Annotated Bibliography
On
The Social Economy

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The focus for this annotated bibliography was to provide a listing of resources on the Social Economy with special reference to communications. The resulting 78 entries cover the bases from academic articles and books to journal articles to on-line resources. The annotations provide background summaries of the sources, which should help those interested in this area to judge the relevance of the original material to their own needs.

Abramson, Alan and Lester Salamon. 2005. *The Nonprofit Sector and the Federal Budget: Fiscal Year 2006 and Beyond.* Working Paper Series. New York: Nonprofit Sector Research Fund, The Aspen Institute. Available on-line.

The focus is on the United States. The authors examine the new five-year budget plans developed by President Bush for the fiscal year 2006 and beyond, and suggest their potential impact on that country's non-profit organizations. They conclude that tough times may be ahead for many non-profit organizations.

Ahmed, Shamima. 2005. Desired Competencies and Job Duties of Non-profit CEOs in relation to the Current Challenges: Through the lens of CEOs' Job Advertisements. *Journal of Management Development,* 24 (10): 913 – 928.

This article uses content analysis to analyze non-profit CEO job advertisements during the 1999-2004 time periods. The aim of the paper is to assess the relevancy and adequacy of the emphasized competencies and job duties to deal with challenges in this sector (accountability, competition, identity). The author found that in those advertisements listing an education requirement, the majority required a degree in areas related to the non-profit sector. Under experience, fundraising experience is the most common requirement. Fundraising is also listed as the major job duty.

Austin, James E. 200. <u>The Collaboration Challenge: How Nonprofits and Businesses Succeed Through Strategic Alliances</u>. San Francisco, Calif: Jossey – Bass Publishers.

A how-to book that demonstrates how businesses can strengthen their bottom lines by partnering with non-profit organizations, and how non-profits can use such partnerships to further their charitable work.

Barman, Emily. 2002. *The Rise of the Donor: Organizational Strategies, Environmental Constraints, and the Field of Workplace Giving.* Working Paper Series. New York: Nonprofit Sector Research Fund, The Aspen Institute. (Available on-line).

This paper focuses on the effect of competition between non-profit organizations, on non-profit organizations. Through an analysis of the United Way, which once held a monopoly in workplace fund-raising, the author addresses the impact of competition on that organization. It is a comparative analysis of the United Way in the Bay Area (which has experienced competition from other non-profits) and the United Way of Chicago (which has experienced little competition). The author concludes that the presence of competition results in more choices being offered to donors to ensure their loyalty. The danger in this is that competition directs the attention of the non-profit away from the concerns of their clients and towards those of their donors.

Beland, Claude. 2000. "The Growing Relevance of Cooperative Values and Education. In Brett Fairbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-Operatives in the Year 2000 ; Memory, Mutual aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

This chapter opens with a brief examination of recent changes in banking, including deregulation and globalization. The author argues that the impact of these changes on co-operatives can be minimized if co-operative values and rules are maintained. He suggests that the future of co-operatives depends on today's co-operators: that they continue to operate according to co-operative values and make a commitment to co-operative education of those values.

Belhadji, Bachir. 2001. *Socio-economic Profile of Aboriginal Cooperatives in Canada.* Co-operatives Secretariat: Ottawa.

This paper is part of a larger research study (A Report on Aboriginal Co-operatives in Canada: Current Situation and Potential for Growth). The paper studies key areas of socio-economic performance in Aboriginal co-operatives, and examines that performance in comparison to Canadian consumer co-ops and retail sector. It finds that almost all residents are members; that Aboriginal co-ops are most active in the retail sector; that co-ops are consistent form of social business in Aboriginal communities.

Benander, Lynne and Tom Webb. 1999. *Marketing Our Co-operative Advantage.* ICA Congress, Quebec, Available on-line.

This article argues that Marketing the Co-operative Advantage (MOCA) can equal successful business outcomes. The authors emphasize the positives of marketing co-operatives and/or credit unions to build membership. They argue marketing co-op strengths can influence consumer behavior when the advantages to the consumer of doing business with the co-op are high-lighted. For example, participants in this study report a wide range of co-operative advantages including; community commitment, distribution of profits, and buying power. Recommendations include developing MOCA as an on-line resource. Ninety-six people and organizations participated in this study.

Benoit, Levesque and William A. Ninacs. 2000. "The Social Economy in Canada; The Quebec Experience". In Eric Shragge and Jean-Marc Fontan (eds.), Social Economy: International Debates and Perspectives. Montreal: Black Rose Books.

This chapter resents an examination of the 'Quebec model' of the social economy. It begins with definitions of, and approaches to the social economy, and raises issues this sector faces in relation to cutbacks in social services by both the provincial and federal governments. While stopping short of 'endorsing' the Quebec model, the authors acknowledge the challenges for the future facing the social economy in Quebec.

Ben-Ner, Avner. 2002. The Shifting Boundaries of the Mixed Economy and the Future of the Nonprofit Sector. *Annals of Public and Co-operative Economics,* 73 (1): 5- 40.

This publication acknowledges the existence of three separate sectors and their particular advantages in a mixed economy in providing goods and services. The author examines what lies ahead for the nonprofit sector in terms of the changes in information technology, the economy in general, and globalization. How will these affect the boundaries between the three sectors? Will nonprofits be able to satisfy the needs not met by the other two? The author argues that advancements reduce nonprofit advantages and favor the for-profit sector.

Boschee, J. 1998. Merging Mission and Money: A Board Member's Guide to Social Entrepreneurship. The Institute for Social Entrepreneurs. A monograph published by Board Source (formerly The National Center for Nonprofit Boards).

This article argues that the financial pressures felt by non-profits dictate that they make the transition to a culture of entrepreneurship. Non-profits must adopt a new attitude: take responsibility and stop depending on donations and government support. The author argues more and more non-profit leaders are becoming social entrepreneurs by designing income strategies to cover the cost of the organization (and not to make a profit). This means non-profits must spend time identifying areas which could cause difficulty making this transition. To succeed, social entrepreneurs must pay attention to the 'market' and not lose sight of the missions.

Boschee, J. 2001. <u>The Social Enterprise Sourcebook.</u> Minneapolis: Northland Institute.

This publication contains journalistic profiles of 14 non-profits that have successfully started social sector enterprises.

Boshee, Jerr and James McClurg. 2003. "Toward a Better Understanding of Social Entrepreneurship: Four Important Distinctions" (Available on-line).

The authors argue that 'social entrepreneurship' is one of the most misunderstood phrases in the nonprofit sector. They argue that unless a non-profit is generating earned revenue from its activities, it is not acting in an entrepreneurial manner – it is innovative. The distinction, they argue, is important within the context of sustainability of the non-profit. Public subsidies have been reduced and charitable donations are down; therefore, to be sustainable or self-sufficient, non-profits must move from innovation to entrepreneurship. They outline four distinctions fundamental to an understanding of entrepreneurship in the non-profit sector, and detail differences between: entrepreneurship and social entrepreneurship; sustainability and self-sufficiency; earned income strategies and social purpose business ventures; innovators, entrepreneurs and professional managers.

Brooks, Arthur C. 2000. Is There a Dark Side to Government Support for Nonprofits? *Public Administration Review*, 60, 211-218. American Society for Public Administration.

This article shows how government social spending may sometimes deter giving to the non-profit sector by donors. The studies indicate that the relationships between the two forms of giving (from the government and from the private donors) can both help and hurt an organization, depending on each organization's needs. The information can help an organization understand how it could collect funds from 'gift matching' or 'matching grants'.

Brooks, Arthur C. 2002. Does Civil Society Stop the Downward Spiral of Bad Government or Speed It Up? *Nonprofit and Voluntary Sector Quarterly*, 31: 140 – 144.

A short but interesting article which examines the nonprofit sector's influence on government. It asks the questions: is the nonprofit sector a self-correcting force for dysfunctional government or does it accelerate dysfunctional government? Does the nonprofit sector reinforce or correct bad government?

Brown, Leslie. 2000. "The Other Co-Operators: Women in Canadian Co-Operatives." In Brett Fairbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-operatives in the Year 2000: Memory, Mutual Aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

This chapter focuses on the role of women in co-operatives both historically and currently. It provides an overview of the problems women face within established co-ops. Focusing on research in Nova Scotia as well as globally, it emphasizes the contributions of previous generations of women within the co-op movement. The author argues that the nature of co-ops dictates that women take leadership positions, and briefly explores the need for women-only co-operatives to achieve this goal.

Cabaj, M. 2004. CED & Social Economy in Canada. *Making Waves*, 15 (1): 13-20.

The author demonstrates the important connection between the economic and social lives of communities and the various ways communities have worked to revitalize themselves. Initiatives described include; co-operatives, local development associations, and community development corporations. While geographic communities are one area of focus, the author also provides some details about the women's movement in Canada as an example of a group that fought against economic and social exclusion. Quebec is also used as an example of community-based initiatives, due to its strong community-based movement.

Cappellari, Lorenzo and Gilberto Turati. 2004. Volunteer Labour Supply: The Role of Workers Motivations. ***Annals of Public and Cooperative Economics*****, 75 (4): 619 – 643.**

The determinants of volunteering are examined in this paper. The authors examine the non-economic incentives to volunteering in Italian workers in three different areas: social services, political activism, and union activism. They conclude that the role of extrinsic and intrinsic motivations play a role in voluntary labour supply.

Carson, Emmett D. 2002. Public Expectations and Nonprofit Sector Realities: A Growing Divide With Disastrous Consequences. ***Nonprofit and Voluntary Sector Quarterly*****, 31: 429 – 436.**

This article addresses the image problem of nonprofits, and the possible disconnect between the public's expectations of the nonprofit and the reality of the organization. At all levels, there is a need to present to the public, an accurate picture of operational difficulties within nonprofit organizations. The author argues that the media must be corrected when any misrepresentation of nonprofits occurs. He states that the average citizen has an unrealistic and romanticized vision of what a nonprofit does and who nonprofit volunteers are (non-profits do not always use only volunteers).

Chaves, Rafael and Antonia Sajardo-Moreno. 2004. Social Economy Managers: Between Values and Entrenchment. ***Annals of Public & Cooperative Economics,*** **75 (1): 139 – 161.**

This article focuses on the key role managers play in social economy corporate governance. In determining the path social economy enterprises take, this article analyzes the central role of managers, the nature of these particular human resources, the variables that influence their behavior and decisions, and their ability to plan and implement strategies that strengthen or undermine the social economy identity of these enterprises. It also examines the options for management selection and control.

Connolly, Paul & York, Peter. 2002. "Evaluating Capacity-Building Efforts for Nonprofit Organizations." ***OD Practitioner,*** **32 (4): 33-39.**

The authors acknowledge that it is difficult to develop measurements of effectiveness for non-profit organizations since there is no financial 'bottom line' to appraise. They argue, however, there are many compelling reasons to evaluate these organizations. Evaluation generates new knowledge ad allows for the discovery of what works, for whom, and under what circumstances. Systematic evaluation helps to increase accountability and to compare the effectiveness of different activities. This article explains how non-profit organizations can evaluate activities, and processes for implementing evaluation methods and using and sharing results.

Connors, Tracy Daniel (ed). 2002. <u>The Nonprofit Handbook</u>. 3rd Ed. New York: John Wiley & Sons.

This publication brings together thirty-five experts in the field of non-profit management covering human resources, information technology, and other issues within the nonprofit context. These experts provide policies and procedures applicable to almost every non-profit organization. These experts provide policies and procedures applicable to almost every nonprofit organization. These crucial areas covered include: effectiveness, efficiency, and evolutionary environment. Also included are developments in areas such as management, organizational identity, effective operating and management strategies, and marketing and communications.

Dart, Raymond and Brenda Zimmerman. 2000. "After Government Cuts: Insights from Two Ontario 'Enterprising Nonprofits'". In Keith G. Banting (ed.), The Nonprofit Sector in Canada: Roles and Relationships. Montreal & Kingston: School of Policy Studies, McGill-Queen's University Press.

This chapter presents two case studies illustrating nonprofit organizations which turned to commercial ventures and the consequences for them. Noting that revenue from government sources has declined significantly, the authors examine the positives and the negatives of turning to 'business ventures' in response to the revenue shortfall. The authors note that the question of becoming 'business like' affects not only the bottom line, but also the public perception of the nonprofit. More importantly, this chapter deals with the unintended internal consequences on the organization itself. For example, in the case of the counseling organization, workers described how the 'type' of service (counseling) was changed through the process of becoming 'commercialized'.

Dayton-Johnson, Jeff. 2001. Social Cohesion and Economic Prosperity. Toronto: James Lorimar & Company Ltd.

Social cohesion is typically viewed as a predominant characteristic of the idealized, tight knit rural community: a characteristic now being undermined by the challenges of globalization. The author takes social cohesion to a national level and examines the link between social cohesion and economic performance, both in Canada and in countries around the world. He concludes that despite the problems caused by globalization, social cohesion can play an important role in creating prosperous societies today. He suggests that because of the dominant position economics holds in our global world, the only way to demonstrate the value of social cohesion is to demonstrate its economic value.

Dees, J. Gregory. 1998. Enterprising Nonprofits. *Harvard Business Review* (January-February).

Because non-profit organizations are experiencing fewer donations and less government support, many are turning to revenue-generating programs. The author analyzes the rationale of and prospects for those non-profits, and offers a social enterprise 'spectrum'. This spectrum runs from purely philanthropic to purely commercial non-profits: in the middles are blended organizations. He outlines some risks that non-profits need to manage in choosing to seek commercial income. These include the possibility of

alienating volunteers and staff who may not like some of the consequences of commercialization.

Dees, J. Gregory, J. Emerson, & P. Economy. 2001. Enterprising Nonprofits: A Toolkit for Social Entrepreneurs. New York: John Wiley & Sons.

Non-profit organizations have found that traditional sources of revenue are drying up, thus necessitating the adoption of entrepreneurial behavior and techniques. They are not trying to turn their non-profits into businesses, but entrepreneurial skills and attitude are seen as necessities for survival. The author argues that elements seen in successful for-profit businesses are also required for successful social enterprises. This is a hands-on book which includes lessons in: defining your mission, creating a business plan, identifying opportunities, managing risks, understanding customers, and handling of finances.

Dreessen, Erwin. 2001. What We Should Know About the Voluntary Sector but Don't. *Isuma*, 2 (2): 11-19.

This article calls for more knowledge about the non-profit sector in general. The author argues that while we have some knowledge about volunteering, major gaps remain in the accuracy of the data. For example, while we know about individual behavior regarding volunteering, we know little about volunteering over the life cycle. And we do not know to what extent data on volunteering are 'contaminated' by compulsory programs such as court-ordered community service.

Euske, K.J. 2003. Public, Private, Not-for-Profit: Everybody is Unique? *Measuring Business Excellence*, 7(4): 5-11.

This article argues that although some individuals maintain that the public, private, and not-for-profit sectors are fundamentally different in many ways, the three sectors have many similarities. The author claims that these similarities present opportunities to interact and learn from each other. A focus on the similarities rather than the differences can facilitate the exchange of ideas and learning across the sectors. While solutions many not always be similar, solutions used in one sector may be of benefit to another organization in another sector.

Fairburn, Brett. 2003. Three Strategic Concepts for the Guidance of Co-operatives. Centre for the Study of Co-operatives, University of Saskatchewan. (Available on-line.)

Traditionally, co-ops have been seen as having objectives that are either 'social' or 'economic'. The author suggests an integrate approach is more helpful, and presents three concepts for thinking about the bridging social and economic objectives. These concepts are economic linkages, transparency, and cognition. He argues that we must

build on the knowledge of past experiences of co-operatives in order to learn how to deal with changes for the future.

Fairbairn, Brett, June Bold, Murray Fulton, Lou Hammond Ketilson & Daniel Ish. 1991. Co-operatives and Community Development: Economics in Social Perspective. Saskatoon: Centre for the Study of Co-operatives, University of Saskatchewan.

While the focus is on co-operatives and credit unions in Saskatchewan and the Prairies, it applies elsewhere. The book emphasizes the unique roles and functions of co-operatives in communities and within community development. The book begins with an historical context of the growth of and need for co-operatives. It is particularly relevant today, as it places co-ops at the community level as a response to globalization and the reduction of the power of communities. The authors compare co-ops for profit businesses, and examine the potential of co-ops in terms of economic as well as social benefits. For example, because co-ops are not profit driven, they can make other decisions. The social implication of this is that co-ops succeed in maintaining services that profit-driven businesses have pulled-out of when the service was no longer profitable. The text links the importance of co-ops to community. For example, community residents tend to recognize the consequences of not supporting the local co-op. This is demonstrated through a discussion if economic 'leakages': that income into a community (wages) must be re-circulated within that community before it 'leaks' out of the community (profits to head office). Particularly insightful for those in small communities, communities united by occupation, and communities with needs not met by the government. The authors argue in favor of taking the co-op route to community development.

Fairbairn, Brett, Ian MacPherson and Nora Russell (eds.). 2000. Canadian Co-operatives in the Year 2000: Memory, Mutual Aid and the Millennium. Saskatoon: Centre for the Study of Co-operatives, University of Saskatchewan.

This publication provides a history of the Canadian co-operative movement. It examines the current state of this movement in terms of housing co-ops, women in Canadian co-operatives and health-care sector in Quebec. The authors examine the emergence of a new co-operative paradigm and the growing relevance of co-operative values and education. Discussion includes the challenges of marketing cooperative in a global society; how the movement adjusts to change, past and present, and what it will have to do in the future. They conclude there is no one model of co-op, and emphasize the importance of leadership required for new challenges. The essays are based on co-operative leaders' experiences as well as some theoretical work by academics.

Frumkin, Peter. 2000. Philanthropic Leverage. *Society*, Vol. 37, 40-48. Transaction Publishers.

Following the adage "Give a man a fish and you feed him for a day. Teach a man to fish and you feed him for a lifetime," this article argues that non-profit organizations must understand donation from the donor's perspective. If the non-profit can demonstrate to donors that by giving them a dollar, they will help them (the organization) become self sustainable, then the donor will be more likely to give to that organization as opposed to an organization that will continue to ask for donations.

Fulton, Murray. 2000. "A Systems Approach to the Challenges Facing Cooperative Education and Co-operatives." In Brett Fairbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-Operatives in the year 2000 : Memory, Mutual Aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

This chapter analyzes co-operatives and co-operative education as part of a network or social organization. From this perspective, the essay examines the importance of co-operative education within the emerging knowledge economy. He argues that the very notion of a knowledge economy suggest greater weight should be placed on knowledge, thus, education should be a key element for co-operatives.

Gill, Carmen and Luc Theriault. 2001. *State Recognition of Family Violence Services Delivered by Women's Shelters in Saskatchewan*. Occasional Papers, No. 14. Regina: Social Policy Research Unit, University of Regina.

This is an exploratory study focusing on women's shelters in Saskatchewan. The authors interviewed directors of women's shelters to examine the relationship between the directors and public officials. The focus is on the positive and negative factors impacting delivery of services because they are funded by the government. Negatives include the difficulty in applying for funding grants at the provincial level, a public perception that they are operating on behalf of the apartment of Social Services, and not enough autonomy in running their operations. The positive is seen in the recognition of government's determination to eradicate violence against women.

Gill, Carmen and Luc Theriault. 2003. Valuing Volunteering Without Recognizing the Reality of the Voluntary sector. *Canadian Review of Social Policy,* 51, 132-136.

An examination of the proposed framework as put forth by the Government of Saskatchewan (2002) (Voluntary Sector Initiative: Framework for Partnership Between Government and the Third Sector). The authors argue that the framework is too narrow in focus and not inclusive enough of the entire sector. While many voluntary organizations rely on volunteer boards of directors, they are also dependent on professional paid staff. They argue that government must recognize the sector as a whole and not just focus on the time spent by volunteers. Government must also focus on the working conditions within these organizations,

Girard, Jean-Pierre. 2000. "Co-Op Activities in the Health and Social-Care Sector in Quebec". In Brett Fairnbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-Operatives in the Year 2000 : Memory, Mutual Aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

The chapter discusses the role of the Quebec government in the development of social health care. The description of the co-operatives and their members – user, worker and organizational – is helpful in understanding the structure of health care co-operatives in that province.

Goldblatt, Mark. 2000. "Canada's Nonprofit Cooperative Housing Sector: An Alternative That Works". In Brett Fairbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-Operatives in the Year 2000: Memory, Mutual Aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

This chapter examines the role of the non-profit co-operative housing sector in Canada detailing the characteristics and development of housing co-operatives, their historical development, ad the role of government financing. It includes profiles of four women leaders in this movement in British Columbia, Alberta, Quebec, and Ontario. The chapter concludes with an overview of the prospects for non-profit co-operative housing in the future.

Griffiths, David. 2003. *Why Do Co-operatives Fail as Co-operatives?* The Co-operative Federation of Victoria Limited. (Available on-line.)

In examining the failure of some co-operatives, the author begins by differentiating between 'economic' failure and 'co-operative' failure. While economic failure is generally seen as failing as a viable business, unable to compete and generate profits, 'co-operative' failure is more complex. The author argues that while a co-operative may continue as a successful business – competitive, profitable and growing – it fails as a co-operative when it ceases practicing co-operative vales and principles, irrespective of its economic viability. The ingredients of failure exist in all co-operatives; however, co-operative failure is not inevitable.

Hall, Michael H. et al. (2005). *The Canadian Nonprofit and Voluntary Sector in Comparative Perspective.* Toronto: Imagine Canada. (Available online).

A collaborative effort between Imagine Canada and Johns Hopkins University, this report details findings within the Canadian non-profit sector, and provides a comparison of the Canadian sector with non-profit sectors in 36 other countries around the world. The report outlines five structural-operational features broadly defining social economy: organized, private, not profit distributing, self governing, and voluntary. This definition is applicable to Canada's sector which encompasses 'service delivery' in health, education, and social services. As a country with one of the largest and most vibrant

social economy sectors in the world, Canada differs from others in terms of its strong, volunteer presence. However, two areas of concern are highlighted: government funding is now short term only, and Canadians in general are now less willing to give of their time and energy.

Hopkins, Liza, J. Thomas, D. Meredyth & S. Ewing. Nov 2004. Social Capital and Community Building Through and Electronic Network. *Australian Journal of Social Issues*, 39 (4): 369-379.

This paper describes a social policy experiment in Australian public policy; the implementation of a "wired community" set up in a low-income public housing area by a not-for-profit internet service provider. This project is meant to test the proposition that computer networks can promote development participation in local communities. The authors draw on the concept of social capital; the invisible bonds that connect people and allow people to work together for the good of the group rather than the benefit of the individual. This paper examines some of the elements which make up community and considers the potential for electronic media to contribute to the well-being of social groups. While the wired community is attractive to policy-makers and funding bodies, it seems evident that low-income people who are social and economically excluded would benefit from greater "connectedness" with one another.

Inglis, Sue, Ted Alexander, and Liz Weaver. 1999. "Roles and Responsibilities of Community Nonprofit Boards. *Nonprofit Management and Leadership,* 10 (2): 153 – 167.

In this study, the roles and responsibilities associated with non-profit boards of directors are presented within a framework that includes Strategic Activities, Operations, and Resource Planning roles. This can be valuable for paid staff as well as volunteers in understanding the broad scope of the work of non-profit boards. Practical applications such as agenda setting for board meetings and designing board training and development activities are included.

Institute for Media, Policy and Civil Society. <u>Developing Effective Media Communication Skills</u>. *Activate*. Available on-line.

A short but practical article which covers the importance of dealing with the media for non-profit organizations. It includes the importance of preparing a spokesperson and a step-by-step guide to preparing a spokesperson.

Institute for Media, Policy and Civil Society. <u>Developing Effective Media Communication Skills</u>. *Activate*. Available on-line.

Like it or not, 'branding' is as important for non-profit organizations as it is in the for-profit sector. Why do non-profits need a brand? The article argues that non-profit organizations must 'brand' or're-brand' to be noticed and to take their place in the overall economy. Discusses the importance of 'brand management' between the nonprofit and

its audience in terms of 'value-based' branding. This article includes case studies of organizations which found it necessary to re-brand; Oxfam International and Muscular Dystrophy Canada.

Institute for Media, Policy, and Civil Society. IMPACS Media Communications Toolkit. *Activate*. Available on-line.

This source argues that media communications should not be an afterthought for non-profit organizations, but rather a key tool in achieving the organization's objectives. It presents common media tools for using various media to increase the public profile of the non-profit, and includes how to use these tools and why.

Jenson, Jane and Susan D. Phillips. 2000. "Distinctive Trajectories: Homecare and the voluntary Sector in Quebec and Ontario" in Keith G. Banting (ed.), The Nonprofit Sector in Canada: Roles and Relationships. Montreal & Kingston: School of Policy Studies, McGill-Queen's university Press.

A study of the emergence of two distinct ways of restructuring the delivery of homecare services. Ontario and Quebec are the focus of this chapter: two provinces which emphasize home care over institutional care, albeit with different policies. Quebec: CLSC (centre local des services communitarians) and Ontario: CCAC (Community Care Access Centres). This essay illustrates that both organizations straddle the border between the public and nonprofit sectors, with nonprofit and government players performing interconnected roles. Toward the end of the 20th century, the government of Ontario continued to rely on mixed public-private provision and a major role for nonprofit agencies with volunteer boards. It continued to reinforce the role of non-public agencies to deliver these services. At the same time, Quebec was turning away from non-public agencies as 'separate systems' and culminating relationships with the voluntary sector, calling for more community development, more local involvement, less centralization, and less institutionalization.

Juillet, Luc et al. 2001. "The Impact of Changes in the Funding Environment on Nonprofit Organizations". In Kathy L. Brock and Keith G. Banting (eds.), The Nonprofit Sector and Government in a New Century. Montreal & Kingston: School of Policy Studies, McGill-Queen's University Press.

As funding sources change, nonprofits must experiment with new forms of acquiring revenues. How does this pressure to respond to changes in the funding environment impact these organizations? Eight organizations are studied; two from each of environmental groups, health and social services groups, international development groups, and women's groups. Each organization experienced fluctuating levels of funding from government, corporate donations, commercial activities, fee-for-service contracts, and so on. The authors analyze the impact on each organization's (1) mission, (2) governance, and (3) program delivery. They conclude that the impact is not as severe as suggested in much of the existing literature: that despite the financial pressures, these

organizations were successful in resisting change and maintaining stability in their programs.

Ketilson, Lou Hammond. 2000. "Cooperative Leadership in the New Millennium". In Brett Fairbairn, Ian MacPherson, Nora Russell (eds.), Canadian Co-Operatives in the Year 2000: Memory, Mutual Aid, and the Millennium. Saskatoon: Centre for the Study of Co-Operatives, University of Saskatchewan.

With a focus on Saskatchewan, this chapter considers the characteristics required of leaders of co-operatives and credit unions in urban and rural settings. The idea of the need for collaboration during these challenging times is examined within the context of leadership characteristics and skill, and the community.

Ketilson, Lou Hammond and Ian MacPherson. 2001. *A Report on Aboriginal Co-operatives in Canada: Current Situation and Potential for Growth*. Saskatoon: Centre for the Study of Co-operatives, University of Saskatchewan.

This detailed report reviews the current state of Aboriginal co-operatives in Canada, and examines the applicability of the model in aboriginal community settings. Included are a series of case studies. Conclusions regarding the success of these enterprises are offered ad recommendations for future development are outlined.

Kunreuther, Frances. 2003. The Changing of the Guard: What Generational Differences Tell us about Social-Change Organizations. *Nonprofit and Voluntary Sector Quarterly*, 32: 450 – 457.

This article addresses the issue of generation-gap problems in nonprofits that threaten their survival. In-depth interviews with executive staff and young workers were conducted, and while they have many of the same personal qualities, their motivation for participation is different. Younger workers are characterized as trying to change the system, whereas, older workers work within it. Recommendations include: support for younger workers; making active development of younger staff a priority, and recognizing the contributions of younger workers.

La Piana, David & Michaela Hayes. 2005. M&A in the Nonprofit Sector: Managing Merger Negotiations and Integration. *Strategy & Leadership*, 33 (2): 11-16.

This article provides a variety of tools to help non-profit organizations determine whether to undertake merger negotiations, how to facilitate these negotiations, and how to integrate the post-merger organizations. The authors interviewed board members of non-profits that have merged and found that the critical point in the merger process occurs in the negotiation phase. This is where board members play a key role. This article alerts volunteer board members to the differences between mergers in the non-profit sector and in the for-profit sector. For example, in the non-profit sector, merger means partnership;

in the for-profit sector, merger means acquisition. For those contemplating mergers, this article provides a step-by-step guide.

Lasby, David & David McIver. 2004. Where Canadians Volunteer: Volunteering by Type of Organization. Toronto: Canadian Centre for Philanthropy & Volunteer Canada.

The importance and economic value of Canadian volunteers in the non-profit sector cannot be understated. Drawing on data from the National Survey of Giving, Volunteering and Participating (NSGVP), this report examines volunteering amongst Canadians and addresses the following questions: who volunteers, why do they volunteer, why do they volunteer for a particular organization . The authors focus their analysis on four specific types of organizations; Arts, Culture and Recreation, Social Service, Religious, and Educational organizations. The findings indicate that the likelihood of volunteering varies according to: organization type, method of initial involvement, and demographics. These findings can assist organizations that rely on volunteers to target their recruitment efforts.

Leonard, Rosemary, Jenny Onyx & Helen Hayward-Brown. Spring 2005. Quality Gifts: Issues in Understanding Quality Volunteering in Human Services. *Australian Journal of Social Issues,* 40 (3): 411-425.

The Australian government has set new requirements for funding for organizations providing human services. As result, there is increased pressure for these organizations to demonstrate the quality of their services. Four dimensions of 'quality' illustrate some of the contradictions surrounding these governmental expectations. Using focus groups and individual, in-depth interviews in the areas of health services, palliative care, family support, day care, disability, and youth services, the authors examine the notion of 'quality' from the perspective of clients, volunteers, and co-ordinators. Clients and volunteers perceptions of quality focused on strong, trusting, personal relationships. Co-ordinators used a combination of approaches to try to satisfy the demands of both clients and volunteers, as well as the bureaucracy.

Lewis, Dianne S, Erica French & Peter Steane. 1997. A Culture of Conflict. *Leadership & Organization Development Journal,* 18 (6): 275 – 282.

This article uses the example of a small, non-profit organization where conflict between the volunteers and paid workers, and among the volunteers themselves becomes the over-riding consideration in decision making, thus, paralyzing the organization. While conflict may be an incentive for action (and therefore helpful), it can also be damaging when it becomes the dominant feature in a non-profit organization. This internal conflict has the potential to impact on goal-setting, staffing, the conduct of meetings, problem solving and decision making and the writing of submissions for government funding.

Lewis, M. 2004. Common Ground: CED & the Social Economy – Sorting Out the Basics. *Making Waves,* 15(1): 7-11.

This article explores "the points of convergence and divergence between the territorial approach of CED and enterprise focus of the social economy." Lewis lists ten social and economic tasks important to building local economies. These include: social supports, education, health, infrastructure, accessible credit, and local ownership. Lewis calls for a combination of efforts to realize community development goals.

Masaoka, Jan, Jeanne Peters & Stephen Richardson. 2002. *A House divided: How Nonprofits Experience Union Drives*. Working Paper Series. New York: Nonprofit Sector Research Fund, The Aspen Institute.

Generally, most non-profit organizations are viewed as struggling with a lack of government funding, with an increased need for funds, and of late, with increased competition for funds. The authors argue that government contracts as a source of funding is often the impetus for union organizing within a non-profit. While careful not to take sides in the debate, in-depth interviews were conducted to examine the power of a union drive to divide an organization.

Meinhard, Agnes G., & Mary K. Foster. 2003. Differences in the Response of Women's Voluntary Organizations to Shifts in Canadian Public Policy. *Nonprofit and Voluntary Sector Quarterly*, 32(3): 366-396.

Through a gender lens, this paper investigates differences in attitudes, behaviors, and adaptation to the changing climate within the non-profit sector. Women's voluntary organizations are generally categorized as organizations run by women for women; however, in this paper the authors define any organization with a governing board composed of at least two thirds female as a women's organization. Using self-report survey data, they compare 'women's' organizations with 'gender neutral' organizations in terms of their response to current challenges. The findings reveal women's organizations (as defined by the authors), are less likely to adopt business-like strategies and are more likely to collaborate with others. Women's organizations are also more critical of government policies, following "the long tradition of women's organizations agitating for their own rights as well as those of the needy and downtrodden."

Mitchell, Darcy, Justin Longo & Kelly Vodden. 2001. "Building Capacity or Straining Resources? The Changing Role of the Nonprofit Sector in Threatened Coastal Economies". In Kathy L. Brock and Keith G. Banting (eds.), The Nonprofit Sector and Government in a New Century. Montreal & Kingston: School of Policy Studies, McGill-Queen's University Press.

The study area is the Northern Vancouver Island region of British Columbia which is a rural, resource dependent area (fishing, lumber, minerals). This chapter looks at the rural community level and studies agencies concerned with: economic development, natural resource management, and the environment. The authors hypothesize that the withdrawal of government from the provision of services would encourage local collaborative efforts by community agencies, thereby enhancing social cohesion. However, they conclude the

effect has actually weakened local and nonprofit sectors. They examine three collaborative organizations and find that they tend to be advisory, failing to give local communities little power over local resources. They found that the creation of collaborative organizations as intermediaries between community and government may help governments more than it does local communities.

Murray, Vic, Pat Bradshaw and Jacob Wolpin. 1996. "Women on Boards of Nonprofits: What Difference Do They Make?" ***Nonprofit Management and Leadership,*** **6 (3): 241 – 254.**

In this article, the authors explore the impact of women on non-profit boards. They look at the actual proportion of women on boards and at the sex of the chief executive officers in order to examine the impact of these variables on effectiveness, structure, and process. Based on data from a cross-section of Canadian non-profits, the results indicate that as the percentage of women on a board increases, the dynamics of the board are significantly affected.

Neamtan, N. 2004. The Political Imperative: Civil Society & the Politics of Empowerment. ***Making Waves*****, 15 (1): 26-30.**

Neamtan demonstrates how community economic development (CED) corporations are indicative of a desired shift by many Canadians towards inclusiveness and collaboration. Quebec is presented as a province in which "social economy is one of the strongest and most visible progressive movements". She argues that changes elsewhere will only occur when people are in control, collaborating and creating alliances. Required changes also include a re-thinking of progressive governance.

Ninacs, William A. 2000. "Social Economy: A Practitioner's Viewpoint". In Eric Shragge and Jean-Marc Fontan (eds.), Social Economy: International Debates and Perspectives. Montreal: Black Rose Books.

This chapter is a 'bottom-up' analysis which examines Quebec's social economy from a practitioner's point of view. It includes women's groups, the communitarian movement, the co-operative movement, and the labour movement. The author concludes that while Quebec's track record is positive, many groups continue to face dilemmas as the social economy remains marginal in terms of economic development. He argues that it's potential to take its place within the traditional economy, as a tool to eliminate social inequality as opposed to simply 'managing' it, is not recognized by government.

OECD. 2003. The Non-profit Sector in a Changing Economy. Paris, France: Organization for Economic Co-Operation and Development.

Countries examined in this book include EU countries, USA, Mexico, Canada (Quebec), and Australia. Common trends are found in the non-profit sector in each of these countries: the sector is becoming more entrepreneurial and less dependant on public

funding. The publication provides evidence of the sector becoming innovative in raising money by adapting its management methods to cope with constraints and opportunities arising from economic and social trends. At the same time, the major challenge to the sector in each country is to not loose its distinctiveness. Themes include: innovative trends in different geographical zones; hw this sector is financed in each country; an evaluation of the sector in terms of social value and its contribution to economic development; and the interdependence between this sector and other sectors of the economy. While this sector has grown in importance in each country, its place is still somewhat limited. A gap clearly exists between the role of the non-profit sector at the local level and the recognition it receives at the national level.

Padanyi, P. and B. Gainer. 2003. Peer Reputation in the Nonprofit Sector: Its Role in Nonprofit Sector Management. *Corporate Reputation Review*, 6 (3), 252 – 265.

This paper examines the importance of reputation to non-profit organizations. Any organization has several different reputations. Managers of non-profits need to think beyond how their organization is perceived by the general public and be aware of the reputation of their organization among different key interest groups. This paper examines this issue through a set of the relationship between peer reputation and other non-profit performance variables. It provides evidence that an organization's reputation among managers if similar non-profit organizations influence its success in attracting resources. It also provides evidence that an organizations peer reputation is affected by other non-profit performance factors such as client satisfaction.

Quarter, J. 1992. Canada's Social Economy, Cooperatives, Non-profits, and Other Community Enterprises. Toronto: Lorimer.

Viewed as a portion of the economy that falls between private-sector business and state corporations owned by governments, the social economy can be described as the 'bridge' between social policy and economic policy. The author begins by describing the social economy, its key components and common dimensions. While the focus is on Canada's social economy, there are international examples which have had an impact in this country. Focusing on co-operatives and nonprofits, case studies are presented in the areas of housing, healthcare, childcare, and regional development. The author explores new approaches to ownership and management, new ways of managing social services, and new forms of ownership.

Quarter, Jack, B.J. Richmond, Jorge Sousa and Shirley Thompson. 2001. "An Analytic Framework for Classifying the Organizations of the Social Economy". In Kathy L. Brock and Keith G. Banting (eds.), The Nonprofit Sector and Government in a New Century. Montreal & Kingston: School of Policy Studies, McGill-Queen's University Press.

This chapter addresses the complex issue of classifying organizations in the social economy. In the past, organizations have generally been classified on a one-dimensional

system (their type of incorporation or type of service). This study employs a multi-dimensional approach using five dimensions: social objectives, relationship to government, relationship to the market, democratic decision making, and volunteer participation. This preliminary study illustrates that not all social organizations are alike. It provides evidence of the diversity within the social economy and the complexity of relationships between co-operatives and nonprofits, and between politics and the economic system.

Quarter, J., L. Mook, & B. J. Richmond. 2003. What Counts? Social Accounting for Non-profit and Co-operatives. New Jersey: Prentice Hall.

An integrated approach used in this book broadens financial accounting by building in 'social' variables. While traditional accounting procedures focus on financial considerations, this text acknowledges the broader considerations of social inputs and social outputs. This text presents new tools of analysis which are adaptations of three traditional financial accounting reports: the income statement, the balance sheet, and the value added statement. Additionally, it includes a Community Social Return on Investment model (chapter 4) to enable social organizations to measure their social impact. A unique feature of the text is the integration of important non-monetized items into accounting statements by assigning an appropriate value to those items that do not involve market transactions. Chapter 8 presents a social accounting toolkit that explains how to assess outputs and other social variables. It offers detailed examples on how to assess volunteer functions, how to assign a market value to them, and how to identify social outputs and place a value on them. Social accounting can create a deeper appreciation of the contribution of these organizations, not only for the community at large, but for those who work and volunteer at these non-profits. Chapter 9 discusses cautions and the limitations of social accounting.

Rawsthorne, Margot. Winter 2005. Community Development Activities in the Context of Contracting. *Australian Journal of Social Issues*, 40 (2): 227-240.

In Australia, relations between the government and community sector organizations have undergone change. Funding arrangements have changed and contract with service expectations, performance measurements and reporting requirements have been introduced. This article examines the experience of community sector organizations to explore how contractual arrangements have affected some aspects of their community development activities. Potential negative impacts include: re-positioning community organizations as 'service providers'; the erosion of organizational autonomy; a loss of mission and purpose; a loss of co-operation and collaboration between organizations in an increasingly competitive environment. This article finds that while contracting has been detrimental to some organizations, overall, the adverse impacts have been less than anticipated.

Richard, P. 2004. Transformed by Community Economic Development: Southwest Montreal Now Has a Future as Well as a Past. *Making Waves*, 15(1): 21-25.

The author explains the establishment of RESO (a community development organization) and its various activities in moving Southwest Montréal from a devastated area to a region looking at sustainable development and revival. Democracy and collaboration are highlighted as keys to community economic development. Challenges such as partnerships with public agencies and attaining financial autonomy are also mentioned.

Scanlan, Eugene A. 2002. Strategic Task Forces. *International Journal of Nonprofit and Voluntary Sector Marketing,* 7 (4): 334-342.

A case study is presented to demonstrate how the use of 'Strategic Task Forces' is an effective way to address immediate needs of non-profit organizations. For example, marketing to build awareness and recognition or to specifically raise funds, or developing highly networked new volunteers. This strategy is seen as particularly effective in meeting these challenges which cannot be resolved by staff, board members and other volunteers.

Simon, Judith Sharken, J. Terence Donovan. 2001. <u>The Five Stages of Nonprofit Organizations: Where You Are, where You're Going, and What to Expect When You Get There</u>. Saint Paul, MN: Amherst H. Wilder Foundation.

This book was written to help not-for-profit leaders and managers, board members, and donors. The authors present a model for the five life sages of non-profit organizations to help them understand their organization's status ad prepare it to move ahead in the future. The life stage concept of organizational assessment is a great tool for objectively observing where a non-profit is and where it might be headed.

Sinats, Kristen. 2001. *Health Co-Operatives: A viable Solution to the Current Crisis in Health Service Delivery*. Victoria, British Columbia: British Columbia Institute of Co-operative Studies.

This paper describes co-operative community models of health care and suggests that they offer a promising solution to the current crisis in Canadian health care system. Such co-operatives could be owned by consumers or workers. The author argues that user-owned health co-operatives could be particularly useful for groups with special needs. She also discusses ways in which these co-operatives could be integrated into the existing health care system.

Sutherland Kate. 2004. *Innovative Co-Ops in the Social Services Sector: A Research Study to benefit People With Developmental Disabilities and Mental Illness*. Co-operative Secretariat, Government of Canada.

This article addresses innovation in providing service to individuals with a developmental disability or mental illness. It details case studies of five social co-operatives and one non-profit organization that provide services to these individual. The author argues that social co-operatives can be effective structures to address the needs and goals of these groups of disabled people. Several conclusions emerge: there is tremendous potential for

community benefit from this innovation; governments focus on non-profit associations to the exclusion of social co-operatives; the potential of the social co-operative is under-realized.

Taylor, M. & J. Lewis. 1997. "Contracting: What Does it Do to Voluntary and Non-profit Organizations?" In Perri 6 and J. Kendall (eds.), The Contract Culture in Public Services. London: Arena.

This contains four studies of nonprofit organizations in London, England where government support is moving away from grants to a culture of contracting. It examines implications for goals, management structure, and the relationship of nonprofits with local governments. This is preliminary work in this area, but it is clear that nonprofits and voluntary organizations feel anxious about contracts. This chapter asks how the change in funding relationship affects the nonprofit organization; are the changes solely as a result of contracting, and how will this 'culture of contracts' impact the sector. The authors conclude that the move to contracting has negative impacts on this sector. These negative impacts include: contracts use more time and resources; those organizations who want to move to contracts must be able to compete; the impact of contracting versus 'grants' in term of government funding; the focus on price per unit of service versus quality of service and its social purpose; winning contracts often means delivering services according to government mandates which may lead to changes in types of services and the clients that they serve. The advantage of grants is that nonprofits identify social needs, whereas, with contracts it is government agendas which identify social needs. Ultimately, the authors argue that the nonprofit/voluntary sector should be 'complementary' to other sectors, but this move toward contracts moves nonprofits from complementary status to alternative in providing services, with government determining the conditions under which the organizations must provide the services.

Tindale, Joseph A. and Erin MacLachlan. 2001. "VON "doing commercial": The Experience of Executive Directors with Related Business Development". In Kathy L. Brock and Keith G. Banting (eds.), The nonprofit Sector and Government in a New Century. Montreal & Kingston: School of Policy Studies, McGill-Queen's University Press.

A comparative case design studying three branches of VON Canada: New Brunswick, Ontario, and Alberta. It examines the challenges facing executive directors as they attempt to transform their agencies to deal with new market realities. In the face of decreasing government revenues, the directors face two choices: to reduce programs or to increase revenues from non-government sources. In this chapter, the VON branches choose to expand to include commercial activities. There are similarities as well as differences within the three branches studies in terms of how the individual directors understand their experiences with commercialization, the impact on staff, problems with public misunderstanding of their non-profit status, the need to be const-effect, and the changes in the programs offered.

Vailancourt, Y. & L. Tremblay (Eds). 2002. Social Economy. Health and Welfare in Four Canadian Provinces. (translated by S.A. Stilitz). Montreal/Halifax: Larepps/Fernwood.

The focus in this publication is the role the social economy has in the provision of health and welfare services in four Canadian provinces. This entails: Quebec (childcare, homecare, and social housing); Ontario (commodification of government policies); Saskatchewan (homecare, food banks, and women's shelters); New Brunswick (environmental and the women's movement). The authors argue that the major crisis in the welfare state represents not only problems, but also opportunities. They acknowledge that each province differs in its context of the social economy. There are separate interests in each province; therefore, while some governments have embraced the social economy, others have distanced themselves from it. Each chapter discusses tensions and co-operation between the different governments (public sector), the market (private sector), and the informal and social economy.

Wall, J., P. Duguay & S. Rohan. 2004. New Synergies: The Co-operative Movement, CED & the Social Economy. *Making Waves*, 15(1):32-36.

The authors demonstrate how co-operatives have remained important in community development initiatives. They also ask where co-operatives fit into the broader context of community economic development. Four case studies provide example of co-operatives in relation to community economic development and the social economy.

Weisbrod, B. A., (Ed). 1998. To Profit or Not to Profit: The Commercial transformation of the Nonprofit Sector. New York: Cambridge University Press.

This book examines the consequences of non-profit organizations shifting from financial dependence on donations to dependence on other forms of revenue. For organizations considering the pursuit of commercial revenue, the following are considered: how does the revenue source affect the organizations behavior; what of the public perception (and of volunteers) that non-profit is actually for-profit in disguise; what is the impact of competition with private enterprises? Chapter highlights:
Chapter 2: competition among non-profits where only non-profits compete
Chapter 4: user fees as a double-edged sword
Chapter 7: why and why not convert from non-profit to for profit (should public money be used for private gain?)
Chapter 8: studies of consumerism in health services
Chapter 10: studies of consumerism in social services

Westlund, Hans. 2003. Form or Content?: On the Concept of Social Economy. *International Journal o Social Economics*, 30 (11): 1192 – 1206.

This paper discusses the concept of social economy. The social economy and the commercial economy are not polar opposites, but exist on a continuum. In this respect, should the social economy be defined from an organizational perspective or from the aims and objectives are also performed in other forms of the economy: commercially-dominated activities contain social elements as ell. The author also provides examples of social economic activities that expand, increase their commercialization, and are transformed into commercial enterprises.

Wilkinson, Paul and Jack Quarter. 1996. <u>Building a Community-Controlled Economy: The Evangeline Co-operative Experience.</u> Toronto: U of T Press.

Following the Antigonish tradition of community development through the co-operative movement, this book examines he success of four co-operatives in the Evangeline region in Prince Edward Island. In a time of globalization and decentralization, Islanders have successfully combined institutional structures with voluntary grassroots action to create an economy and social infrastructure based largely on co-operatives, nonprofits, and small business. The strength of this movement comes from co-operation among co-operatives, and their linking together through a second tier co-operative to pursue development strategies for the entire region. The authors propose a framework of successful community development through co-operatives. Essential elements include: community consciousness (attachment, bonds), empowering activities (promoting self-reliance), and supportive structures (external agencies). This study demonstrates that a small community is viable in a modern economy.

Winkworth, Gail and Peter Camilleri. August 2004. Keeping the Faith: The Impact of Human Services Restructuring on Catholic Social Welfare Services. *Australian Journal of Social Issues,* 39 (3): 315-328.

Church related agencies are major providers of community services in Australia. This paper examines human services restructuring and the impact of the shift to contracting on a human service provider. The responsibility for service provision has shifted away from the government to the non-government sector; including a move away from grants based funding to highly specified contractual arrangements for the delivery of services. Non-profits have responded in diverse ways; however, church related agencies question the extent to which this restructuring threatens the delivery of responsive services.