



# Director's REPORT

to the  
Management  
Advisory  
Board

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

November 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.



# Overview and Highlights



Contract Renewal



Social Economy Project Update



Other Research Update



Conferences and Workshops



Publications



Faculty/Staff/Student News



Partners and Developments



# Overview and Highlights

## ▲ A New Contract!

Contract negotiations have been finalized and we are pleased to announce that our sponsoring organizations have renewed their five-year funding commitment to the centre. Contract partners in the co-op sector include Credit Union Central of Saskatchewan, Federated Co-operatives Ltd., Concentra Financial, and The Co-operators. The Saskatchewan Ministry of Enterprise and Innovation provides additional support, and the University of Saskatchewan matches the combined contributions of the sector and the government with in-kind and monetary support.

The centre is grateful for the ongoing support and confidence of its sponsors. We know there are great expectations that go along with this and will strive to not only match but exceed past performance in this regard.

## ▲ Social Economy Project Update

Three more final reports have been edited, designed, printed, and posted to the website.

Nora has completed editing on two more projects, which are with authors for approval, and has two others awaiting her attention.

Work is ongoing with the exhibition of research results undertaken in partnership with the Diefenbaker Canada Centre — Building Community: Creating Social and Economic Well-Being. Summer student researcher Norma Brunanski did a wonderful job of pulling together text and photographs for three of the five modules. Roger and Nora will be responsible for the remaining modules. Diefenbaker Centre curator Teresa Carlson has done a fabulous job of designing the panels for the first module — eighteen altogether — which are at the final proofing stage prior to printing. This is a unique undertaking for the centre that has certainly stretched the skills of those of us involved. We are grateful for the patience and expertise of Diefenbaker Centre staff, who continue to support and guide us in this exciting project.

## ▲ Other Research Update

- ▲ the Community University Research Alliance application with CCA and others was submitted to SSHRC in September; we await a decision
- ▲ visiting scholar Jessica Gordon Nembhard's project with Lou on the impact of credit unions on communities in Saskatchewan and Manitoba; ongoing, with the assistance of Dwayne Pattison

- ▲ Lou's project on a gender analysis of the research being conducted within the Canadian Social Economy Research Partnerships; ongoing
  - ▲ Lou, Roger, and Dwayne's project examining amalgamations and mergers in the retail co-op sector; first draft complete and awaiting review
  - ▲ 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"; complete
  - ▲ 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's "Food Sovereignty in the Canadian Context: Issues, Initiatives, and Opportunities"; ongoing
  - ▲ Catherine's work on co-operatives and care services; ongoing
  - ▲ Catherine's comparative analysis of co-op legislation in Canada that enables the development of social co-operatives; ongoing
  - ▲ Catherine's work with CUISR on an evaluation of Crocus Co-op; new
- ▲ Conferences and Workshops
- ▲ CCA's National Congress, Ottawa, 16–19 June; Lou and Roger attended
  - ▲ Rural Co-operation in the 21st Century: Lessons from the Past, Pathways to the Future, Rehovot, Israel, 15–17 June; Murray attended and presented
  - ▲ Association of Cooperative Educators Institute, 28–31 July, Minneapolis; Roger attended
  - ▲ Rural Sociological Society Annual Meeting, 31 July–2 August, Madison, Wisconsin; Michael attended and presented
  - ▲ People Before Profit: The Response of Co-operatives to the Global Financial Crisis and Economic Recession, the ICA Committee on Co-operative Research conference, 2–4 September, Oxford, UK; Lou attended and presented
  - ▲ Impact: The Co-operators Youth Conference for Sustainability Leadership, 24–27 September, Guelph; Roger was a resource person and Lou moderated a session
  - ▲ BuildingPolicy4<sup>th</sup> the Social Economy, conference sponsored by the Atlantic and Quebec nodes of the Social Economy project, 30 September–2 October, Halifax; Catherine attended
  - ▲ Canadian Social Economy Hub meeting, September, Halifax; Catherine attended
  - ▲ 2nd International CIRIEC Research Conference on the Social Economy, 1–2 October, Östersund, Sweden; Michael attended
  - ▲ 110th anniversary conference of the Pellervo Confederation of Finnish Co-operatives, 19–22 September; Lou attended and made a keynote presentation

- ▲ Saskatchewan Co-operative Merit Awards, Regina, 13 October; Lou, Roger, and Michael attended
- ▲ Global Crisis — Co-operative Opportunity, the ICA General Assembly, 16–20 November, Geneva; Lou will attend

### ▲ Publications

We are pleased to have become a co-publisher with the Wisconsin Centre for Cooperatives of Murray and Brent Hueth's new book, *Co-operative Conversions, Failures, and Restructuring: Case Studies and Lessons from U.S. and Canadian Agriculture*; this will be a print-on-demand book accessed by ordering from an online printer.

- ▲ *Financing Aboriginal Enterprise Development: The Potential for Using Co-operative Models*, occasional paper by Lou and Kim Brown; published and posted to the website
- ▲ *Culture, Creativity, and the Arts: Achieving Community Resilience and Sustainability through the Arts in Sault Ste. Marie*, Social Economy report by Jude Ortiz and Gayle Broad, with community partners the Sault Ste. Marie and District Arts Council and the Sault and Area Community Development Corporation; published and posted to the website
- ▲ *Enabling Policy Environments for Co-operative Development: A Comparative Experience*, Social Economy report by Monica Juarez Adeler, with community partner SEED Winnipeg; published and posted to the website
- ▲ *South Bay Park Rangers Employment Project for Persons Living with a Disability: A Case Study in Individual Empowerment and Community Interdependence*, Social Economy report by Isobel Findlay, Julia Bidonde, Maria Basualdo, and Alyssa McMurtry, with community partners the Northern Regional Intersectoral Committee, Rossignol Community High School, and the Gary Tinker Federation for the Disabled; published and posted to the website
- ▲ *Co-operative Marketing Options for Organic Agriculture*, Social Economy report by Jason Heit and Michael Gertler, with community partner Advancing Canadian Agriculture and Agri-Food Saskatchewan; edited and designed, with Michael for approval
- ▲ *Eat Where You Live: Building a Social Economy of Local Food in Western Canada*, Social Economy report by Joel Novek and Cara Nichols, with community partners the Manitoba Food Charter and the West Broadway Development Corporation; edited and with authors for approval
- ▲ *A Co-operative Dilemma: Converting Organizational Form*, by Roger and Jorge Sousa; centre book, in process
- ▲ *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, centre book based on Social Cohesion research edited by Brett and Nora; in process

### ▲ Faculty/Staff/Student News

- ▲ Murray returned from sabbatical and has moved into his new office in the School of Public Policy just down the hall from us

- ▲ visiting scholar Jessica Gordon Nembhard completed her term with us and returned to her home university in Washington
- ▲ our librarian and LLL project administrator, Heather Acton, is off on sick leave and is greatly missed; we hope to have her back in the New Year
- ▲ former centre MA student Michael Chartier has joined us as a PhD student in the Co-op Concentration
- ▲ CUISR liaison Maria Basualdo has also joined us as a PhD student in the Co-op Concentration, while continuing to work full time at CUISR
- ▲ student researcher Norma Brunanski spent the summer with us working on the exhibition of research results for the Social Economy project; she left us in September when classes resumed
- ▲ Dwayne Pattison, a former centre MA student, continues to work with us as a contract researcher on a variety of projects
- ▲ Lindsey Bruce, an MA student in the School of Public Policy, is providing administrative support to the CASC Secretariat and assisting Catherine with her duties as president of the association

#### ▲ The Seminar Series

- ▲ Rico Geron, general manager of the Sorosoro Ibaba Development Cooperative (SIDC) in the Philippines, will make a presentation 5 November 09
- ▲ upcoming in December is our annual F.J.H. Fredeen Memorial Scholarship Seminar, which will be presented by Kama Soles, last year's winner

#### ▲ Visitors

Julie MacArthur, a PhD candidate at Simon Fraser University doing a dissertation on energy co-ops in Canada, spent some time with us in July, making good use of the library and having discussions with Catherine, Murray, and Michael.

In November, we will be having a visit from Rico Geron from SIDC co-operative in the Philippines, which hosted a recent visit from CCA personnel. While here, he will join us for lunch after the advisory board meeting, present a seminar, and have discussions with Michael and Murray.

#### ▲ Partners and Developments

Karl Baumgardner, Mary Beckett, Marilyn McKee, and George Keter will present verbal reports on the relevant activities of their organizations.

# 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 Tsevelmaa Chuluunbaatar (MA, Interdisciplinary Studies). She is a committee member for Monica Juarez Adeler, an InterD PhD student, and Nicoleta Uzea, Wu Haotao, Douglas Akhimienmhonan, and Fortunate Mavenga, 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, Mitch Diamantopoulos, Michael Chartier, and Maria Basualdo, all InterD PhD students.

### ▲ Research

- ▲ co-applicant on a five-year CURA application — Measuring the Social, Environmental, and Economic Impact of Co-operatives in Canada — submitted September 09; PI is Sonja Novkovic (St. Mary's University); other co-applicants include Leslie Brown (Mount Saint Vincent), and Ian MacPherson and Ana Maria Paredo (University of Victoria); CCA will administer the grant
- ▲ co-applicant on five-year CURA application, “Recherche partenariale sur les processus et les pratiques de gestion des entreprises d'économie sociale : innovations sociales, dynamique interne et arrangement institutionnel” (Research Partnerships in the Processes and Practices of the Management of Social Economy Enterprises: Social Innovations, Internal Dynamic, and Institutional Arrangement); PI is Denis Harrison, Département organisation et ressources humaines, UQAM.
- ▲ with Jessica Gordon Nembhard and Dwayne Pattison, partnered with Advantage and Affinity credit unions — a project titled “Impacts of Credit Unions on Communities in Saskatchewan and Manitoba: Measuring Member and Community Benefits and Asset Building from Credit Union Ownership”
- ▲ with the Canadian Women's CED Council, 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 with CCA for a SSHRC-funded CURA that proposes to examine the impact of co-operatives in Canada
- ▲ 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 Johnston Birchall, "Resilience of the Co-operative Business Model in Times of Crisis: A Report for the International Labour Organisation," *ICA Digest* 66 (June/July 2009)
- ▲ with Kim 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 as an occasional paper
- ▲ with Kim Brown, *Financing Aboriginal Enterprise Development: The Potential for Using Co-operative Models*, published
- ▲ "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, "Mapping the Social Economy in Aboriginal Communities in Canada" chapter in forthcoming book 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

- ▲ CCA's National Congress in Ottawa, 16–19 June; Lou attended and moderated a session
- ▲ "The Impact of Mergers on Credit Union Governance," presented to the annual meeting of the ICA Committee on Co-operative Research, Oxford, UK, 2–4 September
- ▲ "The Competitive Advantage of Consumer Co-operatives," keynote presentation to the 110th anniversary conference of the Pellervo Confederation of Finnish Co-operatives, Helsinki, 24 September
- ▲ Chaired session at Impact! The Co-operators Youth Conference on Sustainability Leadership, Guelph, 27 September
- ▲ "The Resilience of the Co-operative Business Model," presented to the Saskatoon Co-operative Network luncheon, Saskatoon, 16 October

- ▲ Global Crisis — Co-operative Opportunity, the ICA General Assembly, 16–20 November, Geneva; Lou will attend

## ▲ Administration

### *Specific to the Centre*

- ▲ contract negotiations consumed large amounts of Lou's time this quarter
- ▲ commitment leader for the Issues-Based Interdisciplinary Scholarship priority of the U of S Second Integrated Plan 2008–12; chaired meetings of the Working Group in August and September; participated in several breakfast meetings for the commitment leaders, as well as the Commitment for Change Poster Expo
- ▲ re-elected to the board of the Saskatchewan Co-operative Association; participated in one board meeting; member of HR subcommittee to conduct performance review for executive director; participated in flag raising and luncheon and attended Co-operative Merit Awards Banquet, Regina, 13 October
- ▲ appointed to the Government of Saskatchewan's Co-operative Sector Team, September 09
- ▲ member of steering committee for the September 2009 Youth Sustainability Conference hosted by The Co-operators in Guelph; also member of program design committee; participated in monthly conference calls for both committees; attended conference in September and returned for follow-up evaluations in October
- ▲ prepared for November management advisory board meeting

### *Specific to the Social Economy Project*

- ▲ arrangements for the transfer of funds to partner organizations for 2009–10
- ▲ review of text materials for exhibition of research results

### *As Chair of ICA Committee on Co-operative Research*

- ▲ assisting with organization of the annual conference in Oxford, September 09; chaired AGM of the Committee on Co-operative Research, 3 September
- ▲ organizing one-day research symposium in conjunction with ICA General Assembly in Geneva, 17 November; will chair Plenary Session II – Co-operative Resilience to the Global Crisis, ICA General Assembly, 19 November
- ▲ member of the steering committee of the Research and Policy Programme at the Co-operative College, Manchester; attended a meeting 4 September in Oxford
- ▲ attended the annual meeting of the UK Society for Co-operative Studies, 4 September, Oxford

## 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-investigator, “Coordination, Identity, and Success in a Federated Marketing System: Retail Co-operatives in Western Canada,” SSHRC funded
- ▲ co-investigator, “Adapting to New Environments: Agriculture and Rural Economies in the 21st Century,” SSHRC funded
- ▲ co-investigator, “Strategic Research Network on Social Innovation, the Social Economy, and Civil Society,” SSHRC funded

## ▲ Publications

- ▲ *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, Brett is author or co-author of four chapters; book is in prep for sending to UBC Press
- ▲ 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

## Murray Fulton

### ▲ Teaching

Public Policy 805.3: Economics for Public Analysis

BPBE 851.3: Agricultural Policy

## ▲ 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.

## ▲ Research

- ▲ principal investigator, “Adapting to New Environments: Agriculture and Rural Economies in the 21st Century”
- ▲ principal investigator, “Co-ordination, Identity, and Success in a Federated Marketing System: Retail Co-operatives in Western Canada”
- ▲ co-investigator, “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations”
- ▲ co-applicant, 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
- ▲ the role of producer associations in innovation activity, part of the Canadian Agricultural Innovation Research Network
- ▲ “Transformative Change in Biosphere Greenhouse Gas Management”

## ▲ Publications

- ▲ with M. Cule, “Business Culture and Tax Evasion: Why Corruption and the Unofficial Economy Can Persist,” *Journal of Economic Behavior and Organization*
- ▲ with James Vercammen, “Optimal Two-Part Pricing in a Carbon Offset Market: A Comparison of Organizational Types,” *Southern Economics Journal*
- ▲ with P. Bontems, “Organizational Structure, Redistribution and the Endogeneity of Cost: Cooperatives, Investor-Owned Firms and the Cost of Procurement,” *Journal of Economic Behavior and Organization*
- ▲ with Kathy Larson, “The Restructuring of the Saskatchewan Wheat Pool: Overconfidence and Agency,” *Journal of Cooperatives Special Issue*

## ▲ Presentations

- ▲ “Rural Cooperation in Canada,” to the Rural Cooperation in the 21st Century: Lessons from the Past, Pathways to the Future Conference, Rehovot Israel, June

## ▲ 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 204.3: Rural Sociology

### ▲ Graduate Supervision

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

### ▲ Research

- ▲ principal investigator, “Food Sovereignty in the Canadian Context: Issues, Initiatives and Opportunities”
- ▲ principal investigator, “Houses and Communities: Learning from a Case Study of Co-operative Assisted Home Ownership in Saskatchewan”
- ▲ 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”

### ▲ Administration/Professional/Outreach and Engagement

- ▲ associate member, School of Environment and Sustainability, 1 July 2008–
- ▲ associate member, International Studies Program, 2007–09
- ▲ management board member, Community-University Institute for Social Research, U of S
- ▲ member, Social Economy project administrative committee for CUISR
- ▲ 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, three Department of Sociology committees: Seminar, Graduate Studies, and Equity
- ▲ 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

Public Policy 848.3: Social Economy and Public Policy

### ▲ Research

- ▲ revised syllabus for Public Policy class
- ▲ article on co-operatives and care services has been submitted to the CIRIEC *Annals of Public and Co-operative Economics*
- ▲ contributed to the grant proposal for the CURA application with CCA and others
- ▲ working with Brett and Murray on the Social Economy project “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations”
- ▲ working with CUISR on an evaluation of Crocus Co-op
- ▲ reviewed a manuscript for Ciriec-Canada’s journal *Economie et Solidarité*
- ▲ work on the comparative analysis of co-op legislation in Canada that enables the development of social co-operatives is ongoing

### ▲ Publications

- ▲ with Brenda Parker and Kristen Springer, “Making Space for Graduate Student Parents: Practice and Politics,” *Journal of Family Issues*, vol. 30, no. 4 (2009)
- ▲ “Community-Based Home Support Agencies: Comparative Quality of Care of Co-operative and Nonprofit Organizations,” *Canadian Journal on Aging*, vol. 2, no. 2 (2009)
- ▲ “The Role of Co-operatives in Health Care: National and International Perspectives,” report on the health conference held in Saskatoon last October; completed, posted to website and available in our library
- ▲ her article on consumer involvement in the child care sector is in revision for the *Nonprofit and Voluntary Sector Quarterly*

### ▲ Conferences and Meetings

- ▲ BuildingPolicy4<sup>th</sup> the Social Economy, conference sponsored by the Atlantic and Quebec nodes of the Social Economy project, 30 September – 2 October, Halifax, attended
- ▲ Social Economy Hub meeting in Halifax, September, attended on behalf of centre

### ▲ 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 adjudicating the CASC awards (seventeen applications this year); chairing board meetings (two since last report); fundraising; assisting with production of the CASC newsletter; and communicating with members

## Jessica Gordon Nembhard

Jessica concluded her year with us as a visiting scholar but continues to work on the research it generated within the Social Economy project. Her work focusses on three areas within the broad topic of Measuring the Impacts of Social Enterprises and Co-operatives

- ▲ measuring the impact of the social economy on communities
- ▲ wealth accumulation and asset building through co-operative and shared ownership
- ▲ a comparison between the development, functions, and accomplishments of Aboriginal/First Nations co-operatives in Canada and African-American-owned co-operatives in the US

During the past summer she worked with Lou and researcher Dwayne Pattison on a pilot study titled “Impacts of Credit Unions on Communities in Saskatchewan and Manitoba: Measuring Member and Community Benefits and Asset Building from Credit Union Ownership.” Work on this project is ongoing.

Jessica is an associate professor in Community Justice and Social Economic Development, African American Studies Department, John Jay College, City University of New York.

## Nora Russell

### ▲ Editorial

- ▲ *Financing Aboriginal Enterprise Development: The Potential for Using Co-operative models*, occasional paper; proofreading changes entered, reformatted, print supervision; published
- ▲ “The Role of Co-operatives in Health Care: National and International Perspectives,” conference report; editing, layout, print supervision, published
- ▲ *Enabling Policy Environments for Co-operative Development: A Comparative Experience*, Social Economy project final report; editing, layout, print supervision, published
- ▲ *South Bay Park Rangers Employment Project for Persons Living with a Disability: A Case Study in Individual Empowerment and Community Interdependence*, Social Economy project final report; editing, layout, print supervision, published
- ▲ *Culture, Creativity, and the Arts: Achieving Community Resilience and Sustainability through the Arts in Sault Ste. Marie*, Social Economy project

- report; cover and front matter prep, print supervision, published
- ▲ *Co-operative Marketing Options for Organic Agriculture*, Social Economy project final report; editing, layout, with Michael for approval
- ▲ *Eat Where You Live: Building a Social Economy of Local Food in Western Canada*, Social Economy project final report; editing complete, with author for approval
- ▲ *Planting Vegetables, Sprouting Social Networks: Learning from Spirit Park Community Garden*, part of the *Eat Where You Live* Social Economy project; editing complete, with author for approval
- ▲ *Does Community Economic Development Promote Community Food Security?* part of the *Eat Where You Live* Social Economy project; editing complete, with author for approval
- ▲ *Walking Backwards into the Future*, centre booklet by George Melnyk, his keynote address to the CASC conference in June; editing complete, received comments back from author; awaiting Nora's attention
- ▲ *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, book-length manuscript; detailed editorial comments to all authors; comments back from all but one; in process of entering changes and additions, converting citations; researched submission guidelines for UBC Press; did preliminary work on a formal proposal for the press, which is with Brett for his contribution prior to sending off manuscript
- ▲ editing the minutes of the last advisory board meeting
- ▲ a great deal of ongoing work on the centre's exhibition of research results for the Social Economy project, editing, fine tuning layout, endless proofing
- ▲ co-ordination, writing, and layout for this director's report

### ▲ Other Activities

- ▲ wrote article on the exhibit for the fall CASC newsletter
- ▲ editing and layout for English version of the CASC fall newsletter
- ▲ prepared seminar ads
- ▲ prepared Co-op Week ad
- ▲ prepared nomination forms for Karl Baumgardner's Co-op Merit Award
- ▲ updating various things on the website in connection with publications
- ▲ completed a detailed survey on the centre for the European Research Institute on Cooperative and Social Enterprises, an Italian foundation interested in establishing relations with the centre
- ▲ prepared images and cutlines from various of our projects for SSHRC's annual report and other publications
- ▲ designed cover for joint publication with the BC-Alberta node of the Social Economy project

### ▲ Reprints

We had a record number of reprints this quarter. Nora prepared new cover files and front matter and supervised the printing of fifteen publications.

- ▲ *Co-operatives and Their Employees: Towards a Harmonious Relationship*
  - ▲ *The Future of Worker Co-operatives in Hostile Environments: Some Reflections from Down Under*
  - ▲ *Labour Relations in Co-operatives*
  - ▲ *The Management of Co-operatives: A Bibliography*
  - ▲ *A New Model for Producer Co-operatives in Israel*
  - ▲ *Patronage Allocation, Growth, and Member Well-Being in Co-operatives*
  - ▲ *The Property of the Common: Justifying Co-operative Activity*
  - ▲ *Worker Co-operatives and Worker Ownership: Issues Affecting the Development of Worker Co-operatives in Canada*
  - ▲ *Farmers, Capital, and the State in Germany, c. 1860–1914*
  - ▲ *Innovations in Co-operative Marketing and Communications*
  - ▲ *Leadership and Representational Diversity: Theory, Operationalization, and Measurement*
  - ▲ *Farm Machinery Co-operatives: An Idea Worth Sharing*
  - ▲ *The Meaning of Rochdale: The Rochdale Pioneers and the Co-operative Principles*
  - ▲ *Co-operative Membership: Issues and Challenges*
  - ▲ *New Generation Co-operatives: Key Steps in the Issuance of Securities, and The Secondary Trade*
- ▲ Professional, Outreach, and Other

Nora is a member of EAC Saskatchewan, a 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 is heavily involved in the management of the centre's exhibition of research results from the Social Economy project co-ordinated with the Diefenbaker Canada Centre. During the past few months he has devoted considerable time to pursuing funding support from a variety of government programs, internal university sources, and co-operative organizations. Along with Nora and Norma Brunanski, our USTEP student hired for the summer, he has spent many hours in meetings with Dief Centre staff and supervising Norma's research as she developed materials for the different modules and subthemes. This work is ongoing until the exhibit launch in May.

A new responsibility this quarter is serving as the centre's representative on Rural Team Saskatchewan, which consists of representatives from various departments of all government levels as well as community-based organizations with an interest in rural issues. It is co-ordinated by the Rural Secretariat of Agriculture and Agrifood Canada.

Other activities this quarter include the following:

- ▲ attended the CCA Congress in Ottawa in June, which celebrated CCA's 100th anniversary, saw the launch of the Canadian Co-operative Hall of Fame, and identified Alphonse Desjardin as Canada's Greatest Co-operator
- ▲ continues his term on the board of directors of the Association of Co-operative Educators (ACE), but stepped down as president, a role he held for three years; attended board meetings in Minneapolis in July held in conjunction with the annual ACE Institute, which he chaired
- ▲ attended Impact: The Co-operators Youth Conference for Sustainability Leadership, 24–27 September, in Guelph, where he acted as a resource person; Roger was on the Selection Committee for delegates and spent many hours whittling down the more than 300 applications received to the 180 limit
- ▲ attended the Co-op Merit Awards dinner, 13 October, Regina
- ▲ working on final revisions to his book co-edited with Jorge Sousa (University of Alberta), *A Co-operative Dilemma: Converting Organizational Form*
- ▲ member of the Finance Cluster of the Social Economy project; participates in the Social Economy project management advisory board meetings
- ▲ with Lou and Dwayne, co-ordinating the centre's research project examining mergers and amalgamation in the co-operative retail sector
- ▲ with Lou, working on final preparation of a "Toolkit" for the development of First Nations Co-operatives; this is the final product of an earlier project with the First Nations Agricultural Council of Saskatchewan
- ▲ responds to inquiries regarding New Generation Co-operatives and co-ops in general
- ▲ co-ordinates the activities of visitors to the centre; is the liaison with the centre's graduate students; and manages the centre's seminar series, which will take a slightly different form this year and align with the modules of the exhibit; this year will also see an effort to have presentations from CEOs and/or board chairs from co-ops rather than academic researchers
- ▲ alternate centre representative at the University of Saskatchewan Centre's Forum, which explores common issues and ensures that the respective centres' concerns are heard
- ▲ alternate centre representative to the Saskatchewan Co-operative Association

## Heather Acton

Heather has been on sick leave since June. We hope to have her back with us early in the New Year.

## 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; preparing the spreadsheet for reporting to the management advisory board
- ▲ maintaining the SSHRC project account and all other research accounts, including monitoring these accounts to ensure that the funds are expended in accordance with 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; obtaining any missing documentation from Central Registry
- ▲ 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:

- ▲ finalizing payroll for summer USTEP student Norma Brunanski at the conclusion of her research contract
- ▲ preparing payroll forms and scholarship contracts for Tsegi Chuluunbaatar and Michael Chartier, graduate students under the Social Economy project
- ▲ processing payroll forms for Dwayne Pattison, a contract researcher with a number of projects, and Lindsey Bruce, who is assisting Catherine with administrative work for CASC
- ▲ co-ordinating the transfer of funds to CUISR, Algoma University, University of Western Ontario, and the University of Winnipeg for year four of the Social Economy project; this involved co-ordinating transfer agreement letters, many signatures (PI, regional leaders of partner organizations, research services offices at each institution), and preparing cheque requisitions for each unit
- ▲ preparing the Statement of Account required by SSHRC for reporting purposes; gathering all the statements submitted by the institutions involved with the Social Economy project for 2008–09, verifying that the expenditures reported in each category were calculated accurately into one consolidated statement
- ▲ reviewing the expenditures in the Social Economy fund, placing them according to categories that had been created for each cluster, extracting the information from each category, and preparing a spreadsheet summarizing all the expenses that had been processed in the project fund
- ▲ working on the centre's year-end financial statements; this involved checking the monthly financial statements to ensure that all the paperwork was processed accurately, cross-checking previous months to make sure that the expenses relating to the 2008–09 financial year were cleared and allocated to the appropriate category, and finally, conversing with our financial consultant Barb Geib to ensure that each budget line balanced
- ▲ assisting Research Services in creating a new research account for Lou's work with ICA; this involved the usual paperwork and many signatures prior to approval

- ▲ processing payments for faculty and staff purchases and travel claims

Other responsibilities this quarter include:

- ▲ closely monitoring the various drafts of the new contract circulated to sponsors, gathering feedback, dealing with changes, and recirculating; circulating final draft for agreement; co-ordinating receipt of final signatures; once that is finalized, sending a complete contract all parties involved
- ▲ editing and preparing the June 09 management advisory board meeting minutes; obtaining agenda items for the next meeting, making arrangements for printing and couriering to board members
- ▲ participating in two training courses on the new on-line personnel system on campus
- ▲ making arrangements for posting the Librarian/Research Officer's position, which expired 30 June. This is Heather's position, but we were required to repost and accept applications, review them all, prepare letters of regret for the unsuccessful applicants, and then prepare new payroll forms and submit them to Human Resources for Heather's reappointment.
- ▲ co-ordinating a number of meetings, which involved the usual many phone calls and emails, booking rooms, and arranging for refreshments

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.

## Karen Neufeldt

Karen's regular duties include:

- ▲ reception
- ▲ paperwork, including processing 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:

- ▲ completing the editing of more than five thousand library records, a process begun in May
- ▲ checking in and routing of journals; assisting with circulation for patrons; reshelving returns; placing book orders

- ▲ transcribing the minutes of the June advisory board meeting
- ▲ co-ordinating the mailout of seminar series announcement and booking room for November
- ▲ copying course materials for Catherine's Public Policy 849 class
- ▲ arranging advisory committee meetings for Tsegi and Rochelle
- ▲ completing legal deposit for several new Social Economy final reports
- ▲ posting articles to the centre blog
- ▲ sending out notices for the Fredeen Memorial Scholarship
- ▲ co-ordinating the preparation of the packages for the Norm Bromberger Scholarship application for circulation to universities across Canada as well as to SCA and SaskCentral
- ▲ assisting with many travel, accommodation, car rental, and conference arrangements for centre personnel and others; processing travel claims upon return:
  - For Lou and Roger to attend CCA's National Congress in Ottawa, 16–19 June
  - For Lou to attend the ICA conference in Oxford, 31 August–6 September
  - For Lou to attend the Co-op Institute in Helsinki and Youth Conference in Guelph, 18–27 September
  - For Roger to attend the Youth Conference in Guelph, 24–27 September
  - For Catherine to attend the Canadian Social Economy Hub meetings in Halifax, 26 September–1 October
  - For Michael to attend the CIRIEC conference in Sweden, 29 September–6 October
  - For Roger, Lou, and Michael — hotel arrangements for Saskatchewan Co-op Merit Awards in Regina, 13 October
  - For Lou to attend the ICA General Assembly in Geneva, 14–17 November

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

## The Students and Contract Researchers

**Dwayne Pattison**, a former centre MA student, has joined the centre as a contract researcher. He has completed a second draft of his report titled “Post-Amalgamation Environments: Assessing the Impact of Retail Co-operative Amalgamations on Membership, Management, and Governance,” overseen by Roger and Lou. He is waiting for feedback, and in the meantime, will be presenting the findings at FCL's regional conference in Regina in November.

Dwayne is working with Lou and former visiting scholar Jessica Gordon Nembhard on a Social Economy research project titled “Impacts of Credit Unions on Communities in Saskatchewan and Manitoba: Measuring Member and Community Benefits and Asset Building from Credit Union Ownership.” He has completed the interviews for the pilot study and is evaluating the responses to see if changes are required to the questions or approach. He is currently attempting to

recruit credit union members to participate in focus groups. Advantage Credit Union in Melfort and Affinity Credit Union are the partners in this project.

Dwayne wrote two newsletter articles on funeral co-ops. The first focused on the Prairie Lily Funeral Co-op in Regina and was published in the July edition of the Saskatchewan Co-operative Association's *Co-operative Spotlight*. The second had a national perspective and will be included in the November edition of the Co-operative Housing Federation *NewsBriefs*. He is combining the two articles to make a longer report, which will eventually be a centre booklet.

In connection with this, he invited Annie Normandin from the Federation of Funeral Co-operatives of Quebec to come to Saskatoon to give a presentation. She is waiting to see if she can get CDI funding. To see if there is interest around the city for a funeral co-op, he started a Facebook page where people can sign up. It currently has four or five members.

Dwayne is also assisting Roger and Jorge with revisions to the final chapter of the Co-op Conversions book.

**Monica Juarez Adeler's** PhD advisory committee accepted her dissertation proposal in late June; she is now working on her ethics application. Monica is also the co-ordinator for our Social Economy partner in Manitoba, the Institute of Urban Studies at the University of Winnipeg. She completed her final report for the Social Economy project titled *Enabling Policy Environments for Co-operative Development: A Comparative Experience*. Nora did the editing and layout; it was published in early October and is available on the LLL website and from our library.

**Rob Dobrohoczki** is studying for his PhD comprehensives. He has one publication forthcoming; he assisted Brett with a chapter in the forthcoming book *The Self-Help Solution: Co-operative Renewal in Canadian Communities*. Rob gave papers on the global financial crisis at the St. Mary's Sobeys School of Business Symposium on Co-op Law and Policy in Halifax in June and at the ICA Reseach Conference in Oxford in early September. He will be teaching his class in Co-op Law next semester, and currently is president of the Good Food Junction Co-op at Station 20 West in Saskatoon.

**Zhao Jun** has completed the first draft of six (out of seven) chapters for his dissertation, which is on farmers' co-operatives in China. He intersperses this with other activities, recently contributing a concept paper on farmer co-operatives to the design of the World Bank's Henan Yellow River Ecology Livestock Project in China. The note analyzes the potential role of farmers' groups, particularly in animal waste management. It also emphasizes the importance of farmer ownership and control of these groups for maximum effectiveness in the development of the project. The World Bank is investing US\$80 million in the proposed project.

**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, while working full time as the head of the School of Journalism at the University of Regina. 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** is in his first term as a full-time PhD student in the InterD Co-op Concentration. His research topic is “A Whiteheadian Approach to Ethical Decision Making: How Could It Facilitate Effective Co-operative Governance?” He continues to work half time with the Saskatoon Public School system and also serves on the board of the Community Health Services Association.

**Kama Soles’s** Interdisciplinary Studies MA thesis, “Empowerment through Co-operation: Disability Solidarity in the Social Economy,” is investigating the potential of the co-operative model for empowering people with disabilities. Kama is finished her coursework and spent the summer completing her research. She is now in the final editing process and plans to defend in December.

**Tsegi Chuluunbaatar** is into the second year of course work for her MA in the Co-op Concentration. Her thesis is tentatively titled “Increasing Opportunities for Women in Rural Mongolia through Co-operatives and Co-operative Models of Development.”

**Patricia Elliott** is into her second year of course work in the InterD PhD. 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.

**Maria Basualdo** is in the first term of her PhD studies in the InterD Co-op Concentration. Her research topic is “Indigenous Women’s Community Development: A Comparison of Canada and Latin America.” Maria continues to work full time as the CUISR liaison and is heavily involved in Social Economy research projects.