



Director's REPORT

to the
Management
Advisory
Board

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

March 2010



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



An Honour for a Sponsor



Social Economy Project Update



A New SSHRC Research Grant



Other Research Update



Conferences and Workshops



Publications



Faculty/Staff/Student News



Seminars



Partners and Developments



Overview and Highlights

▲ An Honour for One of Our Sponsors

We are proud to note that one of our sponsoring organizations, Concentra Financial, has achieved “Platinum” status by being named one of Canada’s fifty best managed companies for the sixth consecutive year.

▲ Social Economy Project Update

One more final report has been edited, designed, printed, and posted to the website; two others have been edited and designed and are awaiting minor revisions prior to printing; three others are in various stages of editing and layout; two are awaiting initial editing.

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. Two of the five modules are printed and mounted ready for display. Roger and Nora have completed the research, writing, image collection, and permissions for the remaining three modules, while Diefenbaker Centre curator Teresa Carlson continues her wonderful design work on the panels. The official launch of the exhibition is set for 18 May, although the actual installation will be sometime in April.

The next regional workshop will take place in Sault Ste. Marie at the end of April.

▲ A New SSHRC Research Grant

We are delighted to announce our participation in a new Community-University Research Alliance spearheaded by the Canadian Co-operative Association (CCA) and funded by the Social Sciences and Humanities Research Council of Canada. In partnership with four Canadian universities, CCA has been awarded funding of \$1 million over five years to conduct research on the social, economic and environmental impact of co-operatives.

Research at the centre will focus on two projects. The first — “Measuring the Impact of Credit Unions on Wealth Building in Communities” — aims to better understand the precise benefits that credit unions provide their members and communities, and the specific ways that credit unions help their members create wealth, financial stability, well-being, and skills. The second project — “The Impact of Co-operative Housing on Household Income, Skills, and Social Capital” — will examine the economic and social impact of co-operative housing compared to other forms of affordable housing.

John Anderson, CCA’s Director of Government Affairs and Public Policy, is the lead co-op sector researcher on the project, while Sonja Novkovic, professor of

economics at Saint Mary's University is the lead academic researcher. Other partners include the University of Victoria and Mount Saint Vincent University, plus more than a dozen co-operative associations, co-ops, credit unions, and other academic researchers.

▲ Other Research Update

- ▲ 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 under review
- ▲ Brett's SSHRC project "Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations"; 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"; 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; ongoing
- ▲ Catherine's research on health services in Duck Lake in partnership with the Saskatoon Health Region and CUISR

▲ Conferences and Workshops

- ▲ "Global Crisis — Co-operative Opportunity," the ICA General Assembly, 16–20 November, Geneva; Lou attended, presented, and chaired plenary session
- ▲ Saskatchewan Co-operative Association and Conseil de la coopération de la Saskatchewan's Co-op Developer Training Seminar, 1–2 December, Saskatoon; Roger attended
- ▲ Federated Co-operatives Ltd.'s AGM, 1–2 March 10, Saskatoon; Lou and Roger attended; Lou performed the affirmation of office for new board members
- ▲ Saskatchewan Economic Development Association conference, 3–4 March, Saskatoon; Roger attended and hosted a booth; Lou attended and presented

▲ Publications

We are pleased to note that the Nonghyup Economic Research Institute, the research body for the National Agricultural Cooperative Federation in South

Korea, has requested permission to translate *Co-operative Conversions, Failures, and Restructuring: Case Studies and Lessons from U.S. and Canadian Agriculture* (ed. Murray Fulton and Brent Hueth), which the centre recently co-published with the Wisconsin Centre for Cooperatives.

The centre is partnering with Greg Marchildon, School of Public Policy (Regina), and the Canadian Plains Research Centre to produce a revised and expanded edition of Stan Rands's *Privilege and Policy: A History of the Community Clinics in Saskatchewan* in celebration of the Community Health Co-operative Federation's fiftieth anniversary.

Other publications activity:

- ▲ *Exploring Key Informants' Experiences with Self-Directed Funding*, Social Economy report by Nicola Chopin and Isobel Findlay; edited, designed, printed, and posted to the website
- ▲ *Walking Backwards into the Future*, centre booklet based on George Melnyk's 2009 CASC address; designed, printed, posted to website and available for sale
- ▲ *Self-Determination in Action: The Entrepreneurship of the Northern Saskatchewan Trappers Association Co-operative*, Social Economy report by Dwayne Pattison and Isobel Findlay; edited, designed, awaiting one small revision prior to printing and posting
- ▲ *Co-operative Marketing Options for Organic Agriculture*, Social Economy report by Jason Heit and Michael Gertler; 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; edited and designed, awaiting final check prior to printing
- ▲ *Cypress Hills Ability Centres, Inc.: Exploring Alternatives*, Social Economy report by Maria Basualdo and Chipso Kangayi, edited, awaiting feedback from community partner
- ▲ *A Co-operative Dilemma: Converting Organizational Form*, by Roger and Jorge Sousa; centre book, in process
- ▲ *Re-Thinking Social Enterprise: Co-operative Renewal in Canadian Communities*, centre book based on Social Cohesion research edited by Brett and Nora; in process

▲ Faculty/Staff/Student News

- ▲ Heather, our librarian and SSHRC project co-ordinator, has returned to work part time after being on sick leave for several months; it is wonderful to have her back in the office
- ▲ Skye Ketilson joined us briefly to assist with research on the Social Economy exhibition
- ▲ Tsegi Chuluunbaatar, our MA student in the Co-op Concentration from Mongolia, has unfortunately withdrawn from the program for health reasons

- ▲ Annette Johnson has joined us as a PhD student in the Co-op Concentration
- ▲ Dwayne Pattison, a former centre MA student who worked with us on a contract basis for almost a year, has left the centre for full-time employment with Western Economic Diversification; there he joins two other former centre MA students, Kim Brown and Jason Heit
- ▲ Monica Juarez Adeler, a PhD student in the Co-op Concentration, is this year's winner of the Fredeen Scholarship; congratulations Monica!
- ▲ centre PhD student Zhao Jun has switched into the School of Public Policy, which was a better fit for his program

▲ Seminars

- ▲ "Empowerment through Co-operation: Disability Solidarity in the Social Economy," 17 December 09, the 2009 F.J.H. Fredeen Memorial Scholarship Seminar delivered by Kama Soles

▲ Partners and Developments

The Co-operators — 2009 (Karl Baumgardner reporting)

Financial

Net income was \$74 million (2008 — \$52.8 million). Net income was negative at the end of the third quarter, but by the end of the fourth it was \$82.6 million (2008 saw a loss of \$14.3 million) Favourable weather and the positive Supreme Court decision regarding the Alberta Injury cap contributed to this success late in the year.

Challenges in 2009 included severe storms, rising replacement costs, and losses in the auto insurance area (especially in the Greater Toronto Area).

Some other indicators:

- R.O.E. — 6.5% (2008 — 4.8%)
- G.I.C. Premium — up 3.4% (2008 — 3.2%)
- Combined Ratio — 103.1% (2008 — 106.4%)
- M. Capital Test: 230% (2008 — 199%)
- Assets: over \$5.1 billion

Growth

The G.W. Premium fell short of plan but was a bit ahead of 2008. This reflects rate increases and new business, with most growth in the West.

Agencies grew to 487 (3 in Quebec), and the purchase of West Credit Union and Vancity Insurance in the Vancouver area will result in increases in 2010. Fire agencies will be opened in Quebec.

Co-operators Life purchased CUMIS (73% and Central 1 — 27%)

Clients

The percentage of multi-product households is increasing. CSI (Common Systems Initiative) focuses on the installation of new policy and claims technology across all companies. Client engagement scores are positive. (75–84%). Online quoting was launched on www.cooperators.ca. TIC Travel has a new emergency hospital and medical insurance for seniors (50–89 years).

Co-operatives

- ▲ the Democratic Structure Review was launched in 2009 and will be completed at the 2011 AGM
- ▲ the Federation of Alberta Gas Co-ops became the 47th member last December
- ▲ member-owner engagement scores rose from 81% (2007) to 89% (2009)
- ▲ the AGM will be held in Regina, 13–15 April
- ▲ co-operative development received more than \$1.3 million in grants and investments over the past seventeen years
- ▲ congratulations to CEO Kathy Bardswick, who was elected to the International Co-operative Alliance board

Trust and Reputation

- ▲ Alberta — The Supreme Court upheld the cap for whiplash injuries
- ▲ Saskatchewan – The lobby continues for SGI agencies
- ▲ Ontario — Auto insurance reforms announced; Sustainability Report will be released 5 May
- ▲ IMPACT Youth Conference — Twelve alumni received grants from The Co-operators Foundation
- ▲ donations to charities, co-ops, CED, etc. were \$1,723,462

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 supervisor for Rochelle Smith (PhD, Interdisciplinary Studies). She is a committee member for Monica Juarez Adeler, an InterD PhD student, and Nicoleta Uzea, Wu Haotao, Douglas Akhimienmhonan, PhD students, and Fortunate Mavenga, MA student, 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, Maria Basualdo, and Annette Johnson, all InterD PhD students.

▲ Research

- ▲ co-applicant on a recently awarded five-year CURA grant — Measuring the Social, Environmental, and Economic Impact of Co-operatives in Canada (see details on page 4)
- ▲ 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
- ▲ 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

- ▲ 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
- ▲ “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 working paper to be published by CIRIEC International
- ▲ “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

- ▲ “The Resilience of the Co-operative Business Model in Times of Crisis,” to the Saskatchewan Economic Development Association Conference titled Sustainable Saskatchewan, 3–4 March, Saskatoon
- ▲ “The Resilience of the Co-operative Business Model in Times of Crisis,” presentation at Global Crisis — Co-operative Opportunity, the ICA General Assembly, 16–20 November, Geneva

▲ Administration

Specific to the Centre

- ▲ commitment leader for the Issues-Based Interdisciplinary Scholarship priority of the U of S Second Integrated Plan 2008–12; during January to March, Lou has been involved in ten workshops with many different groups on campus; these meetings will result in a position paper, which will form the basis for further consultation with the campus community
- ▲ on the board of the Saskatchewan Co-operative Association; Lou participated in several conference calls and a strategic planning meeting regarding new funding for co-op development from Enterprise Saskatchewan
- ▲ member of the Government of Saskatchewan’s Co-operative Sector Team; Lou had several meetings with Wayne Thrasher and one meeting with the Sector Team to develop a proposal for funding to support co-op development, which will be submitted to Enterprise Saskatchewan
- ▲ IMPACT: The Co-operators Youth Conference for Sustainability Leadership; Lou was heavily involved in planning for this fall 2009 conference and returned

for follow-up evaluations in October and February; she is also a member of the adjudications committee for The Co-operators Impact Fund, which met by conference call in November

- ▲ prepared for March management advisory board meeting

Specific to the Social Economy Project

- ▲ in collaboration with the Community Economic and Social Development unit at Algoma University, Lou is planning the third and final regional forum; the theme is policy recommendations flowing from the many completed projects
- ▲ secured a one-year extension for completion of the Linking, Learning, Leveraging Project
- ▲ chaired two conference calls of the Management Advisory Committee
- ▲ reviewed and approved text for all modules for the exhibit

As Chair of ICA Committee on Co-operative Research

- ▲ organized one-day research symposium in conjunction with ICA General Assembly in Geneva, 17 November; chaired 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; the committee last met in conjunction with the ICA Research Forum in Oxford, September 2009

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 one PhD student:

- ▲ Mark McCulloch (History) "Women's Groups and Consumer Co-operatives in East Germany, 1949-71"

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 807.3: Political Economy

Public Policy 830.4: Decisions in Organizations

Bioresource Policy, Business, and Econ 842.3: Agricultural Industrial Organization

▲ Graduate Supervision

Murray is working with four graduate students, three of whom — Nicoleta Uzea, Wu Haotao, and Zhao Jun — are working on co-op and credit union related topics.

▲ 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-ops in this 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 Kathy Larson, “Overconfidence and Hubris: The Demise of Agricultural Co-operatives in Western Canada.” *Journal of Rural Cooperation* 37, no. 2 (2009), special issue on rural co-operatives titled *What Works, What Doesn't Work, and Ideas for Moving Forward*
- ▲ With Amalia Yiannaka, “Getting Away with Robbery? Patenting Behavior with the Threat of Infringement.” *Journal of Economics and Management Strategy*, accepted

▲ Administration

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

Michael Gertler

▲ Teaching

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

▲ Graduate Supervision

Michael has on-going supervisory duties for one MA student in sociology, one PhD student in the School of Environment and Sustainability, and one PhD student in the Co-op Concentration of Interdisciplinary Studies; he is also on advisory committees for one InterD MA student (co-operative studies), five InterD PhD students (four in co-op studies), and one PhD 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, Canadian Co-operative Association Ad Hoc Committee on Environmental Sustainability
- ▲ invited by deputy administrator of USDA — Cooperative Programs to participate in “Cooperative Research Needs” discussion group
- ▲ 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 810.3: Qualitative Method and Research Design

Public Policy 806.3: Public Policy Analysis (co-instructed with Peter Phillips)

▲ Research

- ▲ working on second round of revisions for a manuscript submitted to the *Nonprofit and Voluntary Sector Quarterly*
- ▲ submitted article on co-operatives and care services to the *CIRIEC Annals of Public and Co-operative Economics*
- ▲ working with Brett and Murray on the Social Economy project “Cognition and Governance in the Social Economy: Innovation in Multistakeholder Organizations”; conducted twenty-five in-depth interviews for two case studies; working on data analysis of first case study
- ▲ working with CUISR on a program evaluation of Crocus Co-op; developed a logic model that will be presented to members in early March
- ▲ in partnership with the Saskatoon Health Region, Duck Lake’s Primary Health Team, and CUISR, conducting an analysis of health services in the Duck Lake area; goal is to improve access to health services, to understand barriers and disparities among groups accessing health care within the community, to map the resources in the area and determine how they can be better utilized, and examine whether this information can be used to implement new services

- ▲ work on the comparative analysis of co-op legislation in Canada that enables the development of social co-operatives is ongoing

- ▲ 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; chairing board meetings; co-ordinating review of conference abstracts; fundraising; assisting with production of the CASC newsletter; and communicating with members
 - ▲ interviewed by Canada World Youth for a video on health co-ops
 - ▲ interviewed by the Association of Cooperative Educators on the subject of health co-ops for their upcoming newsletter

Nora Russell

Nora has spent countless hours working on the exhibition of research results from the Social Economy project due to be launched 18 May at the Diefenbaker Centre. This has included research, writing, and editing; photo research; acquiring permissions; co-ordinating approvals from academics, student researchers, community partners, and featured co-ops and credit unions for all text; adjusting original text with input from all parties; co-ordinating the flow of materials between the centre and Teresa Carlson at the Diefenbaker Centre, who is doing the design and layout of the panels; proofreading; fine-tuning design and layout with Teresa; checking and approving printing; and checking panels upon delivery. Despite the considerable time commitment to this huge and challenging project, she has also managed to keep up with her editorial duties (editing, design, and layout for approximately five hundred pages altogether), though work in the newsletter department has slipped.

- ▲ Editorial
 - ▲ research, writing, design, layout, and print supervision of the centre's annual report
 - ▲ *Exploring Key Informants' Experiences with Self-Directed Funding*, Social Economy project final report; editing, layout, print supervision complete; published and posted to website
 - ▲ *Self-Determination in Action: The Entrepreneurship of the Northern Saskatchewan Trappers Association Co-operative*, Social Economy project final report; editing and layout complete; awaiting one small addition from community partner prior to printing
 - ▲ *Cypress Hills Abilities Centres, Inc.: Exploring Alternatives*, Social Economy project final report; editing complete; with authors and community partner for approval
 - ▲ *Co-operative Marketing Options for Organic Agriculture*, Social Economy project

- final report; editing and layout complete, with Michael for approval
- ▲ *Eat Where You Live: Building a Social Economy of Local Food in Western Canada*, Social Economy project final report; editing and layout complete; awaiting final check prior to printing and posting
- ▲ *Planting Vegetables, Sprouting Social Networks: Learning from Spirit Park Community Garden*, part of the *Eat Where You Live* Social Economy project; editing and layout complete; awaiting final check prior to printing and posting
- ▲ *Does Community Economic Development Promote Community Food Security?* part of the *Eat Where You Live* Social Economy project; editing and layout complete; awaiting final check prior to printing and posting
- ▲ *Walking Backwards into the Future*, centre booklet by George Melnyk (keynote address to the 2009 CASC conference); editing, layout, print supervision complete; printed and available for sale; posted to the website
- ▲ *Re-Thinking Social Enterprise: Co-operative Renewal in Canadian Communities*, centre book; formal proposal to UBC press with Brett for his contribution
- ▲ editing the minutes of the last advisory board meeting
- ▲ co-ordination, writing, and layout for this director's report

▲ Other Activities

- ▲ wrote article for CASC spring newsletter
- ▲ prepared glossy promotional piece for announcement of centre's involvement in new CCA-sponsored, SSHRC-funded CURA
- ▲ layout of French version of the CASC fall newsletter
- ▲ wrote article for Canadian Social Economy Research Partnerships newsletter featuring Social Economy projects focussed on poverty reduction
- ▲ many, many hours helping Roger to prepare the SSHRC application for a Knowledge Mobilization grant to support the travelling component of the exhibition of research results
- ▲ co-ordinated the centre's participation in the two-day Graduate Recruitment Fair in November 09; prepared display materials, organized faculty participation, and personed the booth for most of the two days

▲ Reprints

- ▲ *Three Strategic Concepts for the Guidance of Co-operatives: Linkage, Transparency, and Cognition* (centre booklet)
- ▲ *South Bay Park Rangers Employment Project for Persons Living with a Disability: A Case Study in Individual Empowerment and Community Interdependence* (Social Economy research report)

▲ Professional, Outreach, and Other

Nora is a member of EAC Saskatchewan, a branch of the Editors' Association of Canada; she attended an editing workshop organized by the branch in November 09 and will be participating in a grammar workshop in late March 10. 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 be heavily involved in the management of the centre's exhibition of research results from the Social Economy project. During the past few months he has devoted considerable time to pursuing funding support from a variety of government programs, internal university sources, and a variety of co-operative organizations. He was successful in securing support from several sources and awaits a decision from SSHRC on a large grant application that would enable the second phase of this project — travelling exhibits visiting rural Saskatchewan, Manitoba, and Northern Ontario during the next couple of years.

In the absence of a research assistant Roger, like Nora, has spent many hours pulling text and artifacts together in support of the exhibition.

Other activities this quarter include the following:

- ▲ attended and hosted a centre display booth at the Saskatchewan Economic Development Association conference, 3–4 March in Saskatoon
- ▲ attended Federated's annual general meeting, 1–2 March 10 in Saskatoon
- ▲ represented the centre at the Snow Dome Classic fundraiser for the Co-operative Development Foundation, February, in Saskatoon
- ▲ participated in a co-op development training event hosted by the Saskatchewan Co-operative Association, December, in Saskatoon
- ▲ represents the centre on Rural Team Saskatchewan, a group comprised of reps from various government departments as well as community-based organizations with an interest in rural issues
- ▲ continues his term on the board of directors of the Association of Co-operative Educators (ACE)
- ▲ 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 returned to the centre on a part-time basis after several months of sick leave and is gradually working her way back into the routine of life at the centre. We are thrilled to have her back with us!

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:

- ▲ processing payroll forms for Lindsey Bruce, who is assisting Catherine with administrative work for CASC, and Skye Ketilson, who assisted Roger and Nora with the exhibition
- ▲ preparing and submitting the paperwork for Kama Soles's scholarship under the Social Economy project
- ▲ making the arrangements for Monica Juarez Adeler to receive the Fredeen Scholarship for 2010, which included notifying Grad Studies of the award, preparing the letter of offer, the scholarship contract, and payroll forms, obtaining numerous signatures, and providing all parties involved with copies of all documentation

- ▲ calculating dues and issuing invoices for each of our sponsor organizations for second and third quarter dues; processing journal vouchers for each sponsor's funds; completing the cash report forms and making deposits upon receipt of the dues
- ▲ making many adjustments to the Social Economy financial spreadsheet to ensure that all the expenses were identified and labeled for the appropriate category; we needed accurate totals for the various categories in order to determine the final installments that will be transferred to individual clusters
- ▲ preparing the electronic submission of the 2010–11 budget information for the Centre's main operating fund

Other responsibilities this quarter include:

- ▲ co-ordinating the purchase of several items of office furniture
- ▲ co-ordinating communications with SSHRC regarding the extension to the Social Economy project as well as obtaining information about the expenditure of all the funds received
- ▲ assisting in the collection of signatures for the Letter of Agreement for the new CURA we are involved with
- ▲ posting items to the centre's blog
- ▲ co-ordinating a number of meetings, which involved the usual many phone calls and emails, booking rooms, and arranging for refreshments

Patty attended several courses this quarter:

- ▲ a training session on completing an annual on-line questionnaire associated with the university's Internal Controls for 2009
- ▲ a course on the campus About-Us system, which enables her to obtain payroll information on people paid by the centre
- ▲ a course on making on-line payroll submissions for new employees as well as making changes on-line to existing payroll information
- ▲ a course that outlined the new procedures for on-line job applications associated with positions posted on the Human Resources website
- ▲ a workshop on the new procedures for processing payments for contracted services

In connection with the exhibition of research results:

- ▲ assisting Roger in corresponding with offices of the lieutenant governor and the U of S president and provost in order to co-ordinate a date for the official launch in May
- ▲ obtaining contact information for all of the CEO's, presidents, and board chairs of our sponsor organizations to inform them about the launch
- ▲ contacting our management advisory board members to inform them of the launch date; ascertaining their availability to attend the launch as well as a celebratory dinner afterwards
- ▲ contacting the U of S Development Communications and Donor Relations to make arrangements for Lou to discuss the acknowledgement of the centre's sponsor organizations during the launch of the exhibit

- ▲ preparing the paperwork for establishing a new account for the additional funding coming in for the exhibit; ensuring that cheques were deposited into the appropriate fund
- ▲ processing expenses associated with the printing of the panels for the exhibit

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 agenda materials, arranging for printing, 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:

- ▲ going through the twelve boxes of books donated by CCA, checking to see if they are already in our catalogue; if not, assigning call numbers, adding them to the catalogue, checking the U of S library and world catalogue databases for information; printing and compiling cataloguing information for Heather
- ▲ checking in and routing of journals; assisting with circulation for patrons; assisting with research questions; reshelving returns; placing book orders
- ▲ transcribing the minutes of the November advisory board meeting
- ▲ co-ordinating the mailout of the seminar series announcement and booking the room for December's Fredeen Scholarship seminar
- ▲ copying applications for this year's Fredeen Scholarship and distributing to the committee
- ▲ copying many course materials for Catherine's public policy classes
- ▲ organizing two meetings for Rochelle Smith's PhD committee; co-ordinating materials and ensuring the delivery of her dissertation to Grad Studies
- ▲ assisting with arrangements to bring Ann Hoyt from the University of Wisconsin to the centre as a visiting scholar
- ▲ posting articles to the centre blog
- ▲ assisting with travel, accommodation, car rental, and conference arrangements for centre personnel and others; processing travel claims upon return:

For Lou to go to Guelph for meetings with The Co-operators

For Michael to go to Ottawa to participate in the Committee on Environmental Sustainability meetings at CCA

For Catherine to go to Madison, Wisconsin, to conduct interviews for Brett's Cognition and Governance in the Social Economy project

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

The Students and Contract Researchers

Dwayne Pattison, a former centre MA student, spent almost a year with us as a contract researcher. He presented the findings of his report titled "Post-Amalgamation Environments: Assessing the Impact of Retail Co-operative Amalgamations on Membership, Management, and Governance," the research for which was overseen by Roger and Lou, at FCL's regional conference in Regina in November.

Dwayne spent some time 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 completed the interviews for the pilot study and did some work on evaluating the responses to see if changes were required to the questions or approach.

In December 09, Dwayne acquired a full-time job with Western Economic Diversification in Saskatoon. Though we are very pleased with his success at obtaining full-time employment, he will be greatly missed around the office.

With her proposal accepted by her committee in December, **Monica Juarez Adeler** is working on the ethics application for her PhD dissertation. She is the co-ordinator for our Social Economy partner in Manitoba, the Institute of Urban Studies at the University of Winnipeg. Monica is this year's winner of the Fredeen Scholarship. We are proud once again to have one of our students receive this significant award.

Rob Dobrohoczki is studying for his PhD comprehensives. He and Kama Soles had an article published in the Saskatchewan Co-operative Association's newsletter, the *Co-operative Spotlight* titled "Multistakeholder Co-op Legislation: The Need for Progressive Legislative Change." He has another publication forthcoming; he assisted Brett with a chapter in the forthcoming book *Re-Thinking Social Enterprises: Co-operative Renewal in Canadian Communities*. He is currently teaching a class in co-op law and is president of the Good Food Junction Co-op at Station 20 West in Saskatoon.

Rochelle Smith has finished the revisions to her PhD dissertation titled "The

Relationship of Saskatchewan's Co-operative Community Clinics with the Government of Saskatchewan: Towards a New Understanding." It is currently with the external examiner; Rochelle is expected to defend it this spring.

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 second term as a 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 is currently teaching a course in educational foundations on campus and also serves on the board of the Community Health Services Association.

Kama Soles is almost finished her MA thesis titled "Empowerment through Co-operation: Disability Solidarity in the Social Economy," which investigates the potential of the co-operative model for empowering people with disabilities. As last year's winner of the scholarship, Kama presented her work at the 2009 F.J.H. Fredeen Memorial Scholarship Seminar. She also co-authored an article with Rob Dobrohoczki titled "Multistakeholder Co-op Legislation: The Need for Progressive Legislative Change," which appeared in the Saskatchewan Co-operative Association's newsletter *Co-operative Spotlight*. Kama will defend her thesis this summer.

Tsegi Chuluunbaatar has unfortunately withdrawn from her MA program in the Co-op Concentration for health reasons. We are very sorry to lose her.

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 second 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.

Annette Johnson is our newest student in the Co-op Concentration; she is in the first term of course work for her PhD; her dissertation is titled "Finding a Way Out: An Investigation into the Amalgamation of Worker Co-ops and Canadian Unions."