



Government
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Communities Under Pressure

The Role of Co-operatives and the Social Economy

Synthesis Report
June 2006

Collaborators

Policy Research Initiative,
Government of Canada

Co-operative Membership
and Globalization: Creating
Social Cohesion through
Market Relations

Social Sciences and Humanities
Research Council

University of Saskatchewan

Human Resources and
Social Development Canada

Co-operatives Secretariat,
Agriculture and Agri-Food
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Social Sciences and Humanities
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Conseil de recherches en
sciences humaines du Canada



UNIVERSITY OF
SASKATCHEWAN



Human Resources and Social
Development Canada

Ressources humaines et Développement
social Canada



Co-operatives Secretariat
Secrétariat aux coopératives

ABOUT THIS REPORT

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PREFACE

Communities Under Pressure: the Role of Co-operatives and the Social Economy brought together policy makers, researchers, and practitioners to explore the experiences of an important component of the social economy. The goal: to inform the development of new responses by organizations and governments to the challenges communities face as a result of globalization.

The event was co-sponsored by the Policy Research Initiative (PRI), Human Resources and Social Development Canada (HRSDC), the Co-operatives Secretariat of Agriculture and Agri-Food Canada (AAFC), and the interdisciplinary research team,

“Co-operative Membership and Globalization: Creating Social Cohesion through Market Relations.” The team is administered at the University of Saskatchewan and funded by the Social Sciences and Humanities Research Council (SSHRC).

This synthesis report is based on the presentations and summaries provided by speakers and the discussions of the day. It identifies research findings and suggests policy implications and questions for future research.

The conference program can be found in Annex A. The presentations and summaries can be consulted on the PRI's web site at <www.policyresearch.gc.ca>.

1. INTRODUCTION

Globalization

One illustration of globalization is the increasing tendency of large retailers to source their products from across the globe and to establish outlets in many countries to pursue scale economies. Lower transportation and communication costs are making it easier for organizations to deliver goods and services over longer distances.

The strategies that organizations adopt to operate over a wider geographic area may or may not prove successful. Those that do prove successful generally involve introducing a lower-cost approach to delivering the goods and services that people want. Globalization involves, in part, passing on some of the reduction in transportation, communication and other costs to consumers across the globe.

Lower transportation and communication costs also expose individuals to a broader range of influences and opportunities. This is illustrated by the proliferation of Internet chat rooms where individuals build communities of interest made up of participants from around the world.

Governments in Canada are unlikely to prevent organizations from implementing new approaches to delivering goods and services. Nor are they likely to prevent individuals from expanding their horizons and building new relationships. If governments did prevent actions of this sort on a regular basis, the decline in living standards here, compared to other countries, would become substantial over time.

The Social Economy

Social economy enterprises deliver goods and services to individuals by combining democratic operating principles with an entrepreneurial orientation generally associated with for-profit organizations, and mission statements generally associated with non-profits. Their objectives are based on a combination of the common interests of members and concern about the well-being of others. Defined in this way, virtually all co-operatives are social economy enterprises.¹

The activities of co-operatives and other social economy enterprises make a considerable contribution to the Canadian economy. During the conference, Paul Simard, Director of the Co-operatives Secretariat, noted that co-operatives in Canada have about 155,000 employees, and that financial co-operatives alone have more than 3,600 points of service. More than 40% of Canadians are members of at least one co-operative. Lou Hammond Ketilson, from the Centre for the Study of Co-operatives at the University of Saskatchewan, noted that Aboriginal co-operatives have an enormous impact in some remote areas, accounting for more than half of all employment in some northern communities. The PRI has estimated that the social economy accounts for around 2.5% of GDP, making it larger than – to give three examples – the aerospace, mining and pulp and paper industries.²

Co-operatives provide goods and services to meet needs shared by their members, generally under open membership. They are often formed in situations where individuals who share a need do not feel well-served by other institutions, and are thereby marginalized to some degree. In addition, co-operatives, under policies authorized by their members, typically undertake activities that support communities and community development. This inclination toward both member and community service leads co-operatives to undertake a wide variety of activities in pursuit of a range of objectives. As indicated at the conference, co-operatives can and do:

- Provide high-quality services, at fair and reasonable prices, for the benefit of individuals and communities (as demonstrated by the presentation by Bernard Lefebvre from the Fédération des coopératives funéraires du Québec).
- Increase access to finance for previously excluded individuals and groups (Martine Vézina from HEC Montréal).
- Help drug addicts by providing methadone treatments (Brett Fairbairn from the Centre for the Study of Co-operatives at the University of Saskatchewan).

- Benefit members and also contribute to the health of the larger community (Melanie Conn from Simon Fraser University).
- Operate as a good food store, rooted in the community, while standing for something meaningful (Leslie Brown, Principal Investigator of the Social Economy Atlantic Node).
- Provide more affordable and traditional food sources and better housing for Aboriginal communities (Lou Hammond Ketilson).

For groups wanting access to particular goods and services, co-operatives and other social economy enterprises are an alternative to traditional for-profit firms. Collectively, they also provide a diverse range of benefits to the community at large.

Responding to Globalization

As noted by William Coleman, holder of the Canada Research Chair in Global Governance at McMaster University, globalization presents both opportunities and challenges to social economy enterprises. The opportunity to form new kinds of organizations to respond to new needs expands, while practices may need to change to maintain the commitment of members.

Some individuals are likely to experience negative repercussions from the successful introduction of lower-cost approaches to delivering goods and services by organizations. For example, there may be job losses among competitors, and consumers may be left with fewer choices. Large-scale introductions may prove harmful for entire communities dependent on a particular employer or industry.

While resisting globalization would cause living standards to fall over time, continuing to meet the needs of citizens may require helping individuals and communities that are adversely affected by global developments.

Depending on its objectives and lines of business, a given social economy enterprise might respond to globalization in one or both of two different ways. First, enterprises may want or need to change the way they conduct business so that they can reduce their costs, or to build new relationships or maintain existing ones with their members and the communities within which they operate. Activities of this sort may occur either in advance of or in response to similar actions taken by competitors. Second, organizations with public-service objectives may need to reach out to individuals who are harmed by globalization to help them find new opportunities.

The Remainder of the Report

Section 2 explores research findings, their associated policy implications, and unanswered questions identified at the conference concerning how social economy enterprises can continue to operate successfully in the face of globalization.

Section 3 explores implications for research and policy concerning how social economy enterprises can help individuals respond to globalization.

Knowing more about how governments treat different kinds of organizations and how different kinds of organizations perform in comparison to one another can help identify what governments should do differently. Section 4 explores findings, policy implications and unanswered questions from the conference relevant to that important issue.

Section 5 considers how researchers and policy makers might continue to work together to explore key policy research issues and act upon the results, with the ultimate aim of helping governments and other organizations better meet needs.

2. CONTINUING TO OPERATE IN THE FACE OF GLOBALIZATION

This section presents examples from the conference of how social economy enterprises are responding to some of the challenges and opportunities associated with globalization.

Bernard Lefebvre described how funeral co-operatives in Quebec increased their market share from 7% in 1993 to 12% by 2005, despite the arrival of multi-national competitors in the province during this period. He concludes that community mobilization, pooling resources in a consolidated network, and rapid reaction enabled these co-operatives to enhance the ratio of service quality to price, thereby gaining ground in all markets where they competed with multi-nationals. Over the longer term, while the average funeral cost was higher in Quebec than in the rest of Canada in 1972 (before the emergence of co-operatives), by 2000 this had been reversed. Moreover, the average funeral cost for co-operative network users in Quebec in 2000 was 40% less than the average across all providers in the province.

Among the success factors that Lefebvre identified for Quebec funeral co-operatives were the involvement of local leaders with a coherent vision that was identified as such by the community, and government recognition and funding for the co-operative model.

Leslie Brown described the case of the Consumers' Community Co-operative in Atlantic Canada, formed in 2001 from 28 previously independent co-operatives that had been losing market share to large national and global competitors. Since 2001, new business strategies have been introduced and the number of stores has been reduced to 17 viable operations.

Brett Fairbairn described how credit unions are adjusting their practices by serving larger regions. He has concluded that co-operative *systems* are a major reason for the success of local enterprises in an environment of globalization. Lou Hammond Ketilson agreed, based on her research on aboriginal co-operatives. Federations and centrals have helped local co-operatives by providing marketing, training and financial services. In contrast, co-operatives that are not effectively networked may be more

vulnerable. Fairbairn suggested that much can be learned from the experience co-operatives have had building networks.

Ian MacPherson, Co-Director of the Social Economy National Hub, noted that important issues are being raised by the trend towards systems of co-operatives. While it is possible to form new kinds of "communities" spread across larger geographic areas, it can become more difficult for local organizations to be responsive to their local communities. Brett Fairbairn cited from his research an example of a network of organizations that appears to be managing this tension quite well: multi-branch credit unions, which have been able to maintain the local character of individual branches.

William Coleman noted that the explosive growth of information technology represents an opportunity for organizations to first envision and then build new communities, an observation that served as a reminder that lower communication costs present organizations not only with challenges, but also with opportunities. John Anderson from the Canadian Co-operative Association and Melanie Conn from Simon Fraser University also noted that globalization can open up opportunities for organizations.

Brett Fairbairn has noted that the traditional tendency of co-operatives to represent communities of common interest places them on the front line in redefining identities in the context of globalization. In the past, identities tended to be narrowly and strictly based on individual towns, ethnic groups, and occupations. While globalization does not by any means wipe out such identities, it can destabilize them and overlay them with new and complex affiliations. Individuals experience new connections with regional, national, and trans-national causes and events (employment, culture, politics, etc.), which in some cases challenge traditional forms of identification. Community-based organizations depend on personal affiliations and hence must respond to changes in identities. Successful community-based organizations will help articulate

new identities (e.g., regional, transnational). Multi-branch co-operatives that define themselves as alternatives to national and transnational for-profit businesses, and those that appeal to non-geographic communities of interest (e.g., Mountain Equipment Co-operative) are signs of this process at work.

Murray Fulton, from the Centre for the Study of Co-operatives at the University of Saskatchewan, presented his research findings on the financial failure of several large agricultural co-operatives. He illustrated how inadequate governance facilitated poor management practices that reduced members' trust in and identity with these organizations, which over time led to lower performance.

Jean-Pierre Girard, from CRISES-Université du Québec à Montréal, has also found that governance issues are important. He observed that the boards of co-operatives can face conflicting pressures in the face of globalization (for example, between member representation and focusing on results, or between controlling and supporting management).

The findings of both Fulton and Girard raise governance questions that might be further explored to identify best practices for how organizations can continue to reflect member needs and manage tradeoffs.

So, what did the conference have to say about how social economy enterprises can continue to operate in the face of globalization? Part of the answer appears to be to continue to operate well, taking advantage of opportunities to increase service quality in relation to price through such means as adopting information technologies and building and making use of networks that provide common services. It is also important to explore new opportunities to meet shared needs while continuing to respond to the evolving needs and expectations of members and the broader community. The conference also identified questions and findings that might be explored further to identify best practices, notably in the area of governance.

3. HELPING PEOPLE RESPOND TO GLOBALIZATION

This section explores research presented at the conference that bears on how social economy enterprises can help individuals and communities under stress.

Polling results from Saskatchewan reported by Cristine de Clercy from the Centre for the Study of Co-operatives at the University of Saskatchewan indicate that the extent of the social economy is at least co-related with the need to respond to globalization, given that respondents indicated that co-operatives are more predominant in communities facing economic stress.

Several conference presenters offered findings and plausible arguments to support the view that social economy enterprises like co-operatives build the kinds of networks, connections, or social capital that individuals can use to respond to globalization and other pressures.

For example, Donna Mitchell, Executive Director of the Rural and Co-operatives Secretariat at Agriculture and Agri-Food Canada, argued that co-operatives are well positioned to think globally and act locally, since they develop local solutions within communities, and many are nationally and globally networked. Brett Fairbairn concluded that, based on his research, co-operatives can both mobilize and add to social capital. He also provided an illustration, noting that long-established co-operatives sometimes provide financial and organizational support to new co-operatives in cases where there is no obvious financial benefit from doing so.

Bill Reimer, from the New Rural Economy Project at Concordia University, suggested that social capital is a potential asset for community development and an important target for policy and programs. How governments enhance or inhibit the formation of connections is an important issue for future exploration. Sonia LHeureux identified a key knowledge gap: the dynamics of social capital formation in communities. Reimer also reported survey results indicating that available social capital isn't always used. This finding suggests that future research should look at how organizations and policies can support the exploitation of networks, as well as their formation. Leslie Brown also identified this issue as important.

A prominent objective for many social economy enterprises is increasing the participation of marginalized groups: that is, people who are excluded from active involvement in mainstream institutions. This issue was highlighted at the conference by Melanie Conn. She described how the integration of women into leadership positions in an economy that serves their needs is incomplete in many Canadian communities. She also showed that such integration issues are magnified when the women face additional barriers, such as not sharing the majority culture or language, lacking citizenship (as in the case of recent immigrants), or being economically dependent. The social economy enterprises described by Conn are helping individuals from marginalized groups to work together and overcome barriers.

Martine Vézina's research on the partnership models applied by two financial co-operatives indicates that organizations can expand their business while lowering the cost of financial products to help previously excluded individuals and groups to take advantage of business opportunities. Whether this finding might be applied in other sectors or jurisdictions, as Vézina suggests is likely, might be explored in future policy research.

Sonia LHeureux, Director General of Knowledge and Research at Human Resources and Social Development Canada, identified one of the sources that has informed research planning at the department. The 2005 study by Vaillancourt and Kearney³ applied theory and four case studies to identify best practices that governments and social economy enterprises could usefully apply in the future. There appears to be considerable potential for future research to build on the information already collected about the activities of a wide range of social economy enterprises.

What did the conference say about how social economy enterprises can help individuals respond to globalization? First, that these enterprises can and do build social capital that can be applied by both members and non-members to identify and take advantage of opportunities. Second, that they have delivered value to individuals by providing goods and services where one might have thought no viable market existed, and by supporting the efforts of individuals from marginalized groups to improve their circumstances.

4. THE COMPARATIVE PERFORMANCE AND TREATMENT BY GOVERNMENTS OF DIFFERENT KINDS OF ORGANIZATIONS

The conference revealed considerable variation across organization type, both within and outside the social economy.

- Leslie Brown observed that the social economy offers an alternative model of socio-economic dynamics, suggesting that it benefits from mutualism, individual and collective entrepreneurship, and competition. She noted that the social economy itself consists of alternative organization forms, ranging from large co-operatives to informal voluntary organizations.
- Lou Hammond Ketilson illustrated that co-operatives and other forms of social enterprise are one of several organization types that Aboriginal peoples might employ to support their development goals. She identified several alternatives to co-operatives, such as local small businesses (encouraging individual entrepreneurs), large national businesses (forming alliances with “Corporate Canada”) and local governments (developing the capacity of organizations such as band councils).

The conference also demonstrated the considerable variation that exists across current and potential government policies that can support – and in some cases inhibit – different kinds of organizations:

- Paul Simard described the Government of Canada’s Co-operative Development Initiative, which helps people develop co-operatives, and tests innovative ways of using the co-operative model.
- Scott Merrifield, Director of Policy, Planning and Coordination at the Federal Economic Development Initiative in Northern Ontario (FedNor), mentioned the Community Futures Program delivered by FedNor. Under this program, community-based, not-for-profit organizations governed by local volunteer boards support community economic development and the growth of small enterprises. Merrifield also noted that FedNor is making social enterprises eligible for its small-business programming.
- Donna Mitchell noted that the 2005 federal budget announced a tax deferral on patronage dividends re-invested in co-operatives. She

also pointed to the *Farm Improvement and Marketing Cooperative Loans Act*, which is currently under review. Mitchell noted that an investment tax incentive called the “Co-operative Investment Plan” has been proposed by the sector.

- Leslie Brown pointed out that it is not only through funding organizations that governments influence their activities. Governments also make rules that influence, among other things, the information that different kinds of organizations must report to the public. Ian MacPherson noted that, for co-operatives, regulatory provisions that bear on the responsibilities of organizations towards the communities within which they operate are especially important.

Donna Mitchell stated that one role of government is to level the playing field for supports provided to organizations. John Anderson provided a specific example, suggesting that co-operatives and other social economy enterprises need to have increased access to government procurement programs on an equal plane with private enterprise. Lou Hammond Ketilson provided a specific example of a regulatory provision that would be beneficial for some Aboriginal co-operatives that operate within a single province: the option to incorporate federally. She also suggested that laws, policies and programs need to be reviewed to determine if they facilitate or deter innovative approaches from being introduced by Aboriginal co-operatives. These appear to be plausible reforms that merit further consideration.

Two different kinds of research were identified at the conference that would help identify and explore additional reforms concerning what types of organizations should qualify for what types of support.

First, given that traditional for-profit businesses and social economy enterprises (including co-operatives) are by definition alternative ways to deliver goods and services, future research might assess the relative performance of different kinds of organizations. A few findings of this sort were identified at the conference.

- Brett Fairbairn reported findings from Alberta, Manitoba and Saskatchewan concerning the comparative performance of organizations as employers. Employees who had worked for both co-operatives and for-profit businesses tended to indicate that job quality was higher at the former.
- Case study results reported by Jean-Pierre Girard suggest that solidarity co-operatives – a new kind of organization introduced in Quebec during the 1990s – can increase access to goods and services and build social capital in ways that other kinds of organizations cannot.
- Case studies presented by Bernard Lefebvre and Martine Vézina included financial supports provided by governments. Future research might explore in further detail the costs and benefits to society of government investments of this sort.
- Alan Painter from the Policy Research Initiative identified six different ways that governments can provide funding to organizations: systematic support to address particular issues or policy priorities; investment funds with criteria; subsidization of financing provided by financial institutions; support through the tax system for individuals who purchase particular goods and services from particular kinds of organizations; voucher-based programs; and innovation pilots with lessons learned that are subsequently applied. Future policy research might add to, refine and compare these options to one another to identify what works best in which circumstances.

Second, future research might assess the effectiveness of different kinds of programs and policies. Several specific areas that would benefit from future research were identified at the conference:

- Scott Merrifield asked an important question that will need to be examined soon: Should the social economy pilots announced in the 2004 federal budget be extended or modified? He noted that procedures, methods and indicators will be needed to assess the longer-term impacts (or return on investment) of social economy initiatives for communities, organizations and individuals.
- Donna Mitchell observed that the impact of the Co-operative Development Initiative, which is scheduled to end in 2008, needs to be measured.
- Melanie Conn described the challenge co-op members face to become eligible for self-employment programs, e.g., HRSDC's Self Employment Program. With appropriate changes, Conn felt that the program could become an excellent potential resource for business development and start-up. Conn recommended that gender-focused research assess the impact of government policies on women in co-ops, particularly those policies that determine how income is calculated when individuals are using a co-op model to make a transition from social assistance to independence.
- Painter also suggested that future research could explore the potential application in Canada of changes made to regulatory framework policies in other countries, such as the introduction of Social Co-operatives in Italy and Community Interest Companies in the United Kingdom. The exploration could assess these examples in light of the status quo in Canada. Jean-Pierre Girard described one model already in Canada that might be adopted more broadly: the solidarity co-operatives introduced in Quebec during the 1990s, which have consumer, working and supporting members.

The next section explores how research on the comparative performance of organizations might be related to research on the effectiveness of different kinds of interventions.

5. FUTURE POLICY RESEARCH

So, what did the conference have to say about how researchers and policy makers might work together to explore issues and act upon their results? How can research continue to help governments and other organizations better meet the needs of people?

One suggestion from the conference is that more work on definitions and concepts may be needed. John Anderson noted that some co-operatives and some government officials are still unsure whether all co-operatives are part of the social economy. He offered several points to suggest that all of them are. Pierre Deveau, from le Conseil canadien de la coopération, indicated that the organization would like to see the co-operative movement recognized as a key player within the social economy.

Ian MacPherson noted that the concept of social economy varies in different cultures, and, in the case of Canada, within different regions. Consensus on the borders of the Canadian social economy remains elusive, at least outside of Quebec. An important outstanding question is whether this matters. While unambiguous definitions can make it easier to collect data, design policies and deliver programs, diversity across organization type may facilitate tackling a broader range of challenges. It seems clear from the conference that future conceptual work would be useful. Whether this work should seek a precise and unambiguous definition of the social economy remains an outstanding question.

Scott Merrifield argued that there is a need for baseline data in order to better understand the social economy. John Anderson noted that co-operatives are not included in the National Survey of Nonprofit and Voluntary Organizations, which is the largest survey of Canadian organizations that are neither for-profit businesses nor governments. Perhaps co-operatives should be included in further surveys of this sort.

Cristine de Clercy reported polling results that may have implications concerning the audience for future policy research. Municipal leaders in Saskatchewan find that the provincial government is considerably more supportive of co-operatives than the federal government. The explanation may

be financial, given that the vast majority of direct government funding provided to at least non-profit organizations comes from the provinces and territories.⁴ These governments are among the key clients for future policy research.

Several presenters described some of the resources that will be invested in policy research in the coming years and offered some suggestions for how that research should unfold.

- Ian MacPherson indicated that reflection continues on the key issues that will be examined under the Social Sciences and Humanities Research Council's social economy suite. The suite represents a \$15 million federal investment in research that aims in part to support the development of policies that better enable social economy enterprises and improve their effectiveness. A national hub (of which Ian MacPherson is the Co-Director) linked with four regional nodes has been announced to date. Two more regional nodes and grants for individual research projects will follow.
- Sonia L'Heureux indicated that Human Resources and Social Development Canada will be developing a research plan, and will continue its dialogue with others within and outside government to ensure the relevance of policy research. Her departmental colleague, Johanne Mennie, Deputy Director Responsible for Policy Development at the Community Sector Organizations Division, has concluded that the federal government's long-term strategy for the social economy will require an integrated and horizontal approach to national policy development. Scott Merrifield has concluded that there is a need for an evidence-based research agenda within and across federal departments and agencies.

Clearly, resources will be applied to conduct policy research, for which there will be an audience. What advice did the conference have to offer concerning *what issues* researchers might examine? Section 4 may have provided part of the answer by noting that there is variation across both the kinds of organizations that deliver goods and services, and

across the current and possible future government programs and policies that support some or all of these organizations.

Results from research that examines the comparative performance of different kinds of organizations could be combined with information about how different kinds of organizations are treated by governments to inform future policy development. One output might be a table that provides current treatment under different programs and policies (including under regulatory frameworks) by organization type (co-operatives, charities, other social economy enterprises, sole proprietorships, publicly held corporations, etc.). The table could be used to explore the rationale for variations in treatment across organization type. Results from that exploration could be combined with results from research which compares the performance of different kinds of organizations and the effectiveness of current

and potential initiatives to identify policy implications: i.e., recommended changes, additions and deletions to the current set of programs and policies.

A second area of research could identify best practices for co-operatives and other social economy enterprises and governments, along the lines of the study mentioned by Sonia L'Heureux that is described in Section 3. Work of this sort could analyze and synthesize the growing number of case studies and communicate the resulting best practices in ways useful to those who would apply them. The research should be evidence-based, draw from successes and failures, and involve researchers, practitioners, intended beneficiaries and policy makers.

The broadest conclusion to emerge from the conference was that researchers have a key role to play in identifying the policies, programs and practices that are best suited to help organizations help people.

NOTES

- 1 The Government of Canada's Co-operatives Secretariat defines co-operatives as "autonomous associations of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through jointly owned and democratically controlled enterprises."
- 2 Canada, PRI (Policy Research Initiative). 2005. *What We Need to Know About the Social Economy: A Guide for Policy Research*, July 2005.
- 3 Muriel Kearney and Yves Vaillancourt, *Local Communities: Interactions and Collaborations*, October 2005.
- 4 See Appendix 1 of Canada, PRI (Policy Research Initiative). 2005. *What We Need to Know About the Social Economy: A Guide for Policy Research*, July 2005, which also shows that the federal government provides considerable funding to provincial and territorial governments.

ANNEX A: CONFERENCE PROGRAM

March 3, 2006

Globalization, emerging markets and energy and other shocks are displacing economic activities in Canadian communities. The broad patterns are known: jobs are being lost in primary and secondary industries; the employment and location strategies of large employers are changing; and individuals are migrating in search of jobs or lifestyles.

Co-operatives in Canada have played an important role in organizing responses to community-level challenges for over a century. Collectively, they represent a large, networked and market-oriented resource for addressing local challenges in the face of economic restructuring. The social economy, which includes co-operatives, is a broader and newer conceptualization of how Canadians can address

challenges at the local level. The third sector is an even broader way of conceptualizing the space between governments and for-profit businesses.

Regardless of the conceptualization employed, the central interest remains the ways in which policy can and should support or enable community-level action. The purpose of the conference is to examine some experiences from the social economy in order to inform the development of new responses by organizations and governments to the challenges communities face as a result of globalization. Ancillary objectives include connecting researchers, policy makers and practitioners with common interests, and identifying issues for further research and policy development.

Agenda

8:30 - 9:00 **Registration and Continental Breakfast**

9:00 - 9:15 **Welcome and Introduction**

Jean-Pierre Voyer, *Policy Research Initiative, Government of Canada*
Brett Fairbairn, *University of Saskatchewan*

9:15 - 9:30 **Policy Context**

Joint presentation by Paul Simard, *Co-operatives Secretariat*
and Johanne Mennie, *Human Resources and Social Development Canada*

9:30 - 10:30 **Community Enterprise: Responding to Globalization**

Globalization poses challenges for community sustainability and self-reliance. It also creates new needs and opportunities for community action. The presentations in this session will facilitate a discussion of how globalization can put pressure on communities, as well as how the third sector can respond.

The Challenges of Globalization for Community and Autonomy

William Coleman, *Canada Research Chair in Global Governance, McMaster University*

Community Enterprise as a Response to Globalization

Brett Fairbairn, *University of Saskatchewan*

10:30 - 10:50 **Break**

10:50 - 11:50 Framing Policy for Community and Local Initiative

In this session, the presenters and participants will identify focal points for a policy-oriented perspective on the economic challenges facing communities and the possibilities offered by the third sector. Key questions include: How does or can community figure in policy? What is the significance of organizations and networks? What kind of social capital do Canadians have to work with, and how will their values and attitudes condition policy interventions and institutional forms?

The Connectedness of Community as an Element in Policy

Bill Reimer, *New Rural Economy Project, Concordia University*

Public Attitudes to Co-operation and Community

Cristine de Clercy, *University of Saskatchewan*

11:50 - 12:00 Introduction to Afternoon Sessions

What have we identified so far as key issues relating to community pressures and adaptation? In what areas are organizations and networks relevant to policy? What questions do we need to ask when examining the roles and experiences of the co-operative sector in adaptation processes?

12:00 - 13:15 Luncheon Speaker

Stories about Co-ops in the Social Economy

Melanie Conn, *Simon Fraser University*

Melanie Conn is a long-time community activist who was born in Toronto and has been working in community economic development (CED) since the early 1970s in Vancouver. In her work with credit unions, co-operatives and women's organizations, she developed an approach to CED that blends theoretical analysis with practical application. Since 1997, she has been an instructor at the Centre for Sustainable Community Development at Simon Fraser University. She is the Director of SFU's Certificate Program for CED Professionals, which she designed in response to the need for non-credit professional development opportunities for people working in CED. The program has students from a wide range of workplaces, including government departments, CED and other non-profit organizations, First Nations, environmental groups, and consultants. Melanie is also a member of DevCo, a co-operative of consultants. As a co-op developer and practitioner, she has provided technical and other development assistance for dozens of new co-operatives on governance; member and director training; business and financial planning; operations planning; policy development; and problem-solving. She is a founding director of the Canadian Women's CED Council and a director of GPI (Genuine Progress Index) – Pacific.

13:15 - 14:45 Learning from the Co-operative Experience in Canada: Research Findings, Policy Implications and Unanswered Questions – Concurrent Workshops

Co-operatives are a large, widespread, and highly institutionalized arm of community enterprise in Canada: over ten million Canadians are members of over ten thousand co-operatives. Co-operatives have developed extensive principles of governance and practice, and new forms and other innovations continue to be introduced. Two streams of workshops offer perspectives on key questions: what insights can be learned from the successes, limitations, innovations, and failures of co-operatives? What elements of their organization, development processes, training, and networking could be replicated in new settings in other sectors? These workshops drill down into key findings of new research.

Workshop 1: Governance Questions in the Co-operative Experience

Solidarity Co-operatives in Quebec: Successes and Lessons for Governance

Jean-Pierre Girard, *CRISES-Université du Québec à Montréal*

Business Failures and Governance: Learning for the Social Economy

Murray Fulton, *University of Saskatchewan*

Partnership Governance in Financial Co-ops: Illustration from the Community Development and Cultural Sectors

Martine Vézina, *HEC Montréal*

Workshop 2: Community Identity as a Factor in Economic Success

Region and Inter-Community Linkage: Consumers' Community Co-operative in the Atlantic Provinces

Leslie Brown, *Social Economy Atlantic Node*

Aboriginal CED: Past Successes and New Forms of Co-operative Enterprise

Lou Hammond Ketilson, *Northern Ontario, Manitoba and Saskatchewan Social Economy Node*

Funeral Co-operatives in Quebec: Lessons from a Success

Bernard Lefebvre, *Fédération des coopératives funéraires du Québec*

14:45 - 15:00 Break

15:00 - 17:00 Policy and Research Issues

Research Infrastructure

Ian MacPherson, *Social Economy National Hub*

Research Findings, Policy Implications and Unanswered Questions

Rapporteurs from the two workshop sessions

The Government of Canada's Perspective

Donna Mitchell, *Rural and Co-operatives Secretariats, Agriculture and Agri-Food Canada*

Sonia L'Heureux, *Human Resources and Social Development Canada*

Scott Merrifield, *FedNor, Industry Canada*

Alan Painter, *Policy Research Initiative, Government of Canada*

The Sector's Perspective

John Anderson, *Canadian Co-operative Association*

Pierre Deveau, *le Conseil Canadien de la Coopération*

17:00 Closure