 (continued)***

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### ***Nonprofit Piggy Goes to Market***

***By Robin Simons,  
Lisa Farber Miller  
and Peter Lengsfelder***

Describing the experiences of Richard Steckel  
and the Denver Children's Museum



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### ***Public-Private Partnership: New Opportunities for Meeting Social Needs***

***Publisher: American Academy of Arts and Sciences***

***Edited by Harvey Brooks,  
Lance Liebman and Corinne Schelling***



PATTERSON



REICH

The first academic anthology devoted to social enterprise; contributors included Harvey Brooks, Thomas K. McCraw, Charles M. Haar, Ted Kolderie, Jordan J. Baruch, Orlando Patterson, Marc Bendick, Jr., William J. Baumol, Robert C. Clark, James C. Worthy, William C. Norris, Robert B. Reich, Peter F. Drucker, James I. Sundquist, and Franklin A. Long.

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## ***Evolution of the social enterprise industry: 1985***

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### **NORTH AMERICAN SCAN OF SOCIAL ENTERPRISES**

***Alpha Center for Public/Private Initiatives***

***Researchers: Bill Blazar and Diana Witt  
Project coordinator: Jerr Boschee***

Survey of private sector and nonprofit social enterprises in 27 states,  
the District of Columbia and Canada. Resulted in profiles of 42 social enterprises.

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## ***Evolution of the social enterprise industry: 1985 (continued)***

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### **THE PUBLIC/PRIVATE INITIATIVE PROJECT**

***The Hubert H. Humphrey Institute of Public Affairs,  
University of Minnesota***

***Coordinator: Arthur Himmelman***

A multi-year examination designed to encourage and improve collaboration among the public, private and nonprofit sectors

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## ***Evolution of the social enterprise industry: 1986***

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### ***The Complete Guide to Money-Making Ventures for Nonprofit Organizations***

***Publisher: The Taft Group***

***By Peter C. Brown***

The first business planning workbook for social enterprises



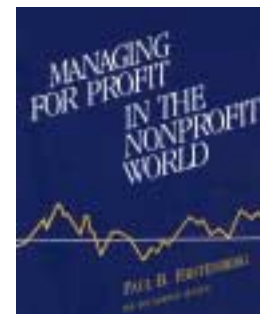
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### ***Managing for Profit in the Nonprofit World***

***Publisher: The Foundation Center***

***By Paul Firstenberg***

The first extensive review of social enterprise strategies published by a Foundation



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## ***Evolution of the social enterprise industry: 1987***

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### **THE BEACON FUND**

#### ***Alpha Center for Public/Private Initiatives***

*(Bob Faris, Charlie Lea, Doug Ades, Jerr Boschee)*

First attempt to create a social enterprise venture capital fund

Alpha Center recruited the lead partners (Faris and Lea) from two of the most successful venture capital firms in the country, then secured \$12.5 million in commitments from major institutional investors (\*) toward a \$20 million goal, but collapsed during the stock market crash during the fall of 1987.



- \* Committed investors: Chemical Bank, Control Data, Reader's Digest, Goldman Sachs, IBM, the Rockefeller family, and Rupert Murdoch/News America Corporation

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### ***Something Ventured, Something Gained: A Business Development Guide for Non-Profit Organizations***

***Publisher: Center for Non-Profit Corporations***

***By Laura Landy***

***Made possible through a grant from Hoffmann-La Roche***



Comprehensive business planning guide for social enterprises; based on the curriculum developed by Landy for the training sessions she conducted for the Grantsmanship Center during the early 1980s (the first social enterprise curriculum ever developed)

*Second edition published in 1989*

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## ***Evolution of the social enterprise industry: 1987 (continued)***

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### **THE HUMAN SERVICE ENTREPRENEUR**

***Publisher: Alpha Center for Public/Private Initiatives***

***Editor: Jerr Boschee***

First periodical published in the social enterprise arena

The Center also publishes a companion volume containing case histories of 11 social enterprises: Cooperative Home Care Associates, Minnesota Diversified Industries, Southern Kitchens, Zephyr/Heatron, Custom Manufacturing Co., Winifred Law Opportunity Center, Northwind Glass, Hospice Care, Missouri Home Care, Ombudsman Educational Services, CLIMB



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### **CHICAGO PLANNING CONFERENCE**

***Organizers: Alpha Center for Public/Private Initiatives  
(Doug Ades, Jerr Boschee)***

Representatives from nine profitable social enterprises gather to brainstorm ways to help others in the field. Participants include James Boyle and Lori Sweeney, Ombudsman Educational Services.; Fred Braun, Jr., Zephyr/Heatron; Bob Burton, VisionQuest National; Margaret Cossette, Missouri Home Care; John DuRand, Minnesota Diversified Industries; David Helmstetter, Human Resource Associates; Anne Brown Kniep, Educational Clinics; Cy Laurent, Southern Kitchens; and John McLagan, Human Service Associates.

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### **FIRST SOCIAL ENTERPRISE “CEO CLUB”**

***Facilitator: Norm Stoehr***

***Sponsor: Alpha Center for Public/Private Initiatives***

The CEOs of 10 Minnesota social enterprises from both the private and nonprofit sectors meet on a regular basis to provide peer support and share knowledge

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## ***Evolution of the social enterprise industry: 1987 (continued)***

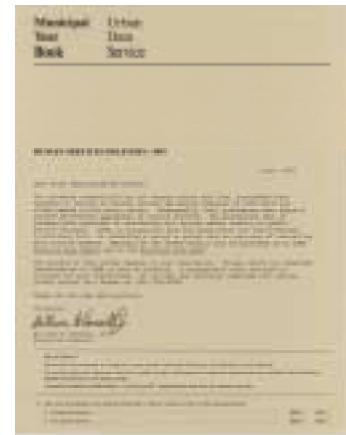
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### **NATIONAL PUBLIC SECTOR OPINION RESEARCH SURVEY**

***Conducted jointly by the International  
City Managers Association (ICMA)  
and Alpha Center for Public/Private Initiatives***

Designed to assess attitudes within the public sector about contracting delivery of human services to private sector and nonprofit social enterprises

Founded in 1914, ICMA is the professional and educational organization for city managers and their counterparts in towns, counties and regional entities



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### **APPROPRIATE TECHNOLOGY NATIONAL TASK FORCE**

***Convener: Roosevelt Warm Springs Institute (Carolyn McKinley)***

***Task force chair: Jerr Boschee, Alpha Center for Public/Private Initiatives***

A national task force of representatives from the public, private and nonprofit sectors (\*) studying the possibilities of commercializing assistive devices and other appropriate technology resources from Europe and North America to benefit the elderly and disabled. The work of the task force led to creation of Aptek, a new subsidiary of the National Center for Appropriate Technology.

- \* Participating organizations: Aetna Life & Casualty, the Carter Presidential Center, Edison Electric Institute, Ford Motor Company, Georgia Council on Developmental Disabilities, Georgia Division of Rehabilitation Services, Georgia Institute of Technology, Georgia Office of Aging, Georgia Southern College, Meredith Corporation, National Center for Appropriate Technology, National Support Center for Persons with Disabilities, Niagara Mohawk Power Corporation, President's Committee on Employment of the Handicapped, Prudential-Bache Securities, and Yankelovich, Skelly & White

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## ***Evolution of the social enterprise industry: 1988***

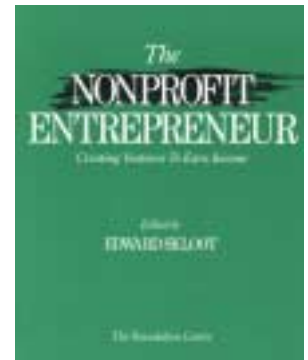
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### ***The Nonprofit Entrepreneur: Creating Ventures to Earn Income***

***Publisher: The Foundation Center***

***Editor: Edward Skloot***

First anthology for nonprofit entrepreneurs: Contains nine chapters, each focusing on a specific aspect of venturing and earned income



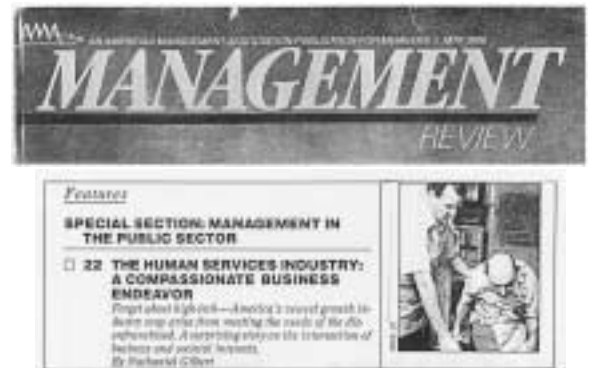
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### ***“The Human Services Industry: A Compassionate Business Endeavor”***

***Management Review***

***By Nathaniel Gilbert***

Feature story in the American Management Association magazine about the emerging human services industry featured Ombudsman Educational Services, American Learning Corporation, CompCare, InSpeech, PriCor, Missouri Home Care, Human Services Associates, CareerWorks, Minnesota Diversified Industries, and Alpha Center for Public/Private Initiatives



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## ***Evolution of the social enterprise industry: 1989***

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**SURDNA FOUNDATION  
INVESTMENTS**



Ed Skloot shuts New Ventures, Inc. (*please see 1980 events, above*) and becomes Executive Director of the Surdna Foundation. During the next few years, he uses part of his portfolio to fund nonprofits exploring social enterprise, including Greyston Bakery, the Roberts Enterprise Development Fund, Housing Works, the Bidwell Training Center, Coastal Enterprises and The Nature Conservancy.



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## ***Evolution of the social enterprise industry: 1989 (continued)***

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### **THE AFFIRMATIVE BUSINESS ALLIANCE OF NORTH AMERICA (ABANA)**

***Co-founders: John DuRand, Jerr Boschee***

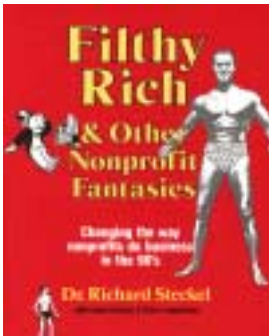
First membership organization for social entrepreneurs;  
DuRand serves as Board Chair and Boschee  
serves as President/CEO for the first two years



**DURAND**

The Alliance is today part of Workability International,  
whose 128 members in 36 countries collectively  
employ more than 3 million people with disabilities

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### ***Filthy Rich & Other Nonprofit Fantasies: Changing the way nonprofits do business in the 90's***

***Publisher: Ten Speed Press***

***By Richard Steckel, with Robin Simons & Peter Lengsfelder***

2<sup>nd</sup> edition published in 2000 as *Filthy Rich:  
How to Turn Your Nonprofit Fantasies into Cold, Hard Cash*

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### **FIRST NATIONAL TRAINING SESSIONS CONDUCTED BY A NONPROFIT ASSOCIATION**

***Sponsor: Mental Health Corporations of America, Inc. (MHCA)***  
*(Don Hevey, President; Joy Halks, Vice President)*

***Trainers: Jerr Boschee and Tom Boyd***  
*(Alpha Center for Public/Private Initiatives)*

Teams from 28 community mental health centers  
participate in a series of two-day training sessions



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## ***Evolution of the social enterprise industry: 1990***

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### **HOMELESS ECONOMIC DEVELOPMENT FUND**

***George Roberts (Roberts Foundation):  
\$6 million donation***



ROBERTS (left)

***Executive Director: Jed Emerson***



EMERSON

Eventually developed a portfolio of eight nonprofits that planned, launched and managed 23 business ventures employing formerly homeless men and women in the San Francisco Bay Area (also included a micro-enterprise program); later morphed into The Roberts Enterprise Development Fund in 1996; additional information about both Funds and their activities appears throughout this document

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### ***“For-Profit Businesses Combat Misperceptions Of Affirmative Action”***

***Management Review***

***By Bill Stack***

Ground-breaking article about affirmative businesses appears in the magazine of the American Management Association. Features the Georgia Department of Human Resources, Minnesota Diversified Industries, Southern Kitchens, Custom Manufacturing Services, North Miami Community Mental Health Center, Winifred Law Opportunity Center, Benchmark Industries, Barrier-Free Construction Co., Polk County Association for Retarded People, the Affirmative Business Alliance of North America, and Alpha Center for Public/Private Initiatives.



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## ***Evolution of the social enterprise industry: 1990 (continued)***

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### ***The Affirmative Enterprise***

***Publisher: MDI Press***

***By John DuRand***

First handbook for affirmative business entrepreneurs



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### **AFFIRMATIVE BUSINESS EXCHANGE PROGRAM WITH THE SOVIET UNION**

***Organized by John DuRand at the invitation  
of public officials and medical authorities in the Soviet Union***

***Participants:***

- John DuRand, Minnesota Diversified Industries (St. Paul)
- Jerr Boschee, The National Center for Social Entrepreneurs (Minneapolis)
- Don Hevey, Mental Health Corporations of America (Jacksonville)
- Bob Russell, Custom Manufacturing (Louisville)
- Wayne Zimmer, SARCAN (Saskatchewan)

In one of the first foreign exchange visits organized after the Central Committee of the Communist Party of the Soviet Union agreed to give up its monopoly of power, five leaders from the North American affirmative business movement spend two November weeks in Moscow, Kiev and Leningrad visiting mental health clinics and rehab centers. Nine months later, five senior medical representatives from Russia and Ukraine reciprocated by traveling to the United States; their visit coincides with the August collapse of the Soviet Union, which they witness on a television set in Minneapolis.

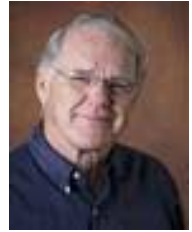
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## ***Evolution of the social enterprise industry: 1992***

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### **CHICAGO GATHERING**

***Organizers: Jed Emerson, Homeless Economic Development Fund  
Gary Mulhair, Pioneer Human Services***



**MULHAIR**

Peer learning and support session for 20 social entrepreneurs

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### **RUSSIAN SMALL BUSINESS DEVELOPMENT CONFERENCE**

***Theme: “Joining the Commonwealth of Independent States,  
North America and Europe to Explore the Power  
of Small Enterprise for Economic Transformation”***

***Conference organizer: Anne Winck-Myers (Business Resource Connection)***

***Location and dates: Moscow (October 19-23)***

***Sponsors:***

- The Government of Moscow, Department of Labour and Employment
- Hewlett Packard Corporation of Europe
- Infocentre International Corporation of Montreal
- Junior Achievement International
- Dynamic Information Systems Corporation (Colorado)

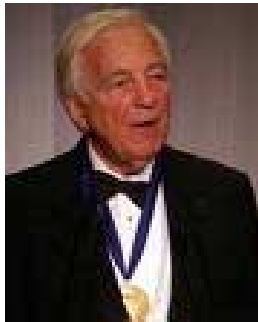
***Keynote speakers:***

- Robert Strauss, United States Ambassador to Russia
- Igor Zaslavski, Moscow Department of Labour and Employment
- Karl Tantscher, HP Business Development Manager for Eastern Europe
- Jerr Boschee, The National Center for Social Entrepreneurs
- John DuRand, Minnesota Diversified Industries
- Carol Pine, Pine & Partners
- Wayne Zimmer, SARCAN (Canada)

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## ***Evolution of the social enterprise industry: 1993***

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### **THE HARVARD BUSINESS SCHOOL SOCIAL ENTERPRISE INITIATIVE**

***John C. Whitehead: \$10 million donation***

***Lead scholars: James Austin,  
Kasturi Rangan, J. Gregory Dees***

First formal academic program in the field and the first course about  
“Entrepreneurship in the Social Sector” (developed by Dees)



AUSTIN



DEES



RANGAN

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## ***Evolution of the social enterprise industry: 1994***

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### ***Handbook of Nonprofit Leadership and Management***

***Publisher: Jossey Bass***

***Cynthia Massarsky*** authors the first chapter about earned income  
and social enterprise in a mainstream publisher’s college textbook



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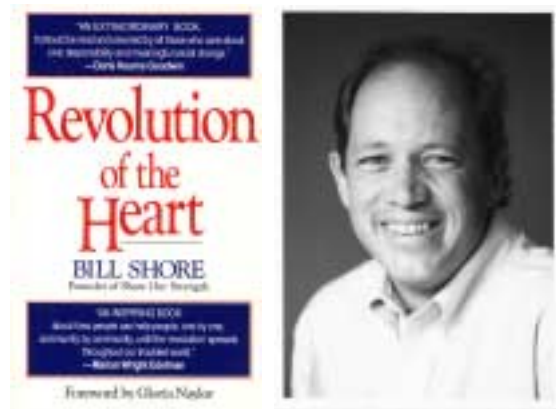
## ***Evolution of the social enterprise industry: 1995***

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### ***Revolution of the Heart***

***By Bill Shore***

Best-selling book by the founder of Share Our Strength brings significant national attention to the field and introduces the concept of “community wealth ventures” to the general public



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***“Social Entrepreneurship:  
Some nonprofits are not only  
thinking about the unthinkable,  
they’re doing it – running a profit.”***

***By Jerr Boschee***

The article in The Conference Board magazine *Across the Board* features Cooperative Home Care Associates, St. Vincent de Paul Rehabilitation Service, The Delancey Street Foundation, America Works, Bidwell Food Services, the American Red Cross Kansas City chapter, Ombudsman Educational Services, Vitas Health Care Corp., Missouri Home Care, and Minnesota Diversified Industries



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## ***Evolution of the social enterprise industry: 1995 (continued)***

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### **ENTREPRENEURIAL STRATEGIC PLANNING DEMONSTRATION PROJECTS**

***Conducted by The National Center for Social Entrepreneurs***  
*(Jerr Boschee, Jim Thalhuber, Mary Lenard)*

First large-scale, multi-year social enterprise consulting project (a four-year effort concluding in 1999) in nine communities -- St. Louis, Milwaukee, Atlanta, New York, Orlando, Columbus, Memphis, Minneapolis/St. Paul and Seattle -- plus 11 state chapters of the National Endowment for the Humanities. Civic Progress, the membership organization for the CEOs of the 28 largest corporations in St. Louis, funds the first project, and the others are supported by local Foundations, corporations and the nonprofits themselves.

Collectively, the ten projects include introductory seminars attended by Board members and senior managers from 600 nonprofits; two-day workshops for teams from 200 nonprofits; entrepreneurial audits of Board members and senior managers from 150 nonprofits; 18-month entrepreneurial strategic planning projects for 60 nonprofits; and 18-month business development projects for 30 nonprofits.

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## ***Evolution of the social enterprise industry: 1996***

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### **THE ROBERTS ENTERPRISE DEVELOPMENT FUND (REDF)**

*Successor to the Homeless Economic Development Fund  
launched in 1990 by the Roberts Foundation*

***George Roberts: Additional \$12 million donation***  
***Executive Director: Jed Emerson***

Focuses on helping eight nonprofits in the San Francisco Bay Area launch businesses to employ people who are homeless or have other barriers to employment

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## ***Evolution of the social enterprise industry: 1996 (continued)***

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### ***New Social Entrepreneurs: The Success, Challenge and Lessons of Non-Profit Enterprise Creation***

***Editors: Jed Emerson and Fay Twersky***



A 400-page report documenting the experience of the Homeless Economic Development Fund and offering initial thoughts about the nonprofit capital market, “social return on investment” (SROI) and related areas of interest. Also includes five case studies and 17 case summaries of the social enterprises started from 1990-1996 by portfolio organizations supported by the Homeless Economic Development Fund.



### **BILL STRICKLAND RECEIVES MCARTHUR FOUNDATION “GENIUS AWARD”**

Founder of Manchester Bidwell Corporation in Pittsburgh is the first social enterprise practitioner recognized by the McArthur Foundation, receiving an unrestricted prize of \$500,000

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## **SOCIAL VENTURE INSTITUTE**

Offering leaders of social purpose businesses and nonprofits a forum in which to air their business problems and receive advice and mentoring. Annual conferences take place at the Hollyhock Leadership Institute in Vancouver.



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## ***Evolution of the social enterprise industry: 1996-7***

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### **CREATING COMMUNITY WEALTH SYMPOSIUMS: “Redefining Civic Responsibility in the New Millenium”**

Share Our Strength founder and CEO **Bill Shore** twice brings together more than 50 leaders in the field to imagine the future of social enterprise

Creating Community Wealth  
Redefining Civic Responsibility  
in the New Millennium  
A symposium sponsored by Share Our Strength  
September 25, 1996



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## ***Evolution of the social enterprise industry: 1997***

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### **PRIME MINISTER TONY BLAIR ENDORSES SOCIAL ENTERPRISE**

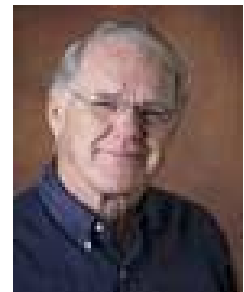
In his first major speech as Prime Minister in June 1997, Tony Blair speaks of the importance of social enterprise to his new administration. According to his Chief Adviser on Social Policy, Geoff Mulgan, Mr. Blair regarded social enterprise as an essential part of the drive towards a more flexible, adaptable State, more in touch with real communities, and better able to make the most of limited resources. During the next decade, the Blair Administration fosters a wide range of programs designed to advance the social enterprise movement (*please see details later in this chronology*).



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### **“OPERATIONAL PHILANTHROPY”**

Gary Mulhair introduces the concept at Pioneer Human Services in Seattle. “Operational philanthropy” occurs when a nonprofit becomes an integral part of a commercial company’s business activity by acting as a manufacturing sub-contractor or by serving as one of the company’s distributors. In essence, the commercial company creates a business relationship with a nonprofit instead of giving it a grant -- it *operationalizes* its philanthropy and therefore becomes dependent on the nonprofit’s performance for its own success.



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## ***Evolution of the social enterprise industry: 1997 (continued)***

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### **COMMUNITY WEALTH VENTURES**

***Founder: Bill Shore***

***Founding Executive Director: Gary Mulhair***



A for-profit consulting subsidiary of Share Our Strength that advises nonprofits, Foundations and corporations. By 2008, The Community Wealth Collaborative, a 10-month business planning process that helps groups of high-performing nonprofits develop and grow social enterprises, had mounted programs in eight geographic areas: Baltimore, Boston, Cleveland, Hartford, Newark, North Texas (Dallas/Ft. Worth), San Antonio and Washington, D.C. – each project includes monthly peer learning sessions plus one-on-one consulting for management teams. In 2006, CWV expands by creating a subsidiary (Social Franchise Ventures) that helps nonprofits develop social franchises (using the structure of a commercial franchise to achieve social goals).

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### ***“Virtuous Capital: What Foundations Can Learn from Venture Capitalists”***

***Harvard Business Review***

***By Christine W. Letts, William Ryan and Allen Grossman***

Influential essay helps spawn the “venture philanthropy” movement



LETTIS



RYAN



GROSSMAN



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## ***Evolution of the social enterprise industry: 1997 (continued)***

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### **NONPROFIT ENTERPRISE SELF-SUSTAINABILITY TEAM (NESsT)**

***Founders: Lee Davis, Nicole Etchart***



First consulting firm to focus on social enterprises in Central Europe and South America. The NESsT Venture Fund arrives in 1999 and another subsidiary, The NESsT University, is an incubator of ideas and initiatives that promote accountability, innovation, leadership and professionalism in the social enterprise field worldwide.



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### **SOCIAL VENTURE PARTNERS (SVP)**

Created by Paul Brainerd (*right*), Scott Oki, Ida Cole, Bill Neukom and Doug and Maggie Walker. They envision a philanthropic community that borrows from venture capital practices and makes highly engaged investments of money, resources and business expertise in local nonprofits, with the aim of developing their capacity and sustainability. SVP also adds an extra dimension -- the goal of educating and mobilizing a community of lifelong, informed, and inspired philanthropists. As of mid-2007, there were 24 Social Venture Partner organizations and more than 1700 Partners in the USA, Canada and Japan who had contributed \$23 million in grants plus countless hours of strategic volunteering to more than 250 nonprofits.



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### **SOCIAL ENTERPRISE DIALOGUE**

***Location: Colorado Springs***

***Organizer and host: Richard Steckel***



The second international gathering convened by Steckel; 60 people from more than a dozen countries attend

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## ***Evolution of the social enterprise industry: 1997 (continued)***

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### ***Enterprising Non-Profits (enp) Program***

***Program Manager: David LePage***

***Headquarters: Vancity Community Foundation***



A funding program that provides matching grants to nonprofits in British Columbia interested in starting or expanding a business. Funded by eight partners: Bell Canada Enterprises, Coast Capital Savings Credit Union, Northern Trust, United Way of the Lower Mainland, Vancity Community Foundation, Vancity Credit Union, Vancouver Foundation, and Western Economic Diversification Canada.

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### ***The rise of the social entrepreneur***

***Publisher: DEMOS***

***By Charles Leadbetter***



Journalist Charles Leadbeater profiles five path-finding social enterprises and their founders: The Bromley-by-Bow Centre (Andrew Mawson), The Mildmay Mission Hospital (Helen Taylor-Thompson), Kaleidoscope (Eric Blakebrough), The Youth Charter for Sport (Geoff Thompson), and The Eldonians (Tony McGann).

Demos is an independent think tank committed to radical thinking about the long-term problems facing the UK and other advanced industrial societies

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### ***“Pulling Their Weight”***

***TWA Ambassador***

***By Bennett Daviss***



Major article about social enterprises in the January issue of the TWA in-flight magazine introduces the concept to millions of flyers. The article features Pioneer Human Services, Citizens Energy, the Delta Foundation, Esperanza Unida, the Newark Performing Arts Center, New Community Corporation, Minnesota Diversified Industries, and The National Center for Social Entrepreneurs.

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## ***Evolution of the social enterprise industry: 1997 (continued)***

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### ***“The New Social Entrepreneurs”***

***Published in who cares magazine,  
(adapted with permission from Inc.)***

***By Heather McLeod***

Featuring Juma Ventures, Osage Initiatives, Pioneer Human Services, TEDI (The Entrepreneurial Development Institute), the Delancey Street Foundation, Manchester Craftsmen’s Guild, New Community Corporation, The Greystone Bakery, Rubicon Programs, and Revelation Corporation of America.



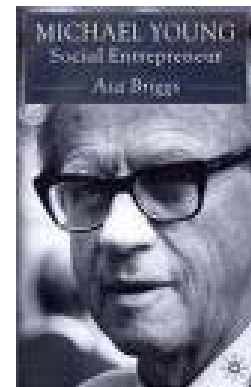
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## **THE SCHOOL FOR SOCIAL ENTREPRENEURS**

***Founder: Sir Michael Young***

***Chief Executives: James Smith (1997-2002)  
Rowena Young (2002-2004)  
Alistair Wilson (2004-present)***

The School for Social Entrepreneurs is designed to help social entrepreneurs create community-engaged, community-shaped social enterprises through a year-long action learning program . Launched in July 1997 with founding donations from HSBC Holdings plc, the National Lottery Charities Board and the Esmée Fairbairn Charitable Trust; welcomed its first group of 22 students in January 1998. By 2008 the School had expanded to six locations, including the original Bethnal Green site in London plus Fife (Scotland), the East Midlands, Belfast, Aston and Liverpool -- and more than 350 Fellows had completed SSE programs.



**SMITH**



**YOUNG**



**WILSON**

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## ***Evolution of the social enterprise industry: 1998***

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### **THE (FIRST) NATIONAL GATHERING FOR SOCIAL ENTREPRENEURS (FORERUNNER OF THE SOCIAL ENTERPRISE ALLIANCE)**

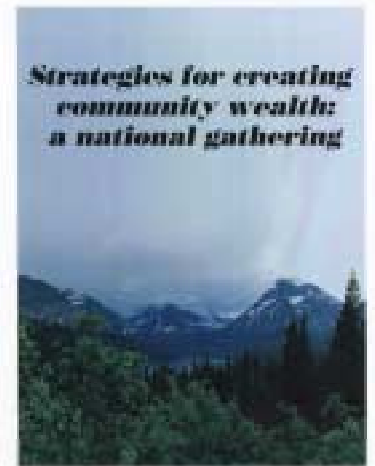
***Co-founders: Jerr Boschee, Jed Emerson, Gary Mulhair,  
John Riggan, Bill Shore and Richard Steckel***

***Lead funders: Annie E. Casey Foundation,  
Roberts Enterprise Development Fund***

***Location and dates: Colorado Springs (November 12-15)***

***Staffed by The National Center for Social Entrepreneurs  
(Jerr Boschee, Jim Thalhuber, Mary Lenard, Rolfe Larson,  
Jan Cohen, Andy Horsnell, Carol Olin)***

***Participants:*** A total of 182 people (92 nonprofit representatives, 19 grantmakers, 16 investors, 47 management assistance providers, six academics, one for-profit company, and one public sector representative)



**BOSCHEE**



**EMERSON**



**MULHAIR**



**RIGGAN**



**SHORE**



**STECKEL**

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### **SALE OF RIVERTOWN TRADING**

#### ***First major acquisition of a social enterprise***

Minnesota Public Radio (MPR) sells its for-profit sister company Rivertown Trading to Dayton Hudson Corporation for \$120 million. MPR nets approximately \$90 million for its existing \$19 million endowment fund. The endowment gives MPR annual income equal to the average \$4 million contribution Rivertown previously made to MPR during the last 10 years of its existence -- about 17 percent of MPR's annual budget.



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## ***Evolution of the social enterprise industry: 1998 (continued)***

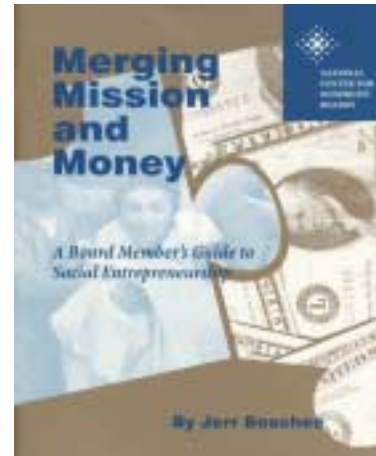
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### ***Merging Mission and Money: A Board Member's Guide to Social Entrepreneurship***

***Publisher: National Center for Nonprofit Boards  
(known today as BoardSource)***

***Author: Jerr Boschee***

First introduction to the field written expressly for Board members; includes "The Mission/Money Matrix,"<sup>®</sup> a strategic-planning tool developed by Boschee in 1989 and field-tested throughout the 1990s by The National Center for Social Entrepreneurs



### **COMMUNITY ACTION NETWORK (CAN)**

***Founders: Adele Blakebrough and Andrew Mawson***

CAN offers management assistance, facilitates peer support, steers social enterprises toward capital financing, and provides shared office space to emerging enterprises. By 2008, it had a membership of more than 850 individuals working in almost every field of social change and service delivery, from homelessness to schools and from healthcare to recycling.



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### **PROJECT 180**

Funded by the Heron Foundation, ***Rachel Newton Bellow*** and ***Richard Anderson*** map the landscape of practitioners, intermediaries and capital markets that lies between the nonprofit and commercial worlds. The Project also includes a theoretical analysis of the terrain and its underlying incentives; a set of case study analyses of successes and failures; and a position paper substantiating the need for an intermediary infrastructure to facilitate arrangements between the nonprofit and for-profit sectors.



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## ***Evolution of the social enterprise industry: 1998 (continued)***

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### **STANFORD UNIVERSITY**

**J. Gregory Dees** leaves Harvard to become Miriam and Peter Haas Centennial Professor in Public Service and formally introduce social enterprise to the West Coast academic community



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**“ENTERPRISING NONPROFITS:  
What do you do when traditional  
sources of funding fall short?”**

***Harvard Business Review***

***By J. Gregory Dees***

In this article, Prof. Dees introduces the five precepts that have defined the larger field of social entrepreneurship ever since:



“Adopting a mission to create and sustain social value, not just private value; recognizing and relentlessly pursuing new opportunities to serve that mission; engaging in a process of continuous innovation, adaptation and learning; acting boldly without being limited by resources currently in hand; and exhibiting a heightened sense of accountability to the constituencies served and for the outcomes created.”

He does not include earned revenue as a necessary prerequisite  
*(please see 2003 response by Jerr Boschee and Jim McClurg)*

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## ***Evolution of the social enterprise industry: 1998 (continued)***

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### **CITY OF SEATTLE STRATEGIC PLANNING OFFICE**

***Coordinator: Mark Pomerantz***

The first formal social enterprise initiative started by a United States government agency. The City of Seattle Strategic Planning Office (SPO) sponsors 20 monthly meetings about social enterprise for a network of 50 nonprofits planning to establish revenue-generating or job-generating businesses -- and also lays the groundwork for development of the Seattle Social Investor Forum. **Pioneer Human Services, Northwest Center Industries** and **the Department of Community Trade and Economic Development of the State of Washington** are key collaborators. SPO also funds several nonprofits to start social enterprises.



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### **“CAUSE-RELATED PURCHASING”**

***Dan McKinnon*** coins the phrase “cause-related purchasing” during his tenure as President and CEO of NISH (formerly National Industries for the Severely Handicapped). It refers to a business relationship in which a commercial company, as part of its ongoing business operations, purchases components or finished piecework provided by a nonprofit.

**social enterprise london**

### **SOCIAL ENTERPRISE LONDON (SEL)**

***Directors: Jonathan Bland (1998-2003)***  
***Allison Ogden-Newton (2003-present)***



Supported by the London Development Authority, SEL has developed a network of more than 500 social enterprises. It has also compiled the UK’s first social enterprise directory, publishes a periodic news bulletin, stages networking events, provides technical support and promotes the entire sector.

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## ***Evolution of the social enterprise industry: 1998 (continued)***

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### **NATIONAL CENTER ON NONPROFIT ENTERPRISE (NCNE)**

***Founder: Dennis Young***



Publications, conferences, seminars,  
training and consulting services for nonprofits

---

### **STERLING COLLEGE UNDERGRADUATE MINOR**

***Sterling, Kansas***

***President: Dr. Ed Johnston***



JOHNSTON

The nation's first undergraduate degree program  
in social entrepreneurship

In 2001, the College receives a \$2.3 million gift from M. D. "Pete" McVay and Mary McVay to renovate a historic building on campus and use it to house the college's new McVay Social Entrepreneurship Center; Mr. McVay, who grew up on a farm in Sterling and later became CEO of Cargill, the world's largest privately held company, also endows a Chair in Social Entrepreneurship. During the same year, Sterling forges a covenant agreement with Habitat for Humanity to train its leaders for the 21<sup>st</sup> century.



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## ***Evolution of the social enterprise industry: 1999***

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### **THE DENALI INITIATIVE**



***Conceived by Bill Strickland***

***Designed by J. Gregory Dees and Donnie Day Pomeroy***

***Executive Director: Donnie Day Pomeroy***

***Funders: The Ewing Marion Kauffman Foundation, Ford Foundation***

A series of 18-month projects over a five-year period, using a national faculty, that takes more than 50 nonprofits through an intensive business planning process

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### **SOCIAL FIRMS UK**

***Chief Executives: Gerry Higgins (founder)  
Sally Reynolds (current)***

Membership organization  
for affirmative businesses  
in the United Kingdom



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### **GLOBAL SOCIAL VENTURE COMPETITION (GSVC)**

The largest and oldest student-led business plan competition launches at the Haas School of Business at UC Berkeley and by 2008 had partnered with Columbia Business School, London Business School, Indian School of Business, and Yale School of Management. The competition is also supported by several outreach partners, including the University of Geneva, ESSEC Business School (France), Thammasat University (Thailand) and a consortium of business schools in Korea. During its first nine years, GSVC awards more than \$300,000 to emerging social ventures, and nearly 25% of past entrants are now operating companies.

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## ***Evolution of the social enterprise industry: 1999 (continued)***

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### **THE INSTITUTE FOR SOCIAL ENTREPRENEURS**

***Founded by Jerr Boschee***

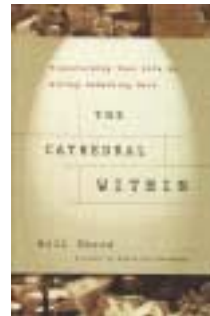
First international consulting firm  
in the field of social enterprise

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### ***The Cathedral Within: Transforming Your Life by Giving Something Back***

***Second national bestseller by Bill Shore***

Includes case studies of social enterprises  
and other pathfinding organizations



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### **FIRST TBLI CONFERENCE (“Triple Bottom Line Investing”)**

***Organized by Brooklyn Bridge***

***Executive Director: Robert Rubinstein***

Today TBLI conferences take place twice each year,  
during May in Asia and during November in Europe



Most participants are investors seeking to place value on a company's  
environmental, social and governance practices; in recent years,  
they have also begun looking at the investment potential of social enterprises

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***Evolution of the social enterprise industry: 1999 (continued)***

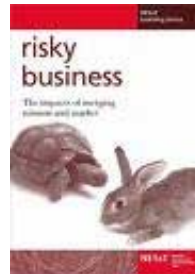
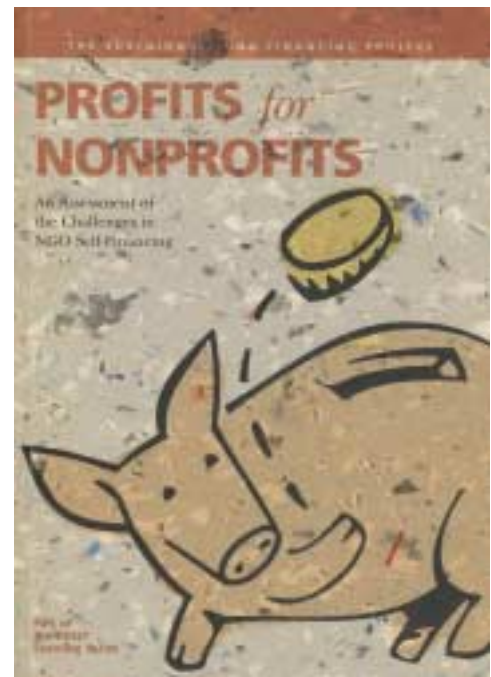
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***PROFITS for NONPROFITS:  
An Assessment of the Challenges  
in NGO Self-Financing***

***Publisher: NESsT***

***By Lee Davis and Nicole Etchart***

First of many subsequent publications  
produced and distributed by NESsT  
(Nonprofit Enterprise Self-Sustainability Team)



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***Unleashing New Resources  
and Entrepreneurship  
for the Common Good:  
A Scan, Synthesis  
and Scenario for Action***

***Publisher: The W. K. Kellogg Foundation***

***By Thomas K. Reis and Stephanie J. Clohesy***



A seminal study of the field as it nears the new millennium



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## ***Evolution of the social enterprise industry: 1999 (continued)***

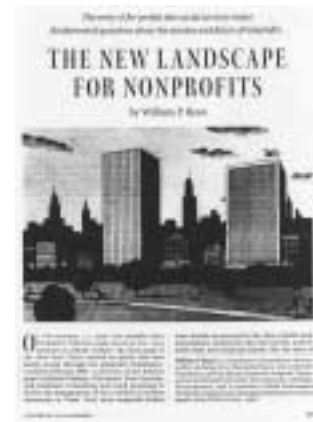
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***“THE NEW LANDSCAPE FOR NONPROFITS:  
The entry of for-profits into social services  
raises fundamental questions  
about the mission and future of nonprofits”***

***Harvard Business Review***

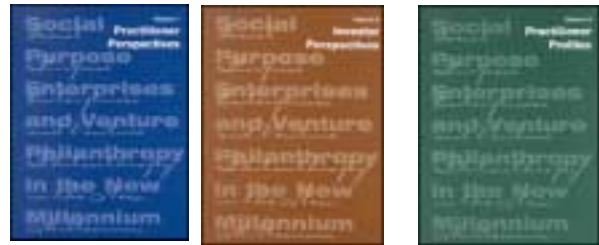
***By William P. Ryan***

A wake-up call for the sector



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***REDF Box Set:  
Social Purpose Enterprises  
and Venture Philanthropy  
in the New Millennium***



The Roberts Enterprise Development Fund and its portfolio members produce a three-volume set to answer three questions. First, practitioners within social purpose enterprises are asked, “If you were starting out again, what would you be interested in learning about and what do you wish you had known?” (*Volume 1: Practitioner Perspectives*). Then, REDF staff and partners provide candid answers to the question, “What is REDF’s approach to venture philanthropy?” (*Volume 2: Investor Perspectives*). Lastly, Teresa Moore tackles the question, “Who is the successful social entrepreneur?” (*Volume 3: Practitioner Profiles*).

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## ***MAKING MONEY WHILE MAKING A DIFFERENCE***

***By Richard Steckel, Robin Simons,  
Jeffrey Simons and Norman Tanen***

Guide for corporations seeking to form business alliances with nonprofits. Chapters cover sponsorship, premiums, licensing, strategic philanthropy and other avenues to improve the corporation’s image and contribute to society while remaining profitable.





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## ***Evolution of the social enterprise industry: 1999 (continued)***

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### **ENTERPRISING SOLUTIONS AWARDS (UK)**

**Sponsors (2008):** *Cabinet Office, Office of the Third Sector  
The Royal Bank of Scotland  
NatWest*

**Host:** *Social Enterprise Coalition*

The Enterprising Solutions Awards will be conferred for the 10<sup>th</sup> consecutive year in 2008. Previous winners:



-- 2007 --

**Overall winner:** Divine Chocolate Company

**Other winners:** Goodwin Development Trust, Haven Products, McSence Group

**Best New Social Enterprise:** Women Like Us

-- 2006 --

**Overall winner:** Sunderland Home Care Associates

**Other winners:** Bulky Bob's, Galeri Caernarfon Cyf, SCA Group

**Best New Social Enterprise:** Green Estate

-- 2005 --

**Overall winner:** Greenwich Leisure Ltd

**Other winners:** Newlife, COPE, Bryson House, Daily Bread

**Best Young Social Enterprise:** Kibble

-- 2004 --

**Winners:** Hackney Community Transport, Community Foster Care, Cafédirect, Baywind, Hill Holt Wood

-- 2003 --

**Overall winner:** Pack-IT Group

**Other winners:** Creggan Enterprises Ltd, Green-Works, Impact Community Developments, Shared Interest Society Ltd

-- 2002 --

**Overall winner:** Brighton & Hove Wood Recycling Project

**Other winners:** Create Liverpool, Jesmond Swimming Project, Ethical Property Company, Blackburne House

-- 2001--

**Winner:** Recycle IT!

-- 2000 --

**Winner:** Tropical Wholefoods

-- 1999 --

**Overall winner:** Furniture Resource Centre

**Other winners:** National Aids Mutual, Makaton Vocabulary Development Project

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***Evolution of the social enterprise industry: 1999 (continued)***

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**ECHOING GREEN ROUNDTABLE DISCUSSION:  
“Leadership Development and Support of Social Entrepreneurs”**

***Convener: Jim Pitofsky, echoing green Foundation***

A follow-up meeting to the first National Gathering for Social Entrepreneurs. Among the 18 participants are representatives of the Drucker Foundation, the Kellogg Foundation, the Kauffman Foundation and the Robin Hood Foundation. One result of the roundtable is creation of SeaChange (*see below*).

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**SeaChange  
(Social Entrepreneurs  
Allied for Change)**

***Executive Director: Jim Pitofsky***

National social enterprise consulting firm  
funded primarily by dot.com companies  
(*please see 2003 Kellogg Foundation report  
about SeaChange’s demise*)



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**FIRST NATIONAL LECTURE SERIES  
ABOUT SOCIAL ENTERPRISE (ENGLAND)**

***Sponsor: National Council for Voluntary Organisations (NCVO)***

***Coordinator: Bill Feinstein***

***Speaker: Jerr Boschee, The Institute for Social Entrepreneurs***

***Sites: London, Liverpool, Leeds***

Founded in 1919, NCVO is the largest umbrella body for the voluntary and community sector in England, with sister councils in Scotland, Wales and Northern Ireland. More than 200 people attend the lecture series.

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## ***Evolution of the social enterprise industry: 2000***

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### **THE SECOND NATIONAL GATHERING OF SOCIAL ENTREPRENEURS** *(followed by formal incorporation of the National Gathering as a 501(c)(3) nonprofit organization)*

***Gathering planning team: Kelvin Shawn Sealey, Jerr Boschee, Charles King***

***Gathering coordinator: Wendy A. Sealey***

***Location and dates: Miami Beach (April 27-30)***

***National Gathering Founding Chair: Charles King***



KELVIN SEALEY



BOSCHEE



KING



WENDY SEALEY

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### ***A Reader in Social Enterprise***

***Editors: Kelvin Shawn Sealey,  
Jerr Boschee, Jed Emerson, Wendy A. Sealey***

Distributed at the 2<sup>nd</sup> National Gathering, the anthology assembles 20 previously published articles and essays about social enterprise



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### ***The Nature of Returns: A Social Capital Markets Inquiry into Elements of Investment and the Blended Value Proposition***

***By Jed Emerson, Bloomberg Senior Research Fellow in Philanthropy,  
Harvard Business School***

Preliminary analysis of the nature and need for “social capital markets” and first exploration of “blended value” as a concept (resulting from research exploring the various connections between the silos of social enterprise, corporate social responsibility, strategic philanthropy and sustainable development)

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## ***Evolution of the social enterprise industry: 2000 (continued)***

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### **The npEnterprise Forum ([www.npEnterprise.net](http://www.npEnterprise.net))**

**Founders: Rolfe Larson and Andy Horsnell**

First listserv in the field; by 2008, more than 5,000 subscribers



LARSON



HORSNELL

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### **VIRTUE VENTURES**

**Founder: Kim Alter**

International consulting firm



***Managing the Double Bottom Line:  
A Business Planning Guide for Social Enterprises***

***Publisher: Save the Children Federation***

***By Kim Alter***

Comprehensive introduction to business planning for NGOs worldwide, including strategies, tactics, examples and worksheets



### **SROI REPORTS**

***Prepared and published  
by the Roberts Enterprise Development Fund (REDF)***

A set of publications calculating the “social” return on investment” (SROI) for each of its portfolio enterprises

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### **THE SOUTHERN CALIFORNIA SOCIAL ENTERPRISE INITIATIVE**

***Coordinator: Center for Nonprofit Management (Bruce Rosen, Project Director)***

Review of the capacity development needs of local nonprofit business enterprises and a strategy to support social purpose business activity throughout southern California. Analyzes more than 75 social enterprises operating in the greater Los Angeles County area and dozens more throughout the region.

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## ***Evolution of the social enterprise industry: 2000 (continued)***

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### **CREATION OF UNLTD\* (UK)**



Seven partner organizations (Ashoka, Changemakers, Community Action Network, Comic Relief, The Scarman Trust, SENSCOT and The School for Social Entrepreneurs) create UnLtd\* to promote and develop social entrepreneurs. By 2008, there are 70 staff members in seven offices throughout England, Wales, Scotland and Northern Ireland. UnLtd's core awards are for entrepreneurs at two levels, those just launching social enterprises and those in the expansion stage. The organization provides cash awards and individually tailored packages of practical support and works with about 1,000 individual social entrepreneurs each year; in 2007, it invests more than £7 million in awards and since its founding has supported more than 4,000 individuals.

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### ***The Nonprofit Sector and the Market: Opportunities & Challenges***

***Publisher: The Aspen Institute***

The Aspen Institute convenes a four-day roundtable discussion entitled "Nonprofits and the Market" in 1999 and later expands its research to include a total of 40 leaders in the field. The resulting report focuses on the trade-offs for nonprofits posed by their increased involvement in commercial activity.



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### **FIRST VENTURE FAIRS FOR SOCIAL ENTERPRISES**

Simultaneously in Seattle, sponsored by Social Venture Partners and the City of Seattle, and in San Francisco, sponsored by Craigslist Foundation

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### **FIRST ONLINE SOCIAL ENTERPRISE MAGAZINE**

***Editor: Mark Pomerantz***



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## ***Evolution of the social enterprise industry: 2001***

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### **UK DEPARTMENT OF TRADE AND INDUSTRY SOCIAL ENTERPRISE UNIT**

Prime Minister Tony Blair creates a Social Enterprise Unit within the UK's Department of Trade and Industry, which is headed by Patricia Hewitt



Barbara Phillips is named first director of the Social Enterprise Unit

Jerr Boschee becomes an advisor to the unit and during the next four years delivers seminars, workshops and consulting sessions in all nine regions of England plus Wales, Scotland and Northern Ireland



**BLAIR**



**HEWITT**



**PHILLIPS**



**BOSCHEE**

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### **ANNUAL REPORTS ABOUT THE STATE OF VENTURE PHILANTHROPY**

***Publishers: The Morino Institute,  
Venture Philanthropy Partners  
and Community Wealth Ventures***



**MARIO  
MARINO**



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## ***Evolution of the social enterprise industry: 2001 (continued)***

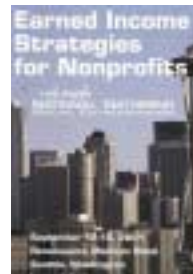
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### **THE THIRD NATIONAL GATHERING FOR SOCIAL ENTREPRENEURS**

**Coordinators: Northland Institute**  
(Scott Martin, Tony Goddard, Dana Stanton)

**Location: Seattle**

**Dates:** Originally scheduled for September 12-15 but postponed until November 28 – December 1 as a result of 9/11. More than 400 people attend.



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### **SOCIAL CAPITAL PARTNERS (Canada)**

**Founder: Bill Young**

Financing and technical assistance  
for Canadian social enterprises



Social | CAPITAL  
PARTNERS

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### **FIRST FULL CHAIR IN SOCIAL ENTERPRISE**

Open University (England, Wales, Scotland)  
-- Prof. Rob Paton



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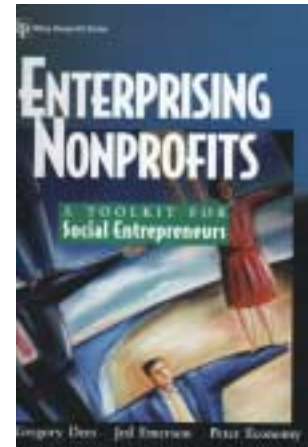
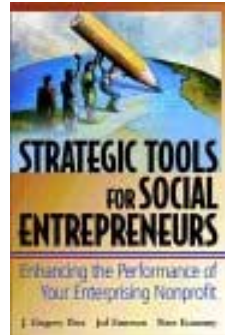
## ***Evolution of the social enterprise industry: 2001 (continued)***

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### ***Enterprising Nonprofits: A Toolkit for Social Entrepreneurs***

***Editors: J. Gregory Dees,  
Jed Emerson and Peter Economy***

Followed in 2002  
by *Strategic Tools  
for Social Entrepreneurs:  
Enhancing the Performance  
of Your Enterprising Nonprofit*



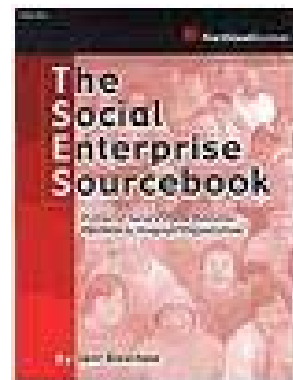
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### ***The Social Enterprise Sourcebook***

***Publisher: The Northland Institute***

***By Jerr Boschee***

Journalistic profiles and factsheets about 14 nonprofits  
that successfully started social enterprises



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## **THE EDGE UPSTARTS AWARDS (UK)**

***Established by New Statesman, a national newspaper,  
and Edge, a charity campaigning for practical learning***

In 2008, the eighth annual awards go to **Lily Lapenna**, Young Social Entrepreneur of the Year; **Carmel McConnell**, Social Entrepreneur of the Year; **Forth Sector**, Social Enterprise of the Year; **Uday Thakkar**, Social Enterprise Mentor of the Year; **Chris Llewellyn**, Social Enterprise Trainee of the Year; and **Beef Kitchen**, The Edge Startup Award.

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## ***Evolution of the social enterprise industry: 2001 (continued)***

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### **SOCIAL ENTERPRISE COALITION**

***Founding Chair: Baroness Glenys Thornton***

***Chief Executive: Jonathan Bland***

Membership organization  
for social entrepreneurs  
in the United Kingdom



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### **THE SOCIAL ENTERPRISE FUND**

***Co-founders: Frank Bennett,  
Jerr Boschee, Jim McClurg***

MCCLURG



Second attempt to start a venture capital firm serving social enterprises.  
Scuttled by 9/11 and collapse of the dot.com boom.

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### **SOCIAL ENTERPRISE PROJECT AT LOUISIANA STATE UNIVERSITY – SHREVEPORT**

***Lead scholar: Prof. Norman Dolch***

***Visiting Professor: Jerr Boschee***

A multi-year series of seminars and workshops for local nonprofits and LSU-Shreveport students; also includes the short-lived Red River Academy for Social Entrepreneurs, a consortium of five academic institutions in Louisiana, Arkansas, Mississippi and East Texas attempting to developing a universal curriculum for nonprofit professionals interested in social entrepreneurship



DOLCH

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## ***Evolution of the social enterprise industry: 2001 (continued)***

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### **THE CAT'S PYJAMAS**

***Founders: Liam Black, Jeremy Nicholls***

Established by FRC Group (Black) and Urban Strategy Associates (Nicholls), The Cat's Pyjamas conducts seminars and other events for social businesses and small- to medium-sized enterprises. In 2002, The Cat's Pyjamas guides 20 UK social entrepreneurs on a two-week Top Cat tour of social enterprises in the United States; a Big Cat tour occurs later in South Africa.



**NICHOLLS**



**BLACK**

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### **SOCIAL ENTERPRISE KNOWLEDGE NETWORK (SEKN)**

***Founding institutions:***

- Escuela de Graduados en Administración y Dirección de Empresas (EGADE)
- Escuela Superior de Administración y Dirección de Empresas (ESADE)
- Harvard Business School (HBS)
- Instituto de Estudios Superiores de Administración (IESA)
- Instituto Centroamericano de Administración de Empresas (INCAE)
- Pontificia Universidad Católica de Chile (PUCCh)
- Universidad de los Andes (Uniandes)
- Universidad del Pacífico (UP)
- Universidad de San Andrés (UdeSA)
- Universidade de São Paulo (USP)

Created to address the need for generating social enterprise intellectual capital in Latin America, SEKN emerges under the leadership of HBS professor James E. Austin, chair of the HBS Social Enterprise Initiative, and colleagues from the other nine schools. The organization concentrates on three primary activities: Collaborative research, education and networking.



**AUSTIN**

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## ***Evolution of the social enterprise industry: 2002***

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### **PITTSBURGH SOCIAL ENTERPRISE ACCELERATOR**

**Founder:** *Martha S. Perry, McCune Foundation*

**Executive Directors:** *Tim Zak (initial)*  
*Gerald Driggs (current)*

Providing technical assistance and links to financing for social enterprises in the Greater Pittsburgh Area

By 2008, the Accelerator portfolio had grown to 45 enterprises



ZAK

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### **ACADEMY OF MANAGEMENT CONFERENCE**



A keynote speech at a pre-conference event by Bill Drayton of the Ashoka Foundation triggers increasing interest in social enterprise. In 2003, the Academy conducts its first All-Academy session about social enterprise (chaired by Norris Krueger, *left*) and in 2004 launches annual symposia/workshops chaired variously by Krueger, Bob D'Intino and Dianne Welsh.

Founded in 1936 by two professors, the Academy of Management is the oldest and largest scholarly management association in the world, with more than 18,000 members in 102 nations.

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### **THE FOURTH NATIONAL GATHERING FOR SOCIAL ENTREPRENEURS**

**Location and dates:** *Minneapolis (December 4-6)*

**Lifetime Achievement Award:** *John DuRand*



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## ***Evolution of the social enterprise industry: 2002 (continued)***

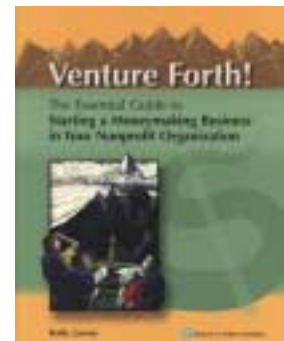
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### ***Venture Forth!: The Essential Guide to Starting a Moneymaking Business in Your Nonprofit Organization***

***Publisher: Fieldstone Alliance***  
*(formerly Wilder Publishing Center)*

***By Rolfe Larson***

A comprehensive guide for nonprofits launching social enterprises, with dozens of worksheets



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### ***Selling Social Change (Without Selling Out)***

***Publisher: Chardon Press***

***By Andy Robinson***

A step-by-step process for starting a social enterprise, including short profiles of two dozen grassroots examples



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### **STUDENTS FOR THE ADVANCEMENT OF GLOBAL ENTREPRENEURSHIP (SAGE)**

***Founder: Curt DeBerg***



“A global community of teenage entrepreneurs sharing a common purpose – to make the world a better place”

*By 2008, more than 20 countries had become members*

Each fall, secondary school students create business ventures, then compete in local, regional, national and international competitions during the following spring and summer



**2007 WORLD CUP WINNERS FROM NIGERIA**



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## ***Evolution of the social enterprise industry: 2002 (continued)***

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### **SOCIAL ENTERPRISE ALLIANCE**

***Created by a merger between The National Gathering for Social Entrepreneurs and SeaChange***

***Chair: Charles King***

***Executive Director: Beth Bubis***

***Senior staff: Jim McClurg, Jim Pitofsky***



McCLURG



PITOFSKY

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### **SOCIAL ENTERPRISE (UK)**

***Editor: Tim West***

First magazine devoted entirely to social enterprise

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### **COMMUNITY INVESTMENT TAX CREDIT (UK)**

Chancellor Gordon Brown introduces draft legislation for a Community Investment Tax Credit to stimulate enterprise in disadvantaged communities

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### **CHARITY BANK (UK)**

Britain's first not-for-profit bank begins accepting deposits from people wishing to have their savings used for loans to charities and social enterprises -- the bank's only business. Charity Bank is an expansion of a community loan fund, Investors in Society, which had already loaned £10 million to 200 voluntary organizations since 1996 (the average borrower had been a medium-sized charity with annual cash flow between £100,000 and £1 million).

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### **SOCIAL VENTURES AUSTRALIA (SVA)**

Supporting a portfolio of nonprofit ventures by providing them with funding, mentoring and organizational tools. SVA also provides services to help strengthen the broader nonprofit sector.

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## ***Evolution of the social enterprise industry: 2003***

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### **YALE SCHOOL OF MANAGEMENT – GOLDMAN SACHS FOUNDATION PARTNERSHIP ON NONPROFIT VENTURES**

***Coordinators: Cynthia Massarsky and Samantha Beinhacker***

***Also sponsored by The Pew Charitable Trusts***



More than 1,500 nonprofits exploring social enterprise enter national business planning competitions sponsored by the Partnership during 2003, 2004 and 2005. Each year, 20 finalists compete for \$500,000 in cash awards and receive the equivalent of \$500,000 in *pro bono* consulting services from Yale School of Management alumni and professionals associated with Goldman Sachs, McKinsey and others (more than 470 volunteer consultants participate during the three-year period). In addition, a total of more than 1,200 practitioners, funders and academics attend the annual conferences conducted jointly with the national finals. Over the course of the three years, 12 social enterprises receive cash awards of \$100,000 and 12 receive \$25,000. The partnership also creates a website of resources for the field (which can now be accessed at [www.socialreturns.org](http://www.socialreturns.org)).



S. BEINHACKER



C. MASSARSKY

#### **Grand prize winners (\$100,000 prizes)**

**2003:** CompuMentor; El Puente Community Development; Guthrie Theatre and The Children's Theatre Company; Rochester Rehabilitation Center

**2004:** Coastal Enterprises; Dakota Area Resources & Transportation for Seniors; the Rescue Mission; VolunteerMatch.

**2005:** EcoLogic Finance; First Book; NPower NY; MissionFish (Points of Light Foundation)

#### **Runners-up (\$25,000 prizes)**

**2003:** Benetech Initiative; Benhaven; Nation's Capital Child and Family Development; Scojo Foundation

**2004:** I Do Foundation; La Casa de Don Pedro; Urban Homesteading Assistance Board; Work Resource Center

**2005:** Caroline Center; Ecotrust; The Housing Partnership Network; Wai'anae Community Re-Development Corporation

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## ***Evolution of the social enterprise industry: 2003 (continued)***

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### **GRANTSMANSHIP CENTER WORKSHOPS**

***Instructors: Rolfe Larson, Michael Whitehead-Bust***

An ongoing series of social enterprise workshops across the country that have continued to this day  
*(taught by the moderators of the npEnterprise Forum)*

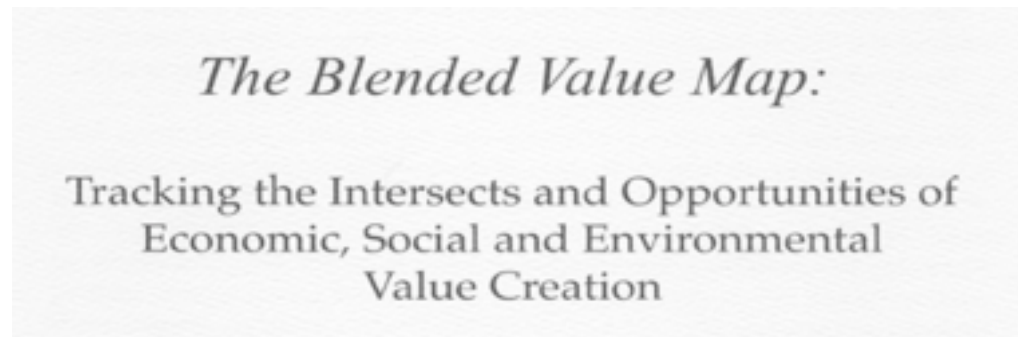


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### ***The Blended Value Map: Tracking the Intersects and Opportunities of Economic, Social and Environmental Value Creation***

***By Jed Emerson***

A seminal essay attempting to blend social and financial returns into a single “value” to help investors better compare one social enterprise to another



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### **FUNDING THEM TO FISH**

***Co-sponsors: Social Enterprise Alliance, Grantmakers for Effective Organizations, UPS Foundation, Sundance Village***

First national gathering devoted exclusively to Foundations and other funders interested in social enterprise -- more than 50 participate. Among other outcomes: A standard lexicon adopted by the Alliance and its members.



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## ***Evolution of the social enterprise industry: 2003 (continued)***

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### **THE NATIONAL URBAN LEAGUE ECONOMIC OPPORTUNITY INSTITUTE**



***Milton Little, Chief Operating Officer***

***Founding Director (2002 – 2003): Maria Black***

***Current Director (2003 – present): Claudia Mchunu***

***Lead consultants/trainers:***

***Jerr Boschee, Jim McClurg, Dr. Charles West***

***Lead funder: The Prudential Foundation***



First national nonprofit association to create a division specifically focused on helping its affiliates develop social enterprises. The initial six-and-a-half day training session takes place in 2003 at George Mason University for the CEOs of 25 NUL affiliates, with a second session in 2006 at Clark Atlanta University for the CEOs of 18. Each training session has been followed by three years of additional support services and financing for the participating affiliates.



**CLASS OF 2003**



**CLASS OF 2006**

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***socialedge.org***

***Created by the Skoll Foundation***

Second major listserv developed for the field



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## ***Evolution of the social enterprise industry: 2003 (continued)***

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### ***A Study of Social Enterprise Training & Support Models***

***Authors: Olszak Management Consulting, Inc.***

*(Lisa M. Olszak and Matthew S. Sidorick,  
with contributions from Robert L. Goldbach and Kate A. Sphar)*



Analysis of 32 social enterprise training and support models from around the United States, 18 community-based and 14 associated with academic institutions

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### ***“Toward a Better Understanding of Social Entrepreneurship”***

***By Jerr Boschee and Jim McClurg***

***Published online***

A response from two leaders in the field of social enterprise to J. Gregory Dees’s 1998 essay that defined “social entrepreneurship” without including earned revenue as a necessary prerequisite

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### ***Building an Organization to Last: Reflections and Lessons Learned from SeaChange***

***Prepared by The W. K. Kellogg Foundation***

A candid look at the reasons for the failure of SeaChange and its subsequent absorption into the Social Enterprise Alliance

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## ***Evolution of the social enterprise industry: 2003 (continued)***

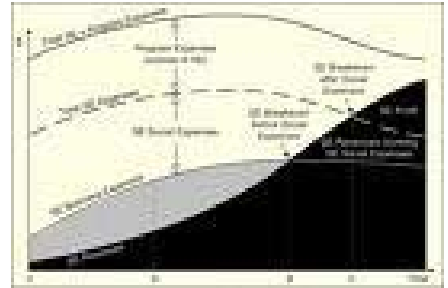
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### ***Social Enterprise: A Typology of the Field Contextualized in Latin America***

***By Kim Alter***

***Sponsored by the Inter-American Development Bank***

A seminal look at the field of social enterprise, with an international perspective



### ***Managing and Measuring Social Enterprises***

***By Rob Paton***

The first book-length, research-based examination of measurement issues

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## **SOCIAL ENTERPRISE COMMITTEE** ***(Southwestern Pennsylvania)***

A coalition of funders, practitioners, technical assistance providers and academics spearhead the social enterprise movement in Southwestern Pennsylvania by focusing on education, financing and advocacy.

The committee operates through 2007, then becomes an advisory board for the Social Enterprise Accelerator (*please see highlights from 2002, above*).



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## ***Evolution of the social enterprise industry: 2003 (continued)***

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### **FUTUREBUILDERS FUND (UK)**

***Initial Fund managers:*** A consortium consisting of Charity Bank, Unity Trust Bank, National Council for Voluntary Organisations and Northern Rock Foundation; the consortium establishes a non-profit company, Futurebuilders England Ltd., to manage the Fund.

***Current Fund managers:*** Adventure Capital Fund (since April 2008)

A government-backed fund offering support and investment to social enterprises and other third sector organizations that deliver public services. Most organizations have never borrowed before, so the Fund offers a combination of loans, grants and professional support designed to help them successfully compete for contracts in the public sector.

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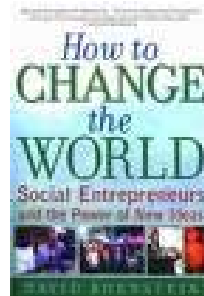
## ***Evolution of the social enterprise industry: 2004***

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### ***How to Change the World: Social Entrepreneurs and the Power of New Ideas***

***Publisher: Oxford University Press, USA***

***By David Bornstein***



International bestseller puts the concept of “social entrepreneurs” on the map. Although Bornstein’s definition of “social entrepreneur” is much broader than those who start social enterprises (and includes such personages as Florence Nightingale), his book changes the tenor and direction of the discussion and is re-issued in 2008.

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## ***Evolution of the social enterprise industry: 2004 (continued)***

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### **CENTRE FOR SOCIAL INNOVATION**

***Co-founders: Tonya Surman, Margie Zeidler***

A convergence hub for social enterprise and social entrepreneurs/innovators in Toronto



**SURMAN**



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### ***Social Entrepreneurship: A Reference Guide***

***Publisher: APERIO***

***Re-issued as “Social Sector  
Entrepreneurship and Innovation”  
in 2007, with additional material***



A concise reference guide for social sector organizations. Each page is a self-contained list of tips, resources or concepts pertaining to a specific topic.

Aperio is an international consulting firm with offices in the United States, Canada and the United Kingdom. Founded in 1998 as John Pepin and Associates, it assumes its current name in 2002 when Pepin partners with Warren Tranquada and John Baker.



**PEPIN**



**TRANQUADA**



**BAKER**

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## ***Evolution of the social enterprise industry: 2004 (continued)***

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### **FIRST CANADIAN SOCIAL ENTERPRISE CONFERENCE**

**Host: United Way of Toronto**

**Dates: November 15-17**

**Keynote speakers: Prime Minister Paul Martin  
Charles King, Chair, Social Enterprise Alliance**

More than 350 people attend the inaugural Canadian conference on social enterprise, during which Prime Minister Martin announces a \$120 million federal initiative to support social enterprise. The initiative is eventually scaled back after his government is defeated but remains an important milestone.

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### **5<sup>TH</sup> GATHERING OF THE SOCIAL ENTERPRISE ALLIANCE**



**Location and dates: San Francisco (March 3-5)**

**Lifetime Achievement Award: Earl Copus**

**Incoming Board Chair: Chuck Lief**



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### ***There's No Business Like Social Business: How to Be Socially Enterprising***

**By Liam Black and Jeremy Nicholls**

Draws upon the authors' years of hands-on social enterprise experience and their encounters with social entrepreneurs throughout the world



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## ***Evolution of the social enterprise industry: 2004 (continued)***

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### **THE SKOLL WORLD FORUM ON SOCIAL ENTREPRENEURSHIP**

***Location and dates: Oxford (March 29-31)***

***Funder: Jeff Skoll***

***Organizers: Alex Nicholls, Rowena Young***



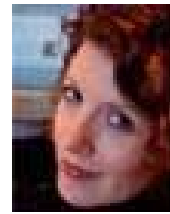
E-Bay co-founder Jeffrey Skoll endows a Chair in social entrepreneurship at Oxford in 2003 and funds the first World Forum in 2004, attended by representatives from more than 20 countries; more than 700 people attend the 5<sup>th</sup> World Forum in 2008. The Skoll Forum focuses on the broader definition of social entrepreneurship but does not exclude social enterprises. Among the keynote speakers during the first five years of the Forum are President Jimmy Carter, Vice President Al Gore and Nobel Peace Prize winner Dr. Muhammad Yunus.



**CARTER**



**NICHOLLS**



**YOUNG**



**SKOLL**

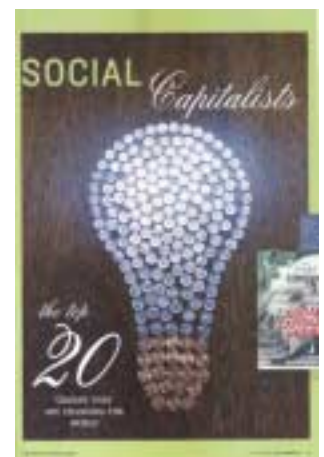
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### **“SOCIAL CAPITALIST” AWARDS**

***First annual awards presented by Fast Co. magazine***

***Lead editor: Cheryl Dahle***

Since 2004, the magazine has presented the awards to at least 20 organizations each year



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## ***Evolution of the social enterprise industry: 2004 (continued)***

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### ***The Social Enterprise Reporter***

***Editor and publisher: Tom White***

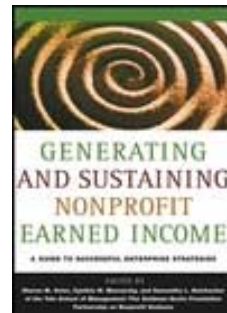
Online magazine devoted exclusively to social enterprise



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### ***Generating and Sustaining Nonprofit Earned Income: A Guide to Successful Enterprise Strategies***

***Editors: Sharon Oster, Cynthia W. Massarsky, Samantha L. Beinhacker***



Lessons learned from the social enterprises competing in the Goldman Sachs/Pew Charitable Trusts/Yale School of Management national business planning competitions

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### ***Double Bottom Line Project Report: Assessing Social Impact in Double Bottom Line Ventures (Methods Catalog)***

***By: Catherine Clark, Columbia Business School  
William Rosenzweig, Haas School of Business  
David Long, Abt Associates  
Sara Olsen, SVT Consulting***

***With support from The Rockefeller Foundation***

Comprehensive analysis of nine different approaches to measuring SROI (“social return on investment”), with concrete examples: Theories of Change as applied by New Schools Venture Fund; Balanced Scorecard as applied by New Profit Inc.; Acumen McKinsey Scorecard as applied by Acumen Fund; Social Return Assessment as applied by Pacific Community Ventures; AtKisson Compass Assessment for Investors as applied by Angels with Attitude; Ongoing Assessment of Social Impacts as applied by REDF; Social Return on Investment as applied by REDF; Benefit-Cost Analysis as applied by Abt Associates and AmericCorps; Poverty and Social Impact Analysis as applied by the World Bank.

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## ***Evolution of the social enterprise industry: 2004 (continued)***

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### **VANCOUVER SOCIAL ENTERPRISE FORUM**

Monthly gatherings of business and nonprofit leaders discussing social enterprise strategies, metrics and stakeholder engagement

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### **CAFEDIRECT PUBLIC SHARE ISSUE**

***Chief Executive: Penny Newman***

Cafédirect successfully executes the UK's biggest ethical public share issue to become a publicly listed company, raising £5 million from 4,500 investors.

The opportunity enables Cafédirect's grower partners, consumers, employees and founders to own a share in the company.



Founded in 1989, Cafédirect today works with 39 grower organizations across 13 developing countries, encompassing 264,666 farmers and directly improving the lives of more than 1.4 million people. Since 2000, the company has invested more than £3.3 million of its profits directly into the businesses and communities of its growers, and paid more than £13 million above market prices for its raw materials.

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### **NYU STERN SOCIAL VENTURE COMPETITION**

Launched to recognize and support the growing number of NYU students and alumni interested in using their business and entrepreneurial skills to create innovative approaches to tackling social problems in the United States and elsewhere. Each year's winners receive a \$100,000 Satter Family Prize named after Stern alumnus Stewart Satter, a successful entrepreneur whose donations support the program.



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## ***Evolution of the social enterprise industry: 2005***

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### **COMMUNITY INTEREST COMPANIES (UK)**



British legislation creating a new form of corporate entity that enables social enterprises to play in the capital markets and allows social investors to receive a financial return from their investments in voluntary and community organizations; 1,400 social enterprises had filed for CIC status by 2008

CICs apply a “community interest test” and “asset lock” which ensure that the CIC is established for community purposes and that the assets and profits are dedicated to those purposes. However, in order to raise investment capital, CICs also have the option of issuing shares that pay a dividend to investors. In order to protect the asset lock, the dividend on these shares is subject to a cap set by the Secretary of State.

The CIC model later influenced development of the L3C model in the United States (*please see 2008 notes, below*).

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### **JIM FRUCHTERMAN RECEIVES MCARTHUR FOUNDATION “GENIUS AWARD”**



Pioneer in using technology to benefit people who are disabled is the second social enterprise practitioner to receive the annual McArthur Foundation \$500,000 unrestricted grant, following Bill Strickland’s selection in 1996

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### ***Profiting from Purpose: Profiles of Success and Challenge in Eight Social Purpose Businesses***

***Prepared for Seedco by Kristen J. McCormack  
(Boston University School of Management) and Sarah M. Eisinger (Seedco)***

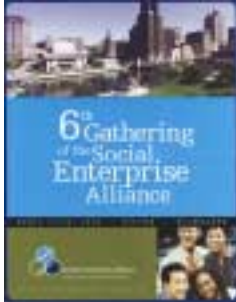
Case studies containing an analysis of the history and context, business strategy and structure, operations, outcomes and next steps for Chicago Children’s Choir, Harlem Textile Works, The Women’s Home, Artists for Humanity, The Delancey Street Foundation, The Fifth Avenue Committee, The Latin American Youth Center and The Food Project

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## ***Evolution of the social enterprise industry: 2005 (continued)***

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### **SIXTH GATHERING OF THE SOCIAL ENTERPRISE ALLIANCE**



***Location and dates: Milwaukee (April 17-20)***

***Social Enterprise Award for Leadership in Financing: Ed Skloot***

***Social Enterprise Award for Leadership in Innovative Ideas: Ruth DeGolia and Benita Singh***

***Social Enterprise Awards for Membership Excellence: Dave Parker, Kathleen Buescher***

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### **SOCIAL ENTERPRISE DAY (UK)**

***Organized by the Social Enterprise Coalition***

First annual gathering of social enterprises in the United Kingdom

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### **SOCIAL ENTREPRENEURS IRELAND**

***Chief Executive: Seán Coughlan***

Launches as a program of The One Foundation; becomes an independent organization in 2007



***ENTERPRISING ORGANIZATIONS:  
NEW ASSET-BASED AND OTHER INNOVATIVE  
APPROACHES TO SOLVING SOCIAL  
AND ECONOMIC PROBLEMS  
(Highlights from a Forum on Social Enterprise)***

***Sponsor: The Aspen Institute Nonprofit Sector and Philanthropy Program***

Summary report from a gathering at the Aspen Institute attended by 40 representatives from entrepreneurial nonprofits, investors, foundation donors, elected officials, scholars, reporters and others to explore social enterprise and make recommendations to advance the field.

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## ***Evolution of the social enterprise industry: 2005 (continued)***

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### **SCOTTISH SOCIAL ENTERPRISE COALITION**

***Chief Executive: Antonia Swinson***

A national collective representing the needs and interests of social enterprise to politicians, policy makers and opinion leaders



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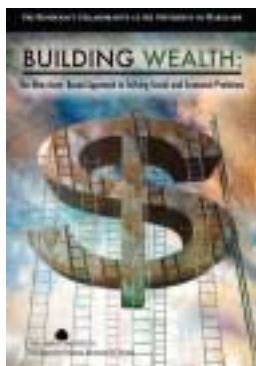
### **THE YOUNG FOUNDATION (UK)**

***Director: Geoff Mulgan***

A think tank that serves as a center for social innovation through practical projects, creation of new enterprises, research and publishing



Formed from the merger of the Institute of Community Studies and the Mutual Aid Centre. The Institute, an urban studies think tank based in East London and founded in 1954, had been the main vehicle through which Sir Michael Young created more than 60 organizations, including the Open University and the Consumers' Association.



### ***Building Wealth: The New Asset-Based Approach to Solving Social and Economic Problems***

***Prepared by The Democracy Collaborative  
at the University of Maryland,  
The Aspen Institute Nonprofit Sector Research Fund  
and Community Wealth Ventures***

Covers a variety of community asset-based approaches: Individual Development Accounts (IDAs), social enterprise, Community Development Corporations (CDCs), CDFIs, cooperatives, Community Land Trusts, Employee Stock Ownership Plan companies (ESOPs), municipal enterprise, and state and local investment strategies

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## ***Evolution of the social enterprise industry: 2005 (continued)***

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### ***BUSINESS PLAN PRO: The Social Enterprise Edition***

***Producer: Jim McClurg***

***Publisher: Social Enterprise Alliance***

First interactive, digital business planning guide designed specifically for social enterprises

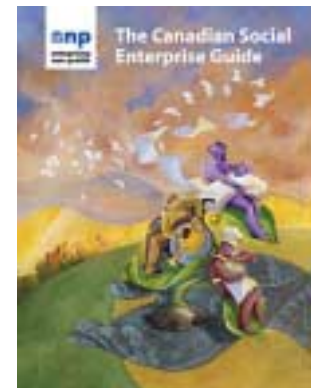


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### ***The Canadian Social Enterprise Guide***

***Publisher: Enterprising Non-Profits Program  
(please see 2001 highlights, above)***

Eight chapters for Canadian nonprofits and co-operatives providing an overview of social enterprise, a snapshot of social enterprise in Canada, an outline of the enterprise development process, the legal context, measurement techniques, and other subjects



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### **FIRST INTERNATIONAL SOCIAL ENTREPRENEURSHIP RESEARCH CONFERENCE (Barcelona)**



***Organizers: Johanna Mair, Jeff Robinson***

Followed by a 2006 conference at NYU and a 2007 conference in Copenhagen. The 2009 conference (site to be determined) will follow publication in January 2009 of *International Perspectives on Social Entrepreneurship*, edited by Robinson, Mair and Kai Hockerts.



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## ***Evolution of the social enterprise industry: 2006***

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### **NOBEL PEACE PRIZE: DR. MUHAMMAD YUNUS**

Founder of Grameen Bank,  
the first micro-finance organization



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### **LOUISIANA OFFICE OF SOCIAL ENTREPRENEURSHIP**

***Prime movers: Lt. Gov. Mitch Landrieu  
and social enterprise consultant Andrew Wolk***

First state to establish  
an office dedicated to social entrepreneurship



WOLK



LANDRIEU

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### **SEVENTH GATHERING OF THE SOCIAL ENTERPRISE ALLIANCE**

***Location and dates: Atlanta (March 7-10)***

***Award for Leadership in Innovative Enterprise Ideas:  
Katherine Freund***

***Social Enterprise Award for Leadership in Funding:  
The UPS Foundation***

***Social Enterprise Award for Member Excellence:  
Dave McDonough***



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## ***Evolution of the social enterprise industry: 2006 (continued)***

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### ***Social Entrepreneurship: New Models of Social Change***

***Editor: Alex Nicholls***

***Publisher: Oxford University Press***



Anthology concentrating exclusively on social enterprise, primarily for the academic market. Contributors include Muhammad Yunus, Bill Drayton, Rowena Young, Geoff Mulgan, Alex Nicholls, Albert Hyunbae Cho, Paola Grenier, Beth Battle Anderson, J. Gregory Dees, James E. Austin, Herman B. Leonard, Ezequiel Reficco, Jane Weis Skillern, Doug Foster, Sutia Kim Alter, Charles Leadbeater, Alex Jacobs, Gordon M. Bloom, Sally Osberg, Pamela Hartigan, Jerr Boschee and Jed Emerson.

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### ***Migrating from Innovation to Entrepreneurship: How Nonprofits are Moving toward Sustainability and Self-Sufficiency***

***By Jerr Boschee***



Award-winning book describes the basic principles and critical success factors associated with social entrepreneurship. Also includes ***A Practical Lexicon for Social Entrepreneurs*** that defines more than 80 key terms, many in the form of mini-tutorials; a bibliography of print publications; and a list of annotated links to online resources.

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## **SOCIAL ENTERPRISE INSTITUTE**

***Founded by Mark Van Ness***

***Executive Director: Dave McDonough***



**VAN NESS**



**MCDONOUGH**

“CEO Clubs” for social enterprises;  
by 2008 had grown to include ten sites  
in California involving more than 115 members



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## ***Evolution of the social enterprise industry: 2006 (continued)***

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### **SOCIAL ENTERPRISE LOAN FUND (SELFund)**

**Founder:** *Mark Van Ness*

A syndicate of donor advised funds providing credit enhancement and financing to social enterprises. The SELFund has participated in more than \$22 million in financing for charitable organizations since 2006.

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### ***Research on Social Entrepreneurship: Understanding and Contributing to an Emerging Field***

**Publisher:** *ARNOVA*  
(Association for Research  
on Nonprofit Organizations  
and Voluntary Action)



**Editor:** *Rachel Mosher-Williams*

Comprehensive scan of past and recommended research in the field

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### ***“THE GREAT DEBATE” RESOLVED***

The historical confusion about the definition of “social entrepreneurship” has been called “The Great Debate” by faculty members at the University of Oxford. Prof. J. Gregory Dees defined the term in his 1998 *Harvard Business Review* essay without including earned revenue as a prerequisite; Jerr Boschee and Jim McClurg responded in 2003 by labeling it a necessity.

An essay by Dees and Beth Battle Anderson in 2006 called for a resolution of the issue by suggesting that the competing definitions be referred to as the “social innovation school” and the “social enterprise school.” Boschee endorsed the suggestion in a subsequent essay and further recommended that henceforth “social entrepreneurship” be used as an umbrella term encompassing both schools.

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## ***Evolution of the social enterprise industry: 2006 (continued)***

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### **VICE-PRESIDENT AL GORE PREMIERES *An Inconvenient Truth* AT THE SKOLL WORLD FORUM**

***Producer: Participant Productions (Jeff Skoll)***

Vice-President Gore's dramatic film later wins the Academy Award and is used by thousands of volunteers worldwide to spread the message of global warming



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### ***Wise Decision-Making in Uncertain Times: Using Nonprofit Resources Effectively (Nonprofit Management Guides)***

***Edited by Dennis R. Young***

One of many publications issued  
by The National Center on Nonprofit Enterprise



### ***Social Entrepreneurship***

***Edited by Johanna Mair,  
Jeffrey Robinson and Kai Hockerts***

A framework for research in the field

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### ***“For Profit or for Purpose?”***

***Associations Now***

***By Bill J. Harrison***

Article in the monthly magazine published by the American Society of Association Executives (ASAE) explores the relevance of social enterprise to associations



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## ***Evolution of the social enterprise industry: 2006 (continued)***

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### **THE UNIVERSITY NETWORK FOR SOCIAL ENTREPRENEURSHIP**

***Founders: Ashoka, Skoll Centre for Social Entrepreneurship, Social Enterprise Knowledge Network, European Research Network (EMES)***

The University Network for Social Entrepreneurship works with professors and researchers, practitioners, and students to develop social entrepreneurship as a vocation and carry its principles into other disciplines and sectors

Designed to be a resource hub and an action-oriented discussion forum to expand social entrepreneurship education and participation around the world



**SKOLL CENTRE**  
FOR SOCIAL ENTREPRENEURSHIP



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## ***Evolution of the social enterprise industry: 2007***

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### **GOOD CAPITAL**

***Co-founders: Kevin Jones, Tim Freundlich, Joy Anderson***



JONES



FREUNDLICH



ANDERSON

Third attempt to create a venture capital fund devoted exclusively to social enterprises (following failed efforts in 1987 and 2001 by the Beacon Fund and the Social Enterprise Investment Fund); first closing (\$7.5 million) and initial investment announced in March 2008; ultimate goal is \$30 million



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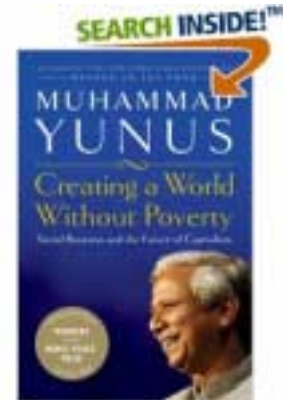
## ***Evolution of the social enterprise industry: 2007 (continued)***

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### ***Creating a World Without Poverty***

***By Muhammad Yunus***

*Booklist*: “The influential economist and winner of the 2006 Nobel Peace Prize outlines his vision for a new business model that combines the power of free markets with the quest for a more humane world.”

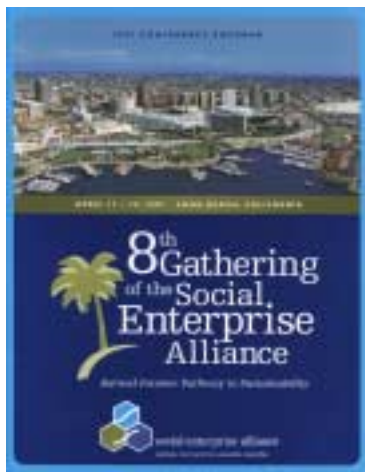


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### ***The Limits of Social Enterprise: A Field Study & Case Analysis***

***Publisher: Seedco Policy Center***

A perspective on social enterprise filtered through a detailed assessment of a Seedco childcare initiative. The report triggers coverage in the *Wall Street Journal*, followed by reactions from leaders in the field of social enterprise who argue Seedco draws macro conclusions from micro experiences.



### **EIGHTH GATHERING OF THE SOCIAL ENTERPRISE ALLIANCE**

***Location and dates: Long Beach, California (April 17-19)***

***Social Enterprise Leadership Award: Barbara Massey***

***Social Enterprise Community Visionary Award: Dr. Lula Ballton***

***Social Enterprise Innovation Award: Chandler Arnold***

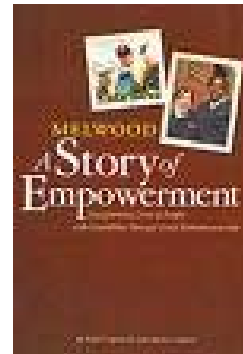
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## ***Evolution of the social enterprise industry: 2007 (continued)***

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### ***Melwood: A Story of Empowerment***

***By Earl Copus, Jr.***



An autobiographical history of one of the country's leading social enterprises: During a 40-year career, Copus built Melwood into a \$71 million nonprofit business empowering people with developmental disabilities

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## **SOCIAL ENTERPRISE INVESTMENT FUND (UK)**

\$100 million fund established by the UK government for investment over a four-year period in new and existing social enterprises delivering health and social care services. The government defines a social enterprise as “a business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximize profit for shareholders and owners.”

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### ***Nothing Ventured, Nothing Gained: Addressing the Critical Gaps in Risk-Taking Capital for Social Enterprise***

***Publisher: Saïd Business School (Oxford University)***

***By Jed Emerson, Tim Freundlich and Jim Fruchterman  
(with Loren Berlin and Keely Stevenson)***

An overview and analysis of funding gaps within the social enterprise arena, with recommendations

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## ***Evolution of the social enterprise industry: 2007 (continued)***

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### **THE ARTHUR BOSCHEE AND EVELYN BALL INTERNATIONAL AWARDS FOR SOCIAL ENTERPRISE**

***Funders: Jerr Boschee, Linda Ball,  
Ken Boschee, Jean Boschee,  
Christopher Klose and Claudine Klose***



Presented annually at the World Cup competition sponsored by SAGE (“Students for the Advancement of Global Entrepreneurship”) to businesses started by secondary school students that best integrate social and financial objectives

The 2007 Gold Medal winning team (*pictured above with Jerr Boschee*) came from the Philippines, the Silver Medal winners from China and the Bronze Medal winners from Russia

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### ***“Social Entrepreneurship and Government: A New Breed of Entrepreneurs Developing Solutions to Social Problems”***

***Publisher: Small Business Administration (SBA)***

***By Andrew Wolk***



Wolk’s chapter in the SBA’s annual report to the President of the United States offers an introduction for city, state, and federal government officials to the field of social entrepreneurship and the work that has been accomplished to date. The chapter incorporates insights from experts in the field and case studies of eight successful social-entrepreneurial initiatives to address three questions: (1) What is social entrepreneurship? (2) How does social entrepreneurship help government benefit Americans? (3) How is government currently supporting social-entrepreneurial initiatives?



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## ***Evolution of the social enterprise industry: 2007 (continued)***

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### **SECOND CANADIAN CONFERENCE ON SOCIAL ENTERPRISE**

***Location and dates: Vancouver (January 28-31)***

***Host: Enterprising Nonprofits Program (enp)***

Attended by more than 500 people

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### **SOCIAL ENTREPRENEURSHIP SUMMIT (CANADA)**

***Location and dates: Toronto (December 3-4)***

***Hosts: Organized by the Boston Consulting Group  
in partnership with the Centre for Social Innovation,  
MaRS Discovery District and the Toronto City Summit Alliance***

Attended by more than 250 social enterprises and social entrepreneurs

The logo for Boston Consulting Group (BCG), featuring the letters 'BCG' in a green, serif font.

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### **THE YOUNG FOUNDATION INNOVATION FUNDS (UK)**

***Health Innovation Accelerator  
Learning Launchpad***

Incubators established for new enterprises in health and education

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### ***“Social Entrepreneurship: The Case for Definition”***

***Stanford Social Innovation Review***

***By Roger L. Martin & Sally Osberg***

The authors offer their definition of “social entrepreneurship,” which does not include earned revenue as a prerequisite

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## ***Evolution of the social enterprise industry: 2007 (continued)***

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### **INTERNATIONAL SOCIAL FIRMS ALLIANCE (ISFA)**

**Founder:** *Social Firms UK*

An online area where people and organizations can meet virtually to discuss and share common issues and best practice



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## ***Evolution of the social enterprise industry: 2008***

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### **SOCIAL ENTERPRISE WORLD FORUM**

**Co-sponsors:** *Scottish Enterprise*  
*Social Enterprise Alliance (USA)*  
*Social Enterprise Coalition (UK)*  
*Social Ventures Australia*

**Coordinators:** *CEiS (Chief Executive: Gerry Higgins)*

First international conference exclusively for social enterprises



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### **THE INNOVATION EXCHANGE (UK)**

**Chair:** *Baroness Glenys Thornton*

The UK government's new program is charged with bringing innovators from the public and voluntary sectors together with social investors to solve social problems. The three-year, \$2.4 million pilot program will promote collaboration and provide tailored support for organizations with the most promising ideas.



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## ***Evolution of the social enterprise industry: 2008 (continued)***

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### **SOCIAL STOCK EXCHANGE (UK)**

***Developers: Mark Campanale and Pradeep Jethi***

***Feasibility study seeded by The Rockefeller Foundation***



**CAMPANALE**

Rockefeller contributes \$500,000 to studying the viability of a “social stock exchange” in the United Kingdom. The market would allow investors to trade shares in projects that seek to preserve the environment, such as clean technology, and that promote health care, aid for the poor, or other social goals. If there is sufficient demand, the market will be launched in 2009.

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### **LOW-PROFIT LIMITED LIABILITY COMPANY (L3C)**

***Sponsors: Mary Elizabeth and Gordon B. Mannweiler Foundation, Council on Foundations, Ashoka: Innovators for the Public, and the legal firm of Caplin & Drysdale***

Vermont passes legislation approving a new type of limited liability corporation called an L3C that allows Foundations, individuals, government agencies, nonprofits and private sector companies to invest in social enterprises, with Foundations taking the bulk of the risk. North Carolina’s legislature considers similar legislation and feasibility studies are underway in several other states.

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### **SOCIAL ENTERPRISE COUNCIL (CANADA)**

Think tank dedicated to strategically enabling social enterprise in Canada by concentrating on three areas: Public policy (procurement, access to capital and legal frameworks), shared learning and best practices (conferences and forums), and research and promotion (mapping, web sites and newsletters).

The Council will host the third Canadian Conference on Social Enterprise in 2009.

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## ***Evolution of the social enterprise industry: 2008 (continued)***

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### **NINTH SOCIAL ENTERPRISE SUMMIT**

***Coordinator: Social Enterprise Alliance***

***Location and dates: Boston (March 9-11)***

***Social Enterprise Innovation Award:  
Enrique Balaguer***



**BROMBERGER**



***Social Enterprise Leadership Award: Allen R. Bromberger***

The award to Bromberger recognizes his leadership in providing legal assistance to social enterprises nationwide. Other attorneys who have played a significant *pro bono* role during the past 30 years include ***Bruce Hopkins, Jennifer Reedstrom-Bishop*** and ***Robert Wexler***.

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### ***Business Planning for Enduring Social Impact: A Social-Entrepreneurial Approach to Solving Social Problems***

***Publisher: RootCause***

***By Andrew Wolk and Kelly Kreitz***



A handbook for startups outlining a four-step business planning process

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### **social innovation eXchange (SIX)**

***Founder: The Young Foundation***

A field-building network launched with events in Lisbon, Brussels, Beijing, Singapore, Sydney and San Francisco. Several hundred organizations are currently involved.



One of SIX's major events is the "Summer School on Social Innovation" in Spain, co-sponsored by The Young Foundation and the Mondragon Group, the world's largest social enterprise. The 2008 event draws 100 participants from around the world to San Sebastian.

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## ***Evolution of the social enterprise industry: 2008 (continued)***

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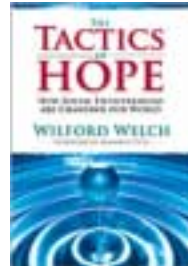
### ***The Tactics of Hope: How Social Entrepreneurs Are Changing Our World***

***Publisher: Earth Aware Editions***

***By Wilford Welch***

***Contributing editor: David Hopkins***

***Foreword by Desmond Tutu***



Profiles of 27 social entrepreneurs from around the globe

*www.tacticsofhope.org web site released simultaneously*

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### **FIRST BAME SOCIAL ENTERPRISES CONFERENCE (UK)**

***Host: Social Enterprise Coalition***

The first event connecting Black, Asian and Minority Ethnic (BAME) social enterprises, both established and emerging

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### **FIRST SOCIAL ENTERPRISE ALLIANCE LOCAL CHAPTERS**

Social enterprises in St. Louis and Chicago create the first local chapters affiliated with the Social Enterprise Alliance

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### **NORTHERN IRELAND TOUR OF BOSTON SOCIAL ENTERPRISES**

***Sarah Mackey*** of ***Business in the Community*** guides 20 Northern Ireland entrepreneurs through a week-long visit to six social enterprises in Boston

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### **CINCINNATI WORKING GROUP**

***Organizers: Andy McCreanor and Sharon Fusco***

A group of people from the public, private, nonprofit and academic sectors meets on a regular basis to create a hub for social enterprise activity in the Greater Cincinnati area



***This chronology will be updated every summer:  
Please e-mail any corrections, amplifications  
or additions to [institute@orbis.net](mailto:institute@orbis.net)***

***Thank you!***

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