

## The Role of Social Enterprise in Creating Work Options for People With Intellectual and Developmental Disabilities

### Abstract

*It has been broadly acknowledged that supported, inclusive employment can promote independence, quality of life and social integration for people with intellectual and developmental disabilities (IDD). Despite the ongoing development of the individual placement and support model of supported employment, competitive employment rates for this population remain low. Social enterprise is a means of enhancing employment participation through the creation of jobs and job training in competitive community businesses in the "3<sup>rd</sup> sector." This study used a case study methodology to examine practices of successful social enterprises for workers with IDD that led to both sustainable business ventures and promote desired social outcomes. Four Ontario and one Alberta work integration social enterprises (WISE) provided the primary data sources. Cross-case analysis revealed a number of tensions and challenges as agencies strive to meet provincial employment standards while running successful businesses and honouring worker need for choice and social inclusion. Results include identification of best practices and key outcome indicators for successful ventures at individual, business and community levels.*

Considerable attention has focused on efforts to improve the persistently low employment participation of people with intellectual and developmental disabilities (IDD) (Ellenkamp, Brouwers, Embregt, Joosen, & van Weeghel, 2016; Santilli, Nota, Ginevra, & Soresi, 2014). These efforts are rooted in principles of normalization (Wolfensberger, 2011) and human rights (United Nations, 2006), and the role of inclusive employment in promoting independence, quality of life and social integration (Kocman & Weber, 2016; Lysaght, Petner-Arrey, Howell-Moneta, & Cobigo, 2016).

One approach to improving employment participation is work integration social enterprise (WISE), also known as social firms, affirmative businesses, social cooperatives, and social purpose businesses. WISEs are a specific type of social enterprise with a primary purpose of providing job training and/or creating jobs for work-disadvantaged populations (Chan, Ryan & Quarter, 2017); O'Connor & Meinhard, 2014). WISEs have dual social and revenue generation goals, producing goods and services for trade in the regular marketplace while also striving to improve economic and social conditions for populations who face challenges with self-sufficiency (Quarter, Mook, & Armstrong, 2009). These populations

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include people who have encountered poverty and/or homelessness, marginalized youth, Aboriginal communities, ethnic minorities, women, seniors, and people with disabilities, including mental, physical, and intellectual disabilities (Kidd & McKenzie, 2014).

In the IDD field, non-profit organizations have a long history of entrepreneurship and employment activities for their clients. This has often taken the form of sheltered workshops. Once commended for providing productive work and a safe and social environment, in the 1980s there was a movement away from sheltered workshops due to a philosophical shift toward social inclusion, normalization, and social role valorization (Caruso & Osburn, 2011; Galer, 2014; Katz, 2014). In Ontario, the social enterprise model for people with IDD started to appear in the mid-1990s and early 2000s (Lysaght, Krupa, & Bouchard, 2015). A recent policy move by the Province of Ontario to advance a social enterprise strategy (O'Connor & Meinhard, 2014) as well as a 2015 imperative by the Ministry of Community and Social Services (MCSS) that transfer funding agencies should discontinue sheltered workshops (MCSS Community Supports Policy Branch, 2015) has garnered further interest in the social enterprise model.

Currently, the most accepted intervention strategy to improve employment outcomes is supported employment, and in particular the individual placement and support model (Kirsh, Krupa, Cockburn, & Gewurtz, 2010). Supported employment programs seek to place workers in competitive workplaces, train them relative to specific job demands, accommodate performance differences, and provide ongoing support (Bond, 2004). Issues related to choice and social inclusion are difficult to address in this model, due to the inherent problem of matching a worker with a limited skill set to available jobs in a competitive and shrinking job market. In fact, few programs have used worker satisfaction and inclusion as outcome metrics (Lysaght, Cobigo, & Hamilton, 2012). Recently the wisdom of supported employment as the primary or exclusive entry point to employment has been questioned, based on the failure of this model to adequately meet the needs of a diverse population (Hall, 2009; Lysaght et al., 2016; Wilton, 2004). In this context WISEs are emerging as another alternative.

Questions have been raised as to the role of WISEs relative to their contributions to civil society and community integration for people in marginalized groups (Cooney, Nyssens, O'Shaughnessy, & Defourny, 2016) including those with IDD. For example, within these enterprises there exist no guidelines to ensure that current imperatives around fair and inclusive employment are met. This means that there are no standards to guarantee that workers are provided opportunities to build connections with the larger community, exercise choice relative to work options, build competitive work skills, or increase their access to and success in entering other community work options. In Ontario, the WISE sector is highly diverse due to a broad range of operational models, forms of incorporation and funding sources (Brouard, McMurtry, & Vieta, 2015), and this diversity is evident in the intellectual disability sector.

While the benefits of WISE as a means of enhancing the employability of marginalized populations in Canada have been reviewed (Lysaght & Krupa, 2011; Krupa, Lysaght, Vallee, & Brown, 2013), their contributions to the lives of people with IDD and the local communities in which they live and work have not been widely examined. Studies in Europe and the United Kingdom have demonstrated the contributions of WISE to engaging marginalized groups and moving them towards conventional employment and higher incomes (O'Connor & Meinhard, 2014), while some Canadian studies have focused on the social and economic benefits of WISE (Chan, 2016; Chan, Ryan & Quarter, 2017). Most of these studies, however, have focused on mental health populations, and there has been limited focus on WISEs that provide long term employment rather than transitional programming. The present study was intended to enhance understanding of the advantages and challenges associated with IDD-focused WISEs and to promote ongoing refinement and evolution of the model within the Canadian context.

## Methods

Using a concurrent, multiple case study approach (Yin, 2014), we identified five "cases" – individual WISEs purposefully selected to inform the key research questions, including:

1. What conceptual models/philosophies have guided the development of WISEs for persons with IDD?
2. What factors have contributed to promoting and defining these enterprises?
3. What policies and structures contribute to or detract from the establishment of WISEs?
4. What factors contribute to the success and survival of WISEs?
5. What strategies promote choice, independence and social inclusion for workers?
6. What does social inclusion look like in these varied contexts?

The study was reviewed and received ethical clearance by the Queen's University Health Sciences Research Ethics Board.

## Data Sources

Cases were purposively selected from a national catalogue of WISEs for people with IDD developed in this study's first phase (Lysaght et al., 2015). Included enterprises had been established for a minimum of 2 years and served a primary population of persons with IDD. Selection of the WISEs was intended to create a maximum diversity sample, and as such the cases were varied based on funding sources, historical development, geographical location, type of commercial activity, and wage structure in order to create a rich and varied snapshot of the WISE sector. The focus of the study was on enterprises operating in the Province of Ontario, but one out-of-province (i.e., Alberta) WISE was selected to provide a point of comparison (since employment policies are largely set at the provincial level). A profile of the selected WISEs appears in Table 1.

## Data Collection

Each individual case study involved a range of data sources, including interviews, organizational documents, observation, and focus groups. Interviews of about 30 minutes were conducted with employees with IDD, supervisory staff, board members, and customers and followed semi-structured interview protocols developed for each participant category. Longer interviews (120 minutes or more) were

held with business managers and executive directors. Key documents reviewed included articles of incorporation, annual reports, balance sheets, publicly available web pages and marketing materials.

## Data Analysis

As recommended by Yin (2014) for multiple case designs based on replication logic, each case was analyzed independently using line-by-line review of interview transcripts, observation reports, and key company documents. The analysis dissected emergent descriptive and explanatory themes that we identified relative to the research questions. Case summaries were developed and data display matrices of emergent themes were constructed. Findings relative to each case were provided to the staff of each WISE, and discussed in a collaborative manner to both share our observations and confirm interpretations. The second stage of analysis compared and contrasted the emergent theme tables using cross-case comparison. Common trends, points of tension and challenges, and unique approaches were identified across cases. The initial thematic findings were presented to members of our partner organization, the Ontario Disability Support Network (ODEN), a provincial network of employment service providers (ODEN 2018). Discussion with this group assisted interpretation and organization of findings.

## Results

The cross-case analysis yielded eight major themes that summarize the primary findings. These themes highlight key issues that emerged as being salient to the use of social enterprises as a means of addressing the employment needs of people with IDD.

## Structural Models

Business structures influence how philosophy and values are operationalized and how goals and objectives are achieved. In addition, legal business structures protect individuals involved in the enterprise from potential liabilities and risks associated with the work of the WISE, and influence the nature of the relationships with a sponsor or affiliated organizations. The WISEs

*Table 1. Profile of Participating WISEs*

<i>Case #</i>	<i>Incorporation Model</i>	<i>Nature of Business(es)</i>	<i>Setting</i>	<i>Annual Revenues*</i>
1	Co-operative	<ul style="list-style-type: none"> <li>• Baked goods production</li> <li>• Catering</li> <li>• Coffee kiosks</li> <li>• Toy sterilization</li> </ul>	Large urban; multi-site	\$190,000
2	Multi-business organization under overarching structure and board of directors. Arm's length relationship to an IDD social service organization.	<ul style="list-style-type: none"> <li>• Wood furniture production</li> <li>• Restaurants/cafés</li> <li>• Copying/printing</li> <li>• Recycling</li> <li>• Furniture restoration</li> <li>• Packaging</li> <li>• Farm workers</li> <li>• Printing business</li> </ul>	Rural - regional municipalities	\$505,000
3	Multiple businesses operated by parent IDD service provider, not separately incorporated, but with separate books. One manager for all businesses reports to agency executive director, who reports to board of directors.	<ul style="list-style-type: none"> <li>• Wood products</li> <li>• Gift shop</li> <li>• Event catering</li> <li>• Janitorial contracts</li> <li>• Coin laundry</li> <li>• Rental income properties</li> </ul>	Small urban setting; multiple locations	\$342,100
4	Single business operated by parent IDD service provider, not separately incorporated, but with separate books. Manager reports to agency executive director and board of directors	<ul style="list-style-type: none"> <li>• Laundry services</li> <li>• Linen rentals</li> </ul>	Small urban setting; single location	\$825,000
5	Suite of businesses operated by parent disability social service organization. Director of social enterprise and employment oversees businesses, each with its own cost centre	<ul style="list-style-type: none"> <li>• Airport cart retrieval</li> <li>• Bottle depot</li> <li>• Bottle pick up service</li> <li>• Paper recycling</li> </ul>	Large urban setting; multiple locations	\$1,587,000

*\* Drawn from annual reports for 2014-15*

studied here operated under three distinct structures: agency-owned and operated; cooperative; and not-for-profit corporation. Most operated a number of distinct businesses.

In addition to their legal business structures, some had also been granted charitable status. To be eligible for charitable status a WISE must have activities that further a charitable purpose, specifically implementing activities that relieve unemployment and other social and economic conditions associated with disability. In the case of co-operatives, there is a requirement that the worker “partners” will be involved in management or decision-making.

### Emergence from the Legacy of the Past

WISEs for people with IDD face the unique challenge of distancing themselves from sheltered employment, particularly if sheltered workshops were operated by the particular agency in the past. A range of business strategies were identified as countering the spurious association with sheltered workshops. These included: producing high quality, desirable goods or services that meet a recognized or potential market need, and thus are valued in the community; presenting a positive public image of people with IDD and their work roles; creating integrated work structures, where workers with and without IDD work side-by-side; providing opportunities for interactions between workers with IDD and the general public; and finally, paying wages at minimum wage or industry standards.

Where WISEs had emerged from former sheltered workshops, re-creating the enterprise to be seen as market-based, real employment required creating alternative options for legacy workers with IDD who were not interested in or able to work to business expectations. Such shifts could result in unresolved tensions for WISE developers, particularly when large numbers of former workers needed to be re-deployed. For example, when former sheltered workshop workers moved to day programs, many were left with diminished income, empty days and lack of productive engagement. Such situations presented a crisis point, challenging the underlying mission of enhancing the productive lives and incomes of people with IDD.

### Worker Support Models

The WISEs in this study demonstrated a number of approaches to providing worker support, and various means of dealing with the costs associated with that support. Overall, four general support strategies were identified:

**Trained agency staff provide worker support on a daily, ongoing basis.** This approach is based on the assumption that specialized training and expertise in rehabilitation strategies can best address the behavioural and support needs of workers with IDD.

**Business/trade specialists provide daily worker support.** In this model, trade specialists (e.g., skilled cooks, carpenters, landscapers) supervise workers. In all instances, these were individuals who lacked social service training, but were keenly sensitive to individual needs and how to nurture capacity while holding workers to expected standards of the trade or business.

**Natural supports combined with support of trained agency staff.** This involved support by co-workers, normally those without disability. In one of the WISEs, trained agency staff assisted with worker development and support; however, a portion of the workforce did not have a disability, and worked alongside those with IDD. These non-disabled workers saw themselves as providing collegial guidance and encouragement to the co-worker with IDD, but not responsible for their supervision.

**Natural supports combined with limited job coaching.** In this approach, workers without disabilities in an integrated workforce provided support to workers with IDD as needed, but without regular involvement of support professionals. Parent agency job coaches, who provide supports across all their employment programs, stay in touch with the workers and provide follow along supports, typically intervening where a worker is struggling, needs to learn a new skill, or desires to move into a community setting.

Trained support worker/job coach salaries were covered by the parent agency staffing budget in most cases but there was a movement in some settings to cover at least part through business revenues. When business or trade specialists

provided the worker oversight their salaries were covered by business revenues. In all instances where coworkers without disabilities provided natural supports, those wages were covered by business revenues.

### Compensation Structures and Strategies

The compensation approach was typically driven by agency philosophy, the incorporation structure, and the productive capacity of the workers. Overall, the enterprises sought fair and equitable means of compensating individuals and to provide some level of choice to workers and their families. Several different compensation approaches were observed, and often several were used within a single organization. The means of compensation included minimum wage, market-based wages, contractual pay, profit share, work incentive pay, piece rates, and training stipends (see Table 2). Managers expressed concerns, however, most

arising at the intersection between business philosophy and mission, and the need for an enterprise to be financially sustainable. Overall, the wage issue was the most volatile one emerging in agency discussions, but pay rates were not a major focus for workers themselves.

### Worker Engagement

While three WISEs actively engaged families in decision making and other mission-supporting work, two also developed structures to systematically and directly engage worker voice through the creation of a worker advisory committee. Sample contributions of committee members included discussing health and safety initiatives, developing surveys on key issues, and weighing in on the philosophy and goals of the organization. The cooperative WISE provided the most fully-developed structure for worker participation, and by definition this incorporation model depends on the collective involvement of workers in work decisions and

Table 2. Compensation Strategies

Method	Business(es)	Description/Example	Tensions
Minimum wage	2, 3, 4, 5	Entry level wage matches provincial minimum wage; rate increases with experience.	Requirement that all workers be paid at least minimum wage rate typically excludes those who are not sufficiently productive to merit this pay; tension between desire of business to be inclusive and engage many and need for business to be sustainable.
Market-based wage	5	Wages are competitive or close to competitive for the nature of the work. May exceed minimum wage.	As with minimum wage.
Worker contract	2	Worker agrees to perform certain work for a set compensation. For example, a farm worker may be contracted to clean animal stalls and feed livestock bi-weekly for an agreed weekly rate.	Some workers respond well to this arrangement, which allows them to work without deadlines and to target task completion rather than timeliness. If the weekly pay, when calculated as an hourly rate, averages below minimum wage, the business may be seen as violating minimum wage laws.

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Table 2. *Compensation Strategies* (continued)

<i>Method</i>	<i>Business(es)</i>	<i>Description/Example</i>	<i>Tensions</i>
Profit share	1	Available only within registered co-operatives, profits realized over and above operating expenses are shared proportionally by member workers based on the number of hours each works during the month in question. Compensation in this instance was calculated as a portion of monthly sales (e.g., 33% of sales were divided by workers) with the percentage reviewed regularly.	This model generates a group work ethic wherein all are responsible for the success (and pay rates) of the business. Members determine who should be admitted to the business, and who will be hired as support workers. In the case observed here, wages were typically lower than minimum wage; however, workers have increased control over their work situation.
Work incentive	4	Workers receiving provincial benefits (e.g., ODSP) are paid an hourly "incentive" for work that supplements the benefits received.	Most workers in the instances where this was observed reported being satisfied with receiving a small regular cheque on top of their disability benefits; in fact, some had limited awareness of what they were being paid. While a low pay rate allows a business to employ more workers, the practice diminishes the view of the work as "real employment" and places the business in violation of provincial law.
Training Wage or Stipend	3, 4	Similar to a work incentive, workers receive a below-minimum wage hourly rate while in a training phase.	This rate is justified as serving to reward workers who are not competitive in terms of vocational skills or productivity. This payment arrangement is considered defensible when it is time limited and associated with skill development, and where the pay rate increases as skills advance.
Piece rate	2	Workers are paid for the number of products completed, such as items packed or furniture items produced.	Rewards stronger workers who produce well, and is based on the notion of fair or proportional reward based on capacity. This practice was observed only in a few businesses that employed less productive workers who were committed to holding a job. Perceived by most as sheltered work.

processes. In this setting, workers with IDD were part of decision making for hiring, product development, work routines and policies. Some workers were also recognized as leaders and were supported in developing entrepreneurial skills.

### Advancing Inclusion

Social inclusion for workers was a central goal for all participating WISEs, and three primary means of achieving inclusion of workers were identified. In the first approach, the workforce consisted of a mix of workers with IDD and other workers with or without disabilities. At one WISE it was noted that there was no distinction in the business between the workers with IDD and others, and that co-worker and public perceptions of people with disabilities have been enhanced:

It has been great. Everyone accepts - everyone likes these guys big time. But they can see how hard they work, how much dedication they put into it.

In the second approach (sometimes seen in combination with the first), inclusion was achieved by having contact with the public in the natural course of the work. This contact was realized in the context of work activities such as serving the public in a retail sales context, doing landscaping, recycling pick-ups or other tasks in community spaces, or simply traveling on public transit as part of the job.

In the third approach enhanced social participation occurred in workers due to their increased incomes, and their heightened level of social confidence built on the job. For example, workers, when talking about how they used their income spoke of shopping, attending movies, going out for coffee with friends, participating in public events, and saving up for special things like travel.

In addition, the WISEs prided themselves on the impact the business as a whole made on the local community, such that the work of the WISE broke down stereotypes, built sustainable relationships between the company and the community, addressed social and economic gaps in the local community and built goodwill towards the IDD population by making them a positive force within the community.

### Career Progression

A range of options related to promoting worker access to a variety of jobs, work-related opportunities and career advancement were present across the case studies.

Most of the WISEs included a suite of business ventures. The creation of new business opportunities and new types of jobs was one important way to ensure that people with IDD can find work that is a match for their interests, strengths and needs, and was seen in WISEs that ran multiple businesses. In rural communities, it was also reported to be the only source of new job development in the region. Business creation required that WISE leaders were highly entrepreneurial and continuously attentive to local opportunities related to products and services. For example, one rural WISE identified an opportunity to integrate workers into existing farm operations in the region, and to serve as the employer for the workers in a brokerage type of relationship. Enterprises also found ways to create novel growth experiences for workers that could help build skills and enhance job satisfaction.

There were several examples of efforts to develop jobs with higher levels of responsibility, and titles and compensation to reflect this responsibility. These included a type of foreman position that had workers with IDD oversee attendance, holiday schedules and related work routines, and also the potential in one workplace for workers with IDD to move to general labourer positions reflecting a higher level of experience and work performance. One WISE created an opportunity for some of their workers to travel to France to visit social firms built around a similar model to their own. There was some pushback from families, however, when enterprises tried to move workers into higher level positions. In some instances families were reported to be uncomfortable with their family members earning higher pay rates which they believed would compromise the financial security of disability benefits. In one instance, where part of the workforce was unionized, family members had concerns about the risks of union membership.

Movement to jobs in the conventional workforce is supported within these WISEs, but



direct services to support this transition was typically seen as out of the scope of the WISE mandate. The WISEs did not routinely collect data related to movement to other mainstream work. Within these WISEs workers with IDD who were motivated to seek employment in the conventional workforce were typically connected to social agencies with job placement and support services. Each WISE provided examples of workers moving to mainstream jobs, and at least one indicated that some of their workers also hold part-time jobs in the broader community workforce.

It was noted that some attempts by workers to move to conventional jobs had not been successful. Issues related to the general lack of suitable employment and difficulties with transportation, particularly within rural areas, were also raised. There was evidence that the workers experience a high level of social belonging within the WISE and that families may push-back when they perceive that this social stability will be disrupted. Overall there were few explicit incentives for leaving the WISE to pursue community employment

### **WISE Connection With the Provincial Social Services Mandate**

The agencies that supported the WISEs studied here universally reported that by creating a WISE they were furthering their agency mission and satisfying the trust placed in them by the social services funding source. Social enterprise allowed them to expand their activities and serve more people than would be possible if operating only with provincial funding.

WISEs initially created and supported through provincial funding were sometimes able to secure outside loans to grow the enterprise. However, provincial funding was critical to all as a means of providing the salaries for key staff who provided direction and leadership and facilitated sustainability. Also critical was support from provincially funded small business development agencies, well-sourced boards of directors, input from university researchers and mentoring from existing WISEs.

All Ontario WISEs used provincial funding for at least one key staff person (e.g., manager or

director) or a portion of the workload of upper management agency staff (e.g., director of programming, chief financial officer, marketing and outreach manager) who supported the WISE in addition to their other responsibilities. A portion of support worker salaries was also paid through agency funds for job coaching, supervision, or movement to supported employment. All agencies had evolved their bookkeeping to delineate the resources used by the WISE, including staff and space, and to run separate balance sheets for their financial operations

There were challenges to working within the system, particularly in Ontario, where most of the WISEs existed in a space that lay between social agency and competitive business. Thus, the employer-employee relationship was complicated by the need to maintain individual support plans for workers, and to hire through the provincial program admission system. There were other scenarios, based on the form and history of incorporation, where the WISE businesses were seen as a separate entity operated at arm's length from a social service agency, and the persons with IDD were seen as workers only. This was clearly the case in Alberta, where the WISE could hire workers into any of their businesses using a varied recruitment system of agency referrals and community job postings, and an informal hiring system to maintain a desired mix of people with IDD and others.

## **Discussion**

In the IDD sector, the competitive employment market is becoming increasingly difficult to navigate, given the changing nature of job demands, the shift to non-permanent work, and increasing socio-economic demands on employers (Santilli et al., 2014). Yet work remains a primary context for skill development, socialization, and establishment of an adult identity and self esteem (Santilli et al., 2014). WISEs provide one option for meaningful work involvement and job preparation. This study provided the opportunity to unpack some of the successes, challenges and tensions associated with WISEs in the IDD sector. The emergent data provided a number of insights relative to our research questions, and suggested directions for further development.

### **What conceptual models/philosophies have guided WISE in the IDD sector?**

A core feature of the WISEs in this study was their belief in the value of and the right to work for people with IDD. Tensions arose when WISEs were forced to exclude some workers in an effort to operate like a business, with minimum expectations for worker performance. Such situations created major turning points for some WISEs, but helped them move towards a business orientation. WISEs also espoused the need to empower workers. Some focused on empowerment by building work skills and confidence, while others developed meaningful strategies to incorporate worker voice and valorization through their evaluative processes, boards and structured worker meetings.

In most of these cases, the WISE was seen as a stepping stone to community based supported employment, or a hybrid that created the conditions for successful work, and provided supports from within. In one case the WISE emerged from an initiative developed by a person with IDD and evolved as an entrepreneurial worker cooperative. While supported employment was endorsed by the WISEs, the model was not seen as feasible in rural communities where jobs are rare and need to be created, or for workers with exceptional challenges in meeting competitive standards.

### **What factors have contributed to promoting and defining WISE in the IDD sector? What policies and structures contribute to or detract from the establishment of WISEs?**

Provincial funding has been foundational to the success of all the WISEs studied. Flow-through funding supported salaries for managerial positions, support workers, and in some cases, worker stipends. The need to serve more constituents was a key driver behind implementation of these WISEs. Critical funds for equipment purchase or real estate acquisition derived from external foundations and loans were leveraged on the existing infrastructure and stability gained through the provincial funding support.

A central feature that dominates discussion in this arena is the approach to compensation.

Most of the WISEs studied had a commitment to paying workers at least minimum wage, aligned with principles of normalization (Wolfensberger, 2011) and the social value placed on the labour of those with IDD. This commitment comes with certain perils, as particularly in this sector, payment at minimum wage may threaten the very existence of the WISE, or the upholding of WISE goals of employing people who are the most marginalized and vulnerable. While this tension shaped the nature and direction of growth, and threatened some of the core visions of the businesses involved due to the need to move some workers out of employment streams, it also helped define the legitimacy of the businesses.

The nature of government disability benefit regulations and their role in shaping the nature of the WISE workforce also produces human resources challenges. Because many workers with disabilities and their families limit employment exposure in order to avoid disruptions to their disability income (Saunders & Nedelec, 2014), WISEs typically operate with a largely part-time workforce, and lack back-up to cover for worker absences. While the Ontario government and others have sought to remove barriers to work, it was clear in our findings that many participants and their families retained concerns about risk, and made choices that may not have supported optimal levels of work engagement. Further attention to this issue, in particular with respect to how it might uniquely manifest for people with IDD, is an important area of further study.

Finally, an ongoing tension that existed only in Ontario WISEs relates to complying with provincial social service requirements as a service provider while functioning in an employer-employee relationship with their workforce.

### **What factors have contributed to the success and survival of WISEs in this sector?**

Universally, the nature and growth of the WISEs was based in opportunism – with a visionary leader or grassroots manager seeing an opportunity to serve a market niche or to purchase or bid on a local business or real estate opportunity. Tolerance for risk was a core feature of some of the larger WISEs. The cases

studied revealed the importance of WISEs nurturing local resources, connections and community support as they considered possible ventures and went through the challenges of creating and growing their businesses. In Alberta, the provincial decision to assign bottle return/recycling facilities to community agencies as a revenue source is a major support to the WISE, while in Ontario the local business case for a recycling firm led to municipal support for a WISE venture. Overall, government policy appeared to have a major role in decisions made by WISEs, and the direction of their growth, development, and in some cases, failure.

For a WISE to succeed, a sustainable business plan and sound operational procedures are essential (Cooney et al., 2016; Kidd & McKenzie, 2014). All WISEs in this study noted the importance of securing business advice. The presence of skilled trades people as supervisors in some businesses both enhanced the quality and marketability of the product or service being delivered, and contributed to the perception of the positions as real work.

### **What strategies promote choice, independence and social inclusion for workers? What does social inclusion look like in these varied contexts?**

There are a number of ways that people can achieve inclusion that relate to the employment context itself, including doing work that fits one's goals and preferences, feeling competence in the work role, and having the sense that one is contributing to a greater good (Lysaght & Cobigo, 2014). There are also explicit strategies demonstrated through this study that represent different forms of inclusion through WISE, such as creating an integrated workforce, structuring the work so as to ensure community contact, and building a socially desirable product or service that feeds the sense of pride and contribution in workers. A taxonomy of social participation that has been advanced by Levasseur, Richard, Gauvin, and Raymond (2010) proposes a continuum by which inclusion strategies might be interpreted, progressing from doing activities that prepare one for being with others, to presence in a community without direct interaction, and ultimately to

shared experience, collaboration and contribution. The strategies to encourage social inclusion for workers that were employed by the firms in this study spanned the full continuum described in this model, often including more than one approach.

## **Conclusions and Recommendations**

Based on the findings of this study, the following findings are of note:

- WISEs can serve as a valuable means for IDD agencies to support their missions. By leveraging the agency resources (equipment, expertise) supported through provincial funding, agencies are creating WISEs to provide opportunities for greater numbers of citizens with IDD, while advancing the social inclusion mandate beyond what would be possible if entrepreneurial strategies were not used.
- Guidance and support are needed to assist organizations who wish to undertake this approach to employment. This may be in the form of seed funding, legal counsel, assistance in making important choices about business models, ongoing business advice, and guidance as to how transfer funds can legally and reasonably be used. The sector should consider how to grow this knowledge base if WISEs are to be encouraged as a viable option.
- While guidelines and standards are important to ensure that WISEs satisfy best practices, it is important that they have opportunity for innovation, creativity and flexibility so that new business ventures respond to the local environment and specific missions and policies that govern WISE development.
- Evidence suggests the need for a *business orientation* rather than a *service orientation* in the way WISEs operate. Strategies for providing support while allowing WISEs to make sound business decisions, take risks, and do independent worker recruitment are vital.
- Finally, it is critical that ongoing evaluation of the varying business models and approaches to compensation be studied, along with stud-

ies of worker outcomes. This evidence base is necessary to build support for WISE, and to guide ongoing development such that WISEs effectively promote engagement and social inclusion for adults with IDD.

## Key Messages From This Article

**People with disabilities.** Working in a social enterprise can be a good choice for many people with disabilities. In choosing to work in a social enterprise, it is important to find a good match for your skills and interests, fair working conditions, the amount of support you need, and plenty of opportunity for continued career growth.

**Professionals.** WISE success requires incorporation of sound business principles, willingness to take on some level of risk, and use of a business (rather than social service) orientation

**Policymakers.** WISEs are a potentially valuable strategy for helping agencies move more people into employment. Evidence shows that use of explicit strategies can build social inclusion through WISE.

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