



Director's REPORT

to the
Management
Advisory
Board

Lou Hammond Ketilson, Director
Centre for the Study of Co-operatives

March 2009



The Centre for the Study of Co-operatives is an interdisciplinary teaching and research institution located on the University of Saskatchewan campus in Saskatoon. Contract partners in the co-operative sector include Credit Union Central of Saskatchewan, Federated Co-operatives Ltd., Concentra Financial, and The Co-operators.

The centre is also supported by the Saskatchewan Ministry of Enterprise and Innovation and the University of Saskatchewan.

The university not only houses our offices but provides in-kind contributions from a number of departments and units — Bioresource Policy, Business, and Economics, Management and Marketing, and Sociology, among others — as well as financial assistance with operations and nonsalary expenditures.

We acknowledge with gratitude the ongoing support of all our sponsoring organizations.



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Overview and Highlights

▲ Successful Letter of Intent

We've just heard that the Letter of Intent to SSHRC's Community-University Research Alliance program for a project that proposes to measure the impact of co-operatives in Canada has been successful. Our partners in this project are CCA, St. Mary's University, Mount Saint Vincent University, and the BC Institute of Co-operative Studies, with John Anderson at CCA and Sonia Novkovic at SMU the principal investigators. The success of the LOI means the partnership will receive \$20,000 to develop the full application, work on which will begin almost immediately.

▲ Social Economy Project Update

There is not a great deal new to report on this large undertaking. Projects are humming along as expected, with two more final reports having been submitted and a number of others in their final stages.

Due to the retirement of Tom Carter and the departure of Anita Friesen from the Winnipeg Inner-City Research Alliance, we have secured a new partner for the Manitoba region, the Institute for Urban Studies at the University of Winnipeg, directed by Jino Distasio. Centre PhD candidate Monica Juarez Adler has replaced Anita. Monica has been involved with the project in Winnipeg for the past eighteen months, so the transition was a smooth one.

Plans are underway for another regional conference in February 2010; it is likely to take place in northern Ontario.

The exhibition of research results in preliminary planning with the Diefenbaker Canada Centre has been rescheduled for the late spring of 2010. After discussions with Diefenbaker Centre staff, it quickly became clear that the undertaking was far too complex for the brief timeline originally planned. Delaying the exhibition will allow time for many of the projects to be completed and thus give us a richer pool of results from which to draw. We have already established thematic areas and are currently working on an overall vision for the exhibition. Diefenbaker Centre staff have provided us with a variety of display units to consider and have prepared some preliminary mock-ups of display possibilities. It is proving to be a learning experience all round and we are enjoying the opportunity to work collaboratively with other units in the building.

▲ Other Research Update

- ▲ the history of the Saskatchewan Co-operative Youth Program undertaken in partnership with the Saskatchewan Co-operative Association; complete
- ▲ Lou and Kim’s project with Indian and Northern Affairs Canada examining the use of co-operative models to finance Aboriginal economic development; complete
- ▲ Lou and Kim’s project examining representation and governance issues for Advantage Credit Union in northeastern Saskatchewan; complete
- ▲ Lou has a new project funded through the centre’s Social Economy grant to conduct a gender analysis of the research being conducted within the Canadian Social Economy Research Partnerships
- ▲ Lou, Roger, and Dwayne’s project examining amalgamations and mergers in the retail co-op sector; ongoing
- ▲ Brett’s SSHRC project “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations”; ongoing
- ▲ Murray’s “Co-operative Structure, Corporate Governance, and the Failure of Agricultural Co-operatives”; ongoing
- ▲ Murray’s “Adapting to New Environments: Agriculture and Rural Economies in the 21st Century”; ongoing
- ▲ Murray’s “Co-ordination, Identity, and Success in a Federated Marketing System: Retail Co-operatives in Western Canada”; ongoing
- ▲ Michael’s work with a variety of partners on “Houses and Communities: Learning from a Case Study of Co-operative Assisted Home Ownership in Saskatchewan,” a study of the Quint housing co-ops; ongoing
- ▲ Michael also has a new research project — “Food Sovereignty in the Canadian Context: Issues, Initiatives, and Opportunities,” funded by Heifer International Canada

▲ A New Class

We’re very pleased about the development of a new class at the centre. Our post-doctoral fellow, Catherine Leviten-Reid, spent much of the fall developing the syllabus for an MA-level class titled *The Social Economy and Public Policy*, which she is teaching this term through the Johnson-Shoyama Graduate School of Public Policy. The class has afforded us another opportunity to work collaboratively with the new school, a situation we intend to continue cultivating.

▲ Conferences and Workshops

- ▲ Re-imagining Health Services: Innovations in Community Health, November 08, Vancouver: Catherine presented
- ▲ 11th annual Farmer Cooperatives Conference — Cooperative Strategy, Structure, and Finance — St. Paul, MN, 18–19 November 08; Murray presented
- ▲ NCERA–210 Annual Meeting — Co-operative Conversions, Failures, and Restructurings: Case Studies and Lessons Learned from US and Canadian Agriculture — 19–20 November 08, St. Paul, MN; Murray presented

- ▲ Mobilizing Resources for Action to Support Regional Co-op Councils in BC, Victoria, 8 January 09; Lou presented
- ▲ Knowledge Mobilization Works workshop, 22–23 January 09, Ottawa; Heather attended
- ▲ Project Management Workshop, 26–28 January 09, Saskatoon; Roger and Heather attended
- ▲ CCA-sponsored 2009 Institute of Co-operative Studies, 1–3 February 09, Banff; Lou facilitated and presented; Roger presented
- ▲ FCL's annual meetings, 2–3 March 09, Saskatoon; Roger and Lou attended

▲ Publications

- ▲ *The Social Economy in Quebec: Lessons and Challenges for Internationalizing Co-operation*, centre booklet by Marguerite Mendell — published
- ▲ *Co-operative Youth Education in Saskatchewan: Co-op Schools and the Saskatchewan Co-operative Youth Program*, published
- ▲ two more final reports from the Social Economy project delivered; one edited and with author for queries; the other in editing
- ▲ *The Agriculture of the Middle Initiative, Pre-Mobilizing Considerations, and Formal Co-operative Structure*, occasional paper by Thomas Gray, a rural sociologist with the United States Department of Agriculture — editing complete, with author for queries
- ▲ *A Co-operative Dilemma: Converting Organizational Form*, by Roger and Jorge Sousa — centre book, in revision, majority of editing complete
- ▲ *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, centre book based on Social Cohesion research edited by Brett and Nora — Nora in process of preparing edited chapters to send to authors for requested changes
- ▲ plus reprints of seven titles

▲ Faculty/Staff/Student News

- ▲ Kim Brown, a former MA student at the centre, who has worked on a number of research contracts and Social Economy related projects, has left the centre for a position in Regina as a case assessment officer for the Indian Residential Schools Adjudication Secretariat; Kim has been with us for several years and we will miss her, but wish her luck as she begins her career
- ▲ Dwayne Pattison, another of our former MA students, has a new contract with CCA, CCCM, and the Co-operatives Secretariat to work on a comprehensive survey of co-operative research priorities; he continues to work on his amalgamations project
- ▲ visiting scholar Jessica Gordon Nembhard spent more time at the centre during December and January and will be returning in March; she is currently a visiting assistant professor in the Economics Department's Center for Race and Wealth at Howard University in Washington, DC
- ▲ Marie Bouchard, Canada Research Chair in the Social Economy, and a profes-

sor in the Department of Organization and Human Resources, School of Management, University of Quebec at Montreal, joined us for three weeks in January as a visiting scholar; she is working with Brett and Murray on Brett's SSHRC project, "Cognition and Governance in the Social Economy"

- ▲ Kama Soles received the Fredeen Scholarship for 2009; she also received a scholarship under Brett's "Cognition and Governance" project
- ▲ and we have a new co-op baby! Michael Chartier, one of our grad students, and his wife, Cynthia Moreno Calvillo, are thrilled to announce the arrival of Oscar Henri on 1 March 2009

▲ The Seminar Series

- ▲ "Outcomes and Organizational Form in the Child Care Sector: How Do Co-operatives Compare?" Catherine Leviten-Reid, 21 November 08
- ▲ "Adult Education and the Social Economy: Rethinking the Communitarian Pedagogy of Watson Thomson," the annual Fredeen Scholarship Seminar, Michael Chartier, 11 December 08
- ▲ "Social Innovation: What is it? Where is it? Why does it matter?" Marie Bouchard, 22 January 09
- ▲ "People before Profits: Enriching the Social Economy of Rural Saskatchewan," Jonathan Anuik and Heather Williamson, 26 February 09
- ▲ "Banking on the Difference: Credit Unions as Community Assets," Jessica Gordon Nembhard, 19 March 09

▲ Partners and Developments

This section highlights relevant issues and developments among centre sponsors.

SaskCentral (Karl Baumgardner reporting)

Financial (31 December 2008)

Net earnings were a loss of \$447 million, the worst financial results in the history of SaskCentral. The cause of the huge deficit is a provision of \$49.2 million for A.B.C. Paper (\$74 million for 07 and 08, representing 40 percent of holdings in A.B.C.P). Investee earnings were below budget by \$10.4 million. Assets increased \$45.3 million from plan to \$1.6 billion. A capital call was made to credit unions in December 2008, which raised \$12.4 million of membership capital.

Investees

SaskCentral provided Celero with an additional loan for \$5.3 million (Saskatchewan holds 31.4 percent of the shares). Credential Financial requested a \$7 million capital call.

Initiatives

The Centrals of Saskatchewan, Alberta, and Manitoba, as well as Concentra Financial, are developing a business strategy to create a Prairie Central. If credit unions approve, the merger is scheduled for 1 January 2011.

Delegates are lobbying MLA's for legislative changes to allow Saskatchewan credit unions to sell insurance within their branches and provide members with appropriate information.

Switching to "chip cards" is planned for 2010 and IFRS (International Financial Reporting Standards) is required for 2011.

The AGM is planned for 8 April in Regina, preceded by a conference 6-7 April.

The Co-operators (Karl Baumgardner reporting)

Financial (31 December 2008)

Pretax income was \$148.4 million (2007 was \$286.6 million). All operations were impacted by market turmoil. Costs of auto and storm claims were higher than anticipated. The Alberta courts rejection of a "soft-tissue" cap required a \$40 million provision. Capital ratios are well above OSFI (Office of the Superintendent of Financial Institutions) requirements. The board is proposing Price Waterhouse Coopers for external auditors to members at the AGM.

Growth

Annualized premiums were down for two-thirds of insurance companies but The Co-operators showed a gain.

Clients

Credit scoring will be used as a rating factor for homeowners' policies.

Services

Group critical insurance is now available. Information on health and dental plans will be available via online services.

Co-operatives

There are now forty-six members. The member loyalty distribution will be up to \$7.72 million.

Trust and Reputation

The sustainability program has been enhanced. The companies, staff, and agents contributed \$5 million to communities.

\$6.8 million in Community Economic Development funds have been allocated from 1995-2008.

Concentra Financial

Mary Becket will present a verbal report.

Federated Co-operatives Limited

Marilyn McKee will present a verbal report.

Teaching, Research, Publications, Presentations, Outreach and Engagement, and Administration

Lou Hammond Ketilson

▲ Graduate Supervision

Lou is co-supervisor for Rochelle Smith (PhD, Interdisciplinary Studies) and supervisor for Tselvelmaa Chuluunbaatar (MA, Interdisciplinary Studies). She is a committee member for Monica Juarez Adeler, an InterD PhD student, and Nicoleta Uzea and Wu Haotao, PhD students in Bioresource Policy, Business and Economics. She is committee chair for Kama Soles (InterD MA), as well as Rob Dobrohoczki, Zhao Jun, Patricia Elliot, and Mitch Diamantopoulos, all InterD PhD students.

▲ Research

- ▲ in partnership with the Canadian Women's CED Council, Lou is about to begin a research project funded through the centre's Social Economy grant to conduct a gender analysis of the research being conducted within the Canadian Social Economy Research Partnerships
- ▲ principal investigator for the centre's Social Economy project, "Linking, Learning, Leveraging," jointly undertaken by the centre and the Community-University Institute for Social Research in partnership with academics and community partners in Saskatchewan, Manitoba, and northern Ontario
- ▲ co-applicant in a letter of intent initiated by CCA for a SSHRC-funded CURA that proposes to examine the impact of co-operatives in Canada
- ▲ project with Kim Brown on using co-operative models to finance Aboriginal economic development is complete and with Indian and Northern Affairs Canada for comment
- ▲ project with Kim Brown examining governance issues at Advantage Credit Union; completed and with ACU's Governance Committee
- ▲ with Roger and Dwayne, she is a participant in the centre's research project examining mergers and amalgamation in the co-operative retail sector
- ▲ co-applicant in the Atlantic, Southern Ontario, and Northern Social Economy nodes; she is a co-investigator in a project titled "Integrating Social Economy Curriculum into Canada's Business Schools" with the Southern Ontario node; and a co-investigator with the Northern node in a project titled "The Role of Women in Social Economy Organizations in Canada's Far North"
- ▲ co-applicant in Murray's SSHRC-funded "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"

▲ Publications and Related Activities

- ▲ with Kimberly Brown, “Financing Aboriginal Enterprise Development: The Potential for Using Co-operative Models,” for Indian and Northern Affairs Canada
- ▲ with Kimberly Brown, “A Post-Merger Governance Review,” a study of the impact of amalgamation on the governance structure and effectiveness of Advantage Credit Union; the centre hopes to publish this
- ▲ “The Role of Co-operatives in Supporting Agriculture and Rural Development in Canada,” in *Farmers’ Co-operatives*, ed. Dr. Yuan Peng, Rural Development Institute, Chinese Academy of Social Sciences, Beijing; in progress
- ▲ with Gayle Broad, drafted a paper on “Mapping the Social Economy in Aboriginal Communities in Canada” for a book to be published by the Social Economy Research Partnership
- ▲ “First Nations Co-operatives in Canada: (Re)inventing Appropriate Forms of Enterprise,” chapter in forthcoming centre book *The Self-Help Solution: Co-operative Renewal in Canadian Communities*

▲ Presentations and Conferences Attended

- ▲ “Perspectives from the Academy: What We Have Learned about the Social Economy in Canada,” presented to the Government Dialogue and Research Showcase, Ottawa, 25 November
- ▲ “Financing Aboriginal Economic Development in Canada: The Role of Co-operative Models,” presented to the University of Victoria Business School Seminar Series, Victoria, 8 January
- ▲ “Getting the Message Out: Successful Models for Co-operative Enterprise Development,” keynote address for the conference on Mobilizing Resources for Action to Support Regional Co-op Councils in BC, Victoria, 8 January
- ▲ provided wrap up and synthesis comments for above conference, 9 January
- ▲ “A Post-Merger Governance Review,” presented to the Governance Committee, Advantage Credit Union, Melfort, 20 January
- ▲ “Innovative Co-operatives in Canada,” presented to a seminar organized by the University of Wisconsin Center for Cooperatives, Madison, 29 January
- ▲ “Centre for the Study of Co-operatives: A Unique Learning Environment,” presented to the management board of the University of Wisconsin Center for Cooperatives, Madison, 30 January
- ▲ co-facilitator (with Françoise Morrisette) of entire conference and also a presenter (in the Strategic Planning and Member Engagement sessions) at the CCA-sponsored Institute for Co-operative Studies, Banff, 2–4 February; there were sixty-four participants from across Canada, the largest registration yet, and according to participants, it was the best institute yet
- ▲ with Roger, attended FCL’s AGM, 2–3 March, in Saskatoon

▲ Administration

Specific to the Centre

- ▲ commitment leader for the Issues-Based Interdisciplinary Scholarship priority of the U of S Second Integrated Plan 2008–12; numerous meetings with VP Research and members of commitment working group since early December
- ▲ board member, Saskatchewan Co-operative Association; participated in one board meeting
- ▲ member of steering committee for the September 2009 Youth Sustainability Conference hosted by The Co-operators in Guelph; also member of program design committee; have participated in monthly conference calls for both committees
- ▲ prepared for March management advisory board meeting
- ▲ reviewed applications to Co-op Concentration; chaired two student advisory committee meetings
- ▲ drafted centre funding proposal

Specific to the Social Economy Project

- ▲ participated in the monthly conference calls and meetings organized by the National Hub and other associated committees and adhoc groups
- ▲ chaired conference call meetings of LLL management board, December and February

As Chair of ICA Committee on Co-operative Research

- ▲ assisting with organization of the annual conference in Oxford, September 09
- ▲ member of the steering committee of the Research and Policy Programme at the Co-operative College, Manchester

Brett Fairbairn

Most of Brett's time is devoted to his administrative responsibilities as University Provost and VP Academic, though in a reduced capacity he remains connected to the centre and co-operative studies in a variety of roles.

▲ Graduate Supervision

Brett continues to supervise or co-supervise two PhD students:

- ▲ Mark McCulloch (History) "Women's Groups and Consumer Co-operatives in East Germany, 1949–71"
- ▲ Rochelle Smith (InterD) "The Relationship of Saskatchewan's Co-operative Community Clinics with the Government of Saskatchewan: Towards a New Understanding"

He is also on a number of other PhD and MA advisory committees.

▲ Research

- ▲ principal investigator, “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations,” SSHRC funded; co-investigators are Murray Fulton and Marie Bouchard of UQAM
- ▲ co-investigator, “Coordination, Identity, and Success in a Federated Marketing System: Retail Co-operatives in Western Canada,” SSHRC funded; principal investigator is Murray Fulton
- ▲ co-investigator, “Adapting to New Environments: Agriculture and Rural Economies in the 21st Century,” SSHRC funded; principal investigator is Murray Fulton
- ▲ co-investigator, “Strategic Research Network on Social Innovation, the Social Economy, and Civil Society,” SSHRC funded; principal investigator is Denis Harrisson of UQAM

▲ Publications

- ▲ “Economic and Social Developments,” in *Imperial Germany 1871–1918: The Short Oxford History of Germany*, ed. James Retallack. Oxford: Oxford University Press, published
- ▲ “Communications, Culture, and Co-operatives: Liminal Organizations in a Liminal Age,” in *Approaches to Co-operative Studies: A Selection of Papers and Presentations*, ed. Ian MacPherson (Victoria, BC: New Rochdale Press), published
- ▲ “‘Canada’s Co-operative Province’: Individualism and Mutualism in a Settler Society, 1905–2005,” in *Perspectives of Saskatchewan: 1905–2005*, ed. Jene Porter. Michigan State University Press, published
- ▲ *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, Brett is author or co-author of four chapters; he reviewed Nora’s detailed editorial comments; ms is with Nora in preparation for distribution to authors
- ▲ with Rob Dobrohoczki, “Credit Unions and the Construction of Locality: The Case of South Interlake Credit Union, Canada,” article submitted to *Journal of Co-operative Studies*, UK
- ▲ “A Shift in Values: Credit Union Expansion by Conversion of Bank Branches,” in *A Co-operative Dilemma: Converting Organizational Form*, ed. Roger Herman and Jorge Sousa, forthcoming centre book
- ▲ review of Robert Arsenschek, *Der Kampf um die Wahlfreiheit im Kaiserreich: Zur parlamentarischen Wahlprüfung und politischen Realität der Reichstagswahlen 1871–1914* (Düsseldorf: Droste, 2003), *German History*, forthcoming
- ▲ review of Uwe Puschner, *Die völkische Bewegung im wilhelminischen Kaiserreich: Sprache, Rasse, Religion* (Darmstadt: Wissenschaftliche Buchgesellschaft, 2001), *German Studies Review*, forthcoming

▲ Presentations

- ▲ with Richard Florizone, “Town Hall Meeting: Financial Management in an Uncertain Environment,” 24 February 09, Saskatoon

- ▲ “Whom Do We Serve? Locating the Public Interest in the University of Saskatchewan,” the provost’s academic address, 27 February 09, Saskatoon

▲ Professional Practice

Brett is on the editorial board of the *Annals of Public and Cooperative Economics* and is a member of the steering committee for the Johnson-Shoyama Graduate School of Public Policy.

Murray Fulton

Murray is on sabbatical this year, spending most of his time on research projects.

▲ Teaching

Murray gave a seminar at the University of California, Davis, in November based on the paper accepted for publication with the *Southern Economics Journal*, noted below under Publications

▲ Graduate Supervision

Murray is supervising five MA and PhD students working on co-operative topics and is a committee member for a number of others. His PhD student Lampros Laprinakis is working on three papers with co-op content: one on the impact of Saputo’s acquisition of Dairyworld; another on the role of cognitive dissonance in determining member commitment to co-operatives; and a third on the impact of decision framing on the strategic decisions taken by co-operatives.

▲ Research

- ▲ principal investigator, SSHRC-funded Knowledge Impact in Society (KIS) project, “Adapting to New Environments: Agriculture and Rural Economies in the 21st Century”; Brett, Lou, and Michael are co-investigators
- ▲ principal investigator, “Co-ordination, Identity, and Success in a Federated Marketing System: Retail Co-operatives in Western Canada,” SSHRC Standard Research Grant; Brett is a co-investigator
- ▲ principal investigator, “Co-operative Structure, Corporate Governance, and the Failure of Agricultural Co-operatives,” funded by SSHRC
- ▲ co-investigator, “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations”; SSHRC funded; Brett is principal investigator
- ▲ co-applicant in the centre’s SSHRC project on the Social Economy; academic co-lead of the Governance Cluster
- ▲ “Evaluation of Market Opportunities and Supply Chain Structure for Bio-control Products in Canada,” examining the role of co-operatives in providing co-ordination in this particular supply chain

- ▲ project examining the role of producer associations in innovation activity as part of the Canadian Agricultural Innovation Research Network
- ▲ “Transformative Change in Biosphere Greenhouse Gas Management,” SSHRC funded

▲ Publications

- ▲ with James Vercaemmen, “Optimal Two-Part Pricing in a Carbon Offset Market: A Comparison of Organizational Types,” accepted for publication at *Southern Economics Journal*

▲ Presentations

- ▲ “Saskatchewan Wheat Pool: 1996–2000,” at the 11th annual Farmer Cooperatives Conference titled Cooperative Strategy, Structure, and Finance, St. Paul, MN, 18–19 November 08
- ▲ another paper on Saskatchewan Wheat Pool at the NCERA–210 Annual Meeting titled Co-operative Conversions, Failures and Restructurings: Case Studies and Lessons Learned from US and Canadian Agriculture, 19–20 November 08, St. Paul, MN

▲ Administration

- ▲ graduate chair, Johnson-Shoyama Graduate School of Public Policy
- ▲ member of the Interdisciplinary Committee of the College of Graduate Studies and Research

Michael Gertler

▲ Teaching

Sociology 206.3: The Community
 InterD 898.3: Organizations, Communities, and Social Change (co-instructed with Centre Scholar Isobel Findlay and others)

▲ Graduate Supervision

Michael has on-going supervisory duties for two MA students (sociology); he is also on advisory committees for two InterD MA students (co-operative studies) and five InterD PhD students (four in co-operative studies, one in sociology).

▲ Research

- ▲ Michael has new research underway; he is the PI for a project titled “Food Sovereignty in the Canadian Context: Issues, Initiatives and Opportunities,” funded by Heifer International Canada

- ▲ co-applicant on the centre's SSHRC project on the Social Economy and a collaborator on the National Hub being run by the BC Institute for Co-operative Studies
 - ▲ co-applicant in Murray's SSHRC-funded "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"
 - ▲ applicant, Saskatchewan Housing Research Program grant, "Houses and Communities: Learning from a Case Study of Co-operative Assisted Home Ownership in Saskatchewan," a study of the Quint housing co-ops
 - ▲ collaborator (representing the Community-University Institute for Social Research), SSHRC CURA Letter of Intent for a project titled "Strengthening Community-University Partnerships to Provide Evidence for Policy Development and Community Change"; Bud Hall (UVic) is the applicant
 - ▲ co-applicant, SSHRC Standard Grant Application for project titled "La pertinence, les particularités, la légitimité et la performance des coopératives et des mutuelles à partir de leur identité"; Michel Lafleur (IRECUS) is the applicant
- ▲ Presentations
- ▲ "Las cooperativas y los desafíos del desarrollo sostenible" (Co-operatives and the challenges of sustainable development), December, Universidad de La Laguna, Spain
 - ▲ "Co-operatives and Co-operative Studies in Canada," December, Universidad de La Laguna, Spain
- ▲ Administration/Professional/Outreach and Engagement
- ▲ acting university co-director (term ended 31 December 08) and management board member, Community-University Institute for Social Research, U of S
 - ▲ member, College of Graduate Studies and Research Interdisciplinary Committee, 2008–11
 - ▲ member, Regional and Urban Planning Administrative Committee, College of Arts and Sciences
 - ▲ member, College of Arts and Sciences Employment Equity Committee
 - ▲ member, editorial board, *Journal of Cooperatives*, January 07–
 - ▲ member, editorial board, Rural Studies Series, Rural Sociological Society and Penn State University Press, July 2008_11
 - ▲ member, Rural Sociological Society Membership Committee, 2007 to present

Catherine Leviten-Reid

- ▲ Teaching
- ▲ an MA-level class on the Social Economy and Public Policy for the Johnson-Shoyama Graduate School of Public Policy; Catherine also developed the syllabus for this course

▲ Research

- ▲ Catherine's occasional paper "Co-operatives, Child Care, and Quality" is with Nora for editing
- ▲ she is drafting a paper titled "Co-operatives Delivering Care Services: An Essay on Outcomes"

▲ Publications

- ▲ with Brenda Parker and Kristen Springer, "Making Space for Graduate Student Parents: Practice and Politics," *Journal of Family Issues*, accepted for publication
- ▲ "Consumer Involvement in the Delivery of Social Care: Testing Co-production and Stakeholder Theory in the Child Care Sector," submitted to the *Nonprofit and Voluntary Sector Quarterly*
- ▲ finished revisions and resubmitted a paper on home care co-operatives to the *Canadian Journal on Aging*.
- ▲ working on the conference proceedings for the centre-sponsored conference Health Co-operatives: National and International Perspectives

▲ Presentations

- ▲ "Home Support Services, User Participation and Quality of Care," to conference titled Re-imagining Health Services: Innovations in Community Health, November, Vancouver

▲ Outreach

- ▲ serves on the board of the Saskatoon Community Clinic
- ▲ president of the board of the Canadian Association for Studies in Co-operation; duties include adjudicator for the CASC awards, chairing board meetings, program chair for the 2009 conference; reviewing conference abstracts, fundraising, assisting with production of the CASC newsletter, and communicating with members

Nora Russell

▲ Large Projects This Quarter

- ▲ the centre's annual report
- ▲ a centre newsletter
- ▲ a special members' newsletter
- ▲ copy editing and layout for another final report from the Social Economy project — the Manitoba Policy Framework (working title); with author for queries
- ▲ many revisions to the cover for *Co-operative Youth Education in Saskatchewan*:

Co-op Schools and the Saskatchewan Co-operative Youth Program; preparation of final text and cover files for printer; print supervision

- ▲ compiled list of all co-op research projects done at the centre for the past five years for Dwayne Pattison's national co-op research survey
- ▲ a new project preparing pdf files of all centre publications for posting to the website; this is ongoing
- ▲ co-ordination, writing, and layout for this director's report

▲ Other Activities

- ▲ prepared final files for printing and print supervision for Marguerite Mendell's booklet *The Social Economy in Quebec: Lessons and Challenges for Internationalizing Co-operation*
- ▲ prepared detailed editorial schedule for Roger and Jorge's Co-op Conversions book
- ▲ wrote article on *Co-operative Youth Education in Saskatchewan* history book for the fall CASC newsletter
- ▲ formatted English and French versions of CASC fall newsletter
- ▲ prepared articles on the Health Care Conference and on Bill Turner's Global Co-operator award for the CASC spring newsletter
- ▲ formatted English and French versions of CASC spring newsletter
- ▲ design and layout for Kim and Lou's report to Advantage Credit Union
- ▲ prepared seminar ads
- ▲ photo research for CCA's history book
- ▲ designed interlibrary loan slips for the library
- ▲ editing the minutes of the last advisory board meeting

▲ Reprints

- ▲ Accountability Report to both the sector and government
- ▲ *Co-operatives in Principle and Practice*
- ▲ *Adult Educators in Co-operative Development*
- ▲ *Encouraging Democracy in Consumer and Producer Co-operatives*
- ▲ *Interdisciplinarity and the Transformation of the University*
- ▲ *The Social Economy in Quebec: Lessons and Challenges for Internationalizing Co-operation*

▲ Professional, Outreach, and Other

Nora is on the executive of the Saskatoon branch of the Editors' Association of Canada. She is also a member of the Saskatchewan Publishers Group, which connects the centre to other publishing organizations throughout the province, and she is the centre's representative to the Saskatoon Co-op Network.

Roger Herman

Roger continues to work on the post-conference details following the 2007 Co-operative Innovation: Influencing the Social Economy event, including disseminating the presentations on the conference website and other publications.

He is part of the Finance Cluster of the Social Economy project and is a regular participant in the Social Economy project management advisory board meetings.

His book with Jorge Sousa (University of Alberta), *A Co-operative Dilemma: Converting Organizational Form*, undertaken on contract with the Co-operatives Secretariat, is undergoing final revisions prior to design, layout, proofreading, and publication.

He is working with Catherine Leviten-Reid preparing the proceedings of the centre-sponsored October conference on the role of co-operatives in the delivery of health care.

Roger has been involved in many other activities this past quarter.

- ▲ many conference call meetings in connection with his role as president of the Association of Cooperative Educators
- ▲ he represented the centre at the Snow Dome Classic fundraiser for the Co-operative Development Foundation in Saskatoon in December
- ▲ he is part of a participant selection committee for a national youth conference being organized by The Co-operators that will take place in Guelph in September 2009
- ▲ with Lou and Dwayne, he is helping to plan and co-ordinate the centre's research project examining mergers and amalgamation in the co-operative retail sector; he presented research findings at the CCA Institute of Co-operative Studies in Banff in February
- ▲ with Lou, he attended the annual general meeting of Federated Co-operatives Ltd., 2–3 March in Saskatoon
- ▲ he is working with Lou, Nora, and Heather on preliminary planning for the Exhibition of Research Results from the Social Economy project, jointly co-ordinated with the Diefenbaker Canada Centre
- ▲ with Heather, he participated in a three-day Project Management course in Saskatoon in January; the training will help them to manage the various projects undertaken by the centre
- ▲ with Lou, he is working on the final preparation of a toolkit for the development of First Nations Co-operatives; this is the end product of an earlier project with the First Nations Agricultural Council of Saskatchewan
- ▲ he continues to respond to inquiries regarding New Generation Co-operatives as well as co-ops in general
- ▲ he is responsible for co-ordinating the activities of visitors to the centre; he manages the centre's seminar series; and is the liaison with the centre's graduate students

Roger is an alternate centre representative at the University of Saskatchewan Centre's Forum; the meetings are intended to explore common issues and to ensure that the respective centres' concerns are heard. He is also an alternate centre representative to the Saskatchewan Co-operative Association.

Heather Acton

▲ The Library

- ▲ materials signed out: 120
- ▲ materials returned: 116
- ▲ reference and research requests responded to: 78
- ▲ books catalogued: 12
- ▲ new borrowers registered: 13

We are in the midst of a library renovation that will result in more shelving for what has been a very crowded space. This will improve access to library materials and allow for more space for students to work in the library. We will also gain a publications room and secure storage for sensitive materials as well as space for a proper archive for historical Centre materials. Heather, too, will have a more suitable working space. The renovations will result in a lot of moving and shifting of books and journals, but will also provide an excellent opportunity to thoroughly review and refine the collection.

▲ The Websites

With Duy's assistance, we have set up a system that allows us to capture statistics relating to the usage of our LLL website, which has been extremely eye-opening and encouraging. It has been a pleasant surprise to discover that people from all over the world have been looking at information on our site and downloading reports. This has solidified our thinking that good website statistics are very important. Duy is in the process of installing a much more sophisticated website analytics tool to help us track users with even more precision. This will be useful in helping us post information in a manner that will attract the most viewers. We will use this tool with the new centre website as well. One of the goals is to send emails to authors of reports available on our website letting them know how many times their materials have been viewed and/or downloaded and, possibly, where those users are from.

The planned January launch of the centre's new website encountered some unavoidable delays; we are now aiming for sometime in the spring.

▲ Heather Begins to Twitter

In January, Heather attended the first Knowledge Mobilization Works Boot Camp in Ottawa and came away with some excellent contacts as well as some

useful information for getting the word out about the work being done both at the centre and through the Social Economy project.

With the idea of knowledge mobilization on the brain, last week she started “Twittering.” Twitter is a micro-blogging / networking tool and the fastest growing social networking system on the web. Within a week she had seventy-eight people following her “tweets.” As a test, she tweeted a link to a report on our LLL website (Financing the Social Economy) and within a few hours her web statistics indicated that eighteen people had followed her tweet to that report. She then tried tweeting a few other links with varying degrees of success. All in all, the experiment has proved encouraging and she will continue to tweet about our Social Economy project and co-operatives and monitor the success of Twitter as a knowledge mobilization tool. Anyone interested in learning more about the potential of Twitter for mobilizing information should contact Heather, and if you have information you would like her to tweet about, let her know. Her current followers are from the United States, the United Kingdom, and Canada.

▲ Research Activity

With Roger, Heather prepared and submitted two USTEP applications with the hope of receiving funding for some summer students to work on preparations for the planned exhibit of Social Economy research. We will find out in March if we’ve been successful.

▲ Events Attended

- ▲ 15–16 January 09 — joined Lou for meetings in Winnipeg with Arctic Co-operatives and various members of the Social Economy Project
- ▲ 23 January 09 — Knowledge Mobilization Works Boot Camp in Ottawa
- ▲ 26–28 January 09 — Project Management Course in Saskatoon
- ▲ meetings of the Saskatoon Special Libraries Network and the University Librarians
- ▲ meetings (both conference calls and in-person) with the Social Economy Hub, the LLL Management Board, CUISR, and the Exhibit Committee

Heather continues to regularly update and maintain both the Centre’s blog and the LLL website and blog, and monitors topical websites and blogs of interest to faculty and staff.

Patty Scheidl

As office manager, Patty is responsible for the centre’s day-to-day operations and undertakes many additional duties as they arise. Regular duties include:

- ▲ updating and recording the revenues/expenditures associated with the centre’s monthly financial statements

- ▲ maintaining the SSHRC project account and all other research accounts, including monitoring these accounts to ensure that the funds are expended in accordance to the specified requirements
- ▲ investigating errors and processing journal vouchers for incorrect charges to particular accounts
- ▲ ensuring that all the supporting documentation is in the files
- ▲ updating the externally-funded research report provided at each board meeting
- ▲ helping Karen with publication purchases
- ▲ processing the transactions on the university credit card and ensuring that expenses are charged to the appropriate account
- ▲ processing all other invoices and cheques that come into the centre

Special financial responsibilities this quarter included:

- ▲ calculating dues and issuing invoices for each of our sponsor organizations; this also involved processing journal vouchers for each sponsor's funds, a new procedure implemented by the Financial Reporting office; completing the cash report forms and making deposits upon receipt of the dues
- ▲ processing cheque requisitions to transfer funds to the University of Regina and the University of Quebec at Montreal for the Social Economy project
- ▲ preparing payroll forms associated with Tsegi Chuluunbaatar's application for a leave of absence from the MA program due to health reasons
- ▲ processing many journal vouchers connected with Lou and Kim Brown's contract with Indian and Northern Affairs to move the expenditures out of the centre's operating fund and into the new project fund; this involved a review of eighteen months of expenditures
- ▲ finalizing the expenses for the Advantage Credit Union project

On an ongoing basis, Patty is responsible for organizing the Management Advisory Board meetings. This includes the many hours that go into co-ordinating a suitable date, preparing the minutes and other materials, assembling the board packages and couriering them out ahead of time, getting parking passes, booking rooms, and ordering lunch.

Other responsibilities this quarter include:

- ▲ editing and preparing the November 08 management advisory board meeting minutes; obtaining agenda items for the next meeting
- ▲ determining 2009 board meeting dates of each sponsor in preparation for contract renewal talks; establishing timelines for the submission of materials; ensuring that materials were emailed to the appropriate contact person(s)
- ▲ preparing the paperwork and payroll forms required to extend Catherine Leviten-Reid's postdoc position at the centre until 30 June 09
- ▲ preparing the scholarship contract, payroll forms, and other paperwork for Kama Soles's scholarship with Brett's Social Economy project
- ▲ co-ordinating the ethics application for the Advantage Credit Union contract; preparing journal vouchers to deal with expenses charged to the new fund;

- ▲ preparing payroll forms for Kim Brown and submitting them monthly
- ▲ co-ordinating matters concerning the Fredeen Scholarship with the College of Graduate Studies for this year's recipient, Kama Soles
- ▲ attending a half-day session concerning an on-line questionnaire associated with the current review of the university's Internal Controls
- ▲ co-ordinating many arrangements with Facilities Management associated with the library renovations, including packing, removal, and storage of library materials, moving major workstations, and co-ordinating the activity of the various trades involved
- ▲ co-ordinating arrangements and paperwork to grant an extension to Morris Altman's research on the Social Economy project
- ▲ making arrangements with NCBA for the renewal and payment for the centre's .coop domain names
- ▲ co-ordinating and assigning carrel/locker space for our students in the new graduate student room in the School of Public Policy
- ▲ making arrangements for several meetings and conference calls for faculty and staff

Karen Neufeldt

Karen's regular duties include:

- ▲ reception
- ▲ paperwork, including cash reports and filing
- ▲ xeroxing and printing
- ▲ invoicing and mailing publication orders; keeping track of stock for reprints
- ▲ invoicing telephone, fax, and xerox bills
- ▲ monitoring office supplies and ordering replacements as required
- ▲ mailouts as required
- ▲ updating the databases
- ▲ assisting with the preparation of packages for the advisory board meetings

Special activities this quarter include:

- ▲ transcribing the minutes of the November advisory board meeting
- ▲ co-ordinating the mailout of seminar series announcements for November, December, January, and February; in the case of the December event — the annual Fredeen Scholarship Seminar — also made arrangements for the room set-up, podium, and refreshments
- ▲ co-ordinating Tsegi Chuluunbaatar's committee meeting
- ▲ co-ordinating mailout of annual report
- ▲ co-ordinating mailout of special members newsletter
- ▲ co-ordinating mailout of centre newsletter
- ▲ making arrangements for Marie Bouchard's accommodations during her stay at the centre
- ▲ setting up conference calls — with the Fredeen family and Lou to discuss appli-

cations for the Fredeen Scholarship; several calls for CASC and the Social Economy project

- ▲ assisting with many travel, accommodation, car rental, and conference arrangements for centre personnel; processing travel claims upon return:

Lou and Heather to meet with Tom Carter, Wanda Wuttunee, Monica and Brendan in Winnipeg, 15–16 January

Heather to attend “Knowledge Mobilization Works” workshop in Ottawa, 22–23 January

Lou to participate in meetings and presentations at the BC Institute for Co-operative Studies in Victoria, 7–9 January

Lou to do presentations and have meetings with Brent Hueth at the University of Wisconsin Center for Cooperatives in Madison, 28–30 January

Lou and Roger to present at the CCA Institute of Co-operatives in Banff, 1–4 February

Lou for meetings with CCA, CCCM, and the Co-operatives Secretariat in Ottawa to discuss the co-op research priorities survey currently underway, 24–26 March

Karen also undertakes many incidental tasks for faculty, staff, and scholars.

The Students and Contract Researchers

Kim Brown has completed her project with Lou examining governance issues in the Advantage Credit Union system; it is with credit union officials for their comments. Kim continues to work part time on a CUISR internship writing a case study on La Ronge for the Social Economy project titled “Exploring the Social Economy in Saskatchewan.” In December she left the centre for a full-time position in Regina as a case assessment officer for the Indian Residential Schools Adjudication Secretariat.

Dwayne Pattison is writing the report on the impact of retail co-op mergers and amalgamations on such things as membership participation, governance models, management, and community. He is currently doing the qualitative data analysis of the interviews he conducted at the end of 2008.

Dwayne was recently hired by CCA, CCCM, and the Co-operatives Secretariat to assist with a survey on co-operative research priorities. He is co-ordinating a meeting to be held in Ottawa at the end of March to discuss the survey in more detail and to establish a national research agenda on co-operatives. He and his Francophone counterpart are responsible for writing a report on the process and its outcomes, which will be made available some time in the summer of 2009.

Monica Juarez Adeler is working on her dissertation proposal. She is currently working in Winnipeg on a contract associated with the Social Economy project

titled “Building a Tax Policy Framework to Enable Co-operative Development.” She has also taken over a co-ordinating role with our new Manitoba partner, the Institute of Urban Studies at the University of Winnipeg.

Rob Dobrohoczki is studying for his PhD comprehensives. He has one publication forthcoming, a chapter co-authored with Brett in the centre book *The Self-Help Solution: Co-operative Renewal in Canadian Communities*. This term he is teaching a course in co-operative law at the College of Law.

Zhao Jun continues to work on his PhD, though he intersperses these activities with other work. He recently reviewed the report “The Development of Farmers Organizations and the Small Farmers Adapting to Global Market Project,” a project he has been involved with for the past couple of years in China.

Rochelle Smith continues to work on revisions to her PhD dissertation titled “The Relationship of Saskatchewan’s Co-operative Community Clinics with the Government of Saskatchewan: Towards a New Understanding.”

Mitch Diamantopoulos is working on the research and writing for his PhD dissertation on the promise and potential of worker co-operatives in Canada. He has one publication forthcoming, a chapter titled “Belonging, Comfort, and Home: Globalization, Social Exclusion, and Innovations in Co-operative Housing” for the centre book *The Self-Help Solution: Co-operative Renewal in Canadian Communities*.

Mike Chartier continues to work on a CUISR internship for a Social Economy project titled “Advancing the Co-operative Sector: Mapping Development Needs of Co-ops in Emerging, Underrepresented, and Struggling Sectors.” He is working with the Saskatchewan Co-operative Association and Co-operative Ventures Worker Co-op. He also teaches grade eight at W.P. Bate Community School in Saskatoon and continues to work on his MA thesis on Watson Thomson, which he hopes to defend in the spring. As last year’s Fredeen Scholarship winner, Mike gave the annual Fredeen Scholarship Seminar in December with a presentation titled “Adult Education and the Social Economy: Rethinking the Communitarian Pedagogy of Watson Thomson.” Finally, Mike and his wife, Cynthia, had a baby on 1 March, a new little co-operator named Oscar Henri.

Kama Soles’ Interdisciplinary Studies Master’s thesis, “Empowerment through Cooperation: Disability Solidarity in the Social Economy,” is investigating the potential that the co-operative model has for empowering people with disabilities, and will identify barriers to inclusion in the social economy and the formation of co-operatives. She has completed her coursework and is currently working on her independent research. Kama was awarded the 2009 Fredeen Scholarship and has also received a scholarship under Brett’s “Cognition and Governance in the Social Economy” research project. Kama will be presenting “Leaders and Allies: The Role of Multistakeholder Co-operatives in Building an Inclusive Society” at the CASC conference in Ottawa this spring and plans to defend her thesis in the fall of 2009.

With Karlah Rudolph, she is also responsible for co-ordinating the Centre Seminar Series.

Tsegi Chuluunbaatar, who is at the course-work stage of her MA in the Co-op Concentration, has gone on medical leave, which we hope will be brief. Her thesis is tentatively titled “Increasing Opportunities for Women in Rural Mongolia through Co-operatives and Co-operative Models of Development.”

Karlah Rudolph is working with Murray and Brett on Brett’s SSHRC-funded project “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations.” She has completed one year of course work for her InterD MA; her thesis is titled “Co-operative Response to Globalization of the Food Chain: Implications for the Emergence of a Sustainable Food System.” Her work last summer compiling information on governance issues in social enterprises will be launched shortly on a website. She worked on a brief contract with Michael Gertler preparing a PowerPoint presentation on co-operative activity in Canada, which he presented at the University of La Laguna, Canary Islands, Spain, in December. Finally, Karlah works with Kama Soles co-ordinating the Centre Seminar Series.

Patricia Elliott, our newest InterD PhD student in the Co-op Concentration, is in her first year of course work. Her dissertation will study the social economy of community media, looking specifically at the impact of grassroots community radio across a broad range of social networks, points of tension, and ultimately, social change.