Director's Report to the Management Advisory Board

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Centre for the Study of Co-operatives

> Lou Hammond Ketilson Director

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March 2007

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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 Saskatchewan
Regional Economic and Co-operative Development
and the University of Saskatchewan, with The CUMIS Group
making an additional contribution.

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

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

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Overview and Highlights

▲ Social Economy Project Update

The main activities since the last director's report have been the first annual Saskatchewan Workshop held in Saskatoon in December and the Winnipeg Regional Symposium in February, which took place concurrently with the first annual Manitoba Workshop and the second annual northern Ontario workshop. See further details in the Conferences section below. Much of the work during these meetings has involved identifying and refining research questions and overall goals, as well as consolidating relationships among researchers and community partners. There are regular conference calls involving our Social Economy node and the Canadian Social Economy Hub and many incidental administrative duties that keep many centre personnel occupied on a regular basis. See faculty and staff individual sections for details about the project and their involvement.

▲ Social Cohesion Project Update

The project officially ended mid-February although two graduate students supported by the project have on-going funding provided by the centre and the university and will remain with us until the summer. Brett is working with Lorraine and Patty on the final budget, administration, and publications. He will be preparing a final report for SSHRC, community partners, the university, and the centre over the next few months.

With the research complete, authors are working on various publications. Cris de Clercy's national survey of attitudes related to social cohesion and co-operatives has also been carried out; results and analysis will soon be available.

The main project publication remaining is the volume co-edited by Brett and Nora, *Imagination, Identity, and Cohesion: Co-operative Community Responses to Globalization in Canada*. Brett continues to work on fine-tuning the chapters prior to handing it over to Nora for editing. Several chapters have been earmarked for French translation for publication in Québec. Nora has a number of research reports and occasional papers related to the project in process and has recently ordered reprints of several items that sold out. Other publications by individual project researchers are anticipated in diverse forums, including peer-reviewed journals in their respective disciplines.

Other Research Update

- A Roger and Jorge Sousa (University of Alberta) have just completed their collection of case studies on co-op conversions, a contract with the Co-operatives Secretariat; the final report went to the secretariat in late February; this will be a full-length book published by the centre
- ▲ Murray is working on a SSHRC project titled "Co-operative Structure, Corporate Governance, and the Failure of Agricultural Co-operatives"
- ▲ he has another SSHRC project titled "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"; Lou, Brett, and Michael are co-applicants
- ▲ there are two other contracts with the Co-operatives Secretariat:

Murray, Kim Sanderson, and Bill Brown are working on "A Co-operative Business Assessment Guide," the objective of which is to provide a detailed description of the co-operative as a business entity

Murray, Rose Olfert, Mark Partridge, and intern Chipo Kangyi are examining Co-ops Secretariat data to identify the impact of co-ops and credit unions on communities

▲ and there are three contracts with CCA, for all of which Lou is principal investigator:

Lou, Roger, Quintin Fox (from CCA), and grad student Juanita Bacsu are preparing a survey of all credit unions and select co-ops in English-speaking Canada to determine the level of support (loans, grants, in-kind, procurement policies) for Social Economy organizations

Kim Sanderson is compiling a collection of resources on value-added, bioresource co-op development

Kim is also doing a collection and analysis of information on opportunities for Canadian producers to become involved in the development of value-added bioresource agricultural co-ops

Student Awards

Zhao Jun was awarded the F.J.H. Fredeen Memorial Scholarship at a special seminar in December 06, when last year's winner, Nancy Allan, gave a presentation titled "Co-ops, Fair Trade, and Communities: Opportunities for International Co-operation," based on the research supported by the scholarship.

Conferences

▲ Saskatchewan Region Social Economy Workshop held in Saskatoon, 5

December 06, and sponsored by CUISR and the centre; the goal was to share with Saskatchewan partners — academic researchers and community partners — the findings of the summer internships and to establish next steps; during

- the course of the workshop we reviewed project goals and engaged project partners in helping to define directions for future research; about thirty-five people were in attendance, including most centre faculty, staff, and students
- ▲ Institute of Co-operative Studies, held in Victoria at the end of January; CCA sponsored on behalf of member organizations to foster, develop, and enhance leadership among senior managers and elected officials across the co-operative and credit union system; Lou was overall facilitator for the institute with Roger assisting with workshops
- ▲ Canadian Conference on Social Enterprise, held in Vancouver in late January; provided an opportunity for those involved in social enterprise to deepen their understanding of the field; share learnings, experiences, and tools; build concrete skills related to social enterprise development; and engage in dialogue about policy and emerging issues affecting the social enterprise sector; Lou and Roger attended
- ▲ Winnipeg Region Social Economy Symposium, 19–20 February; this gathering began Sunday evening with a project management board meeting followed by a keynote address from Brett; the next day, region partners from Saskatchewan, Manitoba, and Ontario posed questions focussed on all five research clusters and then broke into small groups for further discussion, giving practitioners an opportunity to learn and share with each other, and assisting the project overall in identifying common research themes and solutions; the Winnipeg meeting provided an opportunity to strengthen the collaborative engagement between the community and academic partners, and between the clusters and regional research initiatives.

Publications New and Forthcoming

- ▲ The Case of La Coop de solidarité en soins et services de Saint-Camille (Saint-Camille Care and Services Solidarity Co-operative) and Its Impact on Social Cohesion, an occasional paper by Geneviève Langlois and Patrick De Bortoli published in January
- ▲ Social Cohesion through Market Democratization: Alleviating Legitimation Deficits through Co-operation, an occasional paper by grad student Rob Dobrohoczki forthcoming
- ▲ The Social Economy in Quebec: Lessons and Challenges for Internationalizing Co-operation, by Marguerite Mendell, based on her CASC presentation at York University editing complete, with author for approval
- ▲ Consumer Identities and Co-operative Membership, a research report by Social Cohesion summer researcher Colin Leinenweber editing in process
- ▲ Imagination, Identity, and Cohesion: Co-operative Community Responses to Globalization in Canada, centre book based on Social Cohesion research edited by Brett and Nora in process
- ▲ Factors Influencing Demutualizing and Mutualizing: Conversions of the Co-o perative Organizational Form, by Roger and Jorge Sousa centre book; the authors are busy converting it from report form to a publishable manuscript

prior to giving it to Nora for editorial and design work

Staff/Student News

- ▲ summer/fall researcher Dan Macfarlane left us in December after being awarded a four-year fellowship to pursue a PhD in history at the University of Ottawa
- ▲ PhD student Mitch Diamantopoulos has been appointed head of the University of Regina's School of Journalism and Communications, effective summer 07; he will continue with his academic program on a long-distance basis; congratulations Mitch!
- ▲ two of our students, Monica Juarez Adeler and Rob Dobrohoczki, are teaching Business Communications, a first-year class in the College of Commerce; Rob is also teaching a third-year class, Business and Public Policy; and Zhao Jun is teaching a third-year class in Political Studies, The Politics of Poverty

▲ The Seminar Series

- ▲ "Declining Economic Linkage: The Saskatchewan Wheat Pool Share Conversion Story," by Murray Fulton and Kathy Lang, January 07
- ▲ "Imagination and Cohesion: Co-operative Renewal in Canadian Communities," by Brett Fairbairn, February 07
- "Measuring the Brand Equity of the Co-operative Sector: The Credit Union Case," by François Coderre, professor of marketing, University of Sherbrooke, March 07

Partners and Developments

This section highlights relevant issues and developments among centre sponsors. Reports from The CUMIS Group and The Co-operators were unavailable at the time of writing.

Federated Co-operatives Limited (Marilyn McKee reporting)

Federated Co-op had another record year in 2006.

▲ Year-end financial results included sales of \$4.980 billion and savings of \$447.459 million; FCL members were allocated \$357.347 million, with \$338.8 million of that paid in cash; a special cash repayment totaling \$50 million was paid to members on 1 February 07.

Democracy and Governance

- ▲ The FCL board of directors and management met for the annual planning session in mid-January. This exercise is a critical part of our planning process, a time to look to the future, and an opportunity for team building.
- ▲ FCL's annual meeting will take place 5–6 March 07.

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- Delegates are updated on the operations of the co-operative and given opportunities for questions and comments.
- Resolutions will be debated and delegates will be determining a new method of calculating FCL delegate entitlement.
- Retail co-ops will share best practices in the areas of operations and democracy through presentations to the assembly. Many of these presentations include the value of sharing services with neighbouring retails as well as merger success stories.
- Training sessions for delegates will be offered prior to the AGM.

Operations

▲ The refinery component of FCL, Consumers Co-operative Refinery Limited (CCRL) is located in Regina. Over the next five years there will be a multimillion dollar expansion to the complex. This huge investment will create hundreds of jobs during the construction phase and will employ several new professionals after completion. The expansion will greatly increase the refining capacity and enable CCRL to continue to provide product to a growing market.

Environment

▲ FCL is constantly looking for ways to operate in an environmentally friendly way. There are several initiatives within our co-op that work towards a clean future. At the refinery, priorities include the emissions and water quality. Recycling is also a major thrust. In the warehouse area, we are excited about a new initiative that recycles the abundance of plastic stretch wrap used on pallets. This material is being compressed into bales and shipped to a manufacturer of decking material. This is a huge step in the right direction as in Saskatoon warehouse alone more than 60 percent of the product sent to the landfill is stretch wrap.

Concentra Financial (gleaned from the website)

Concentra Financial provides services to more than five hundred credit unions across Canada, with net assets in excess of \$87 billion, twenty-four thousand employees, and five million members in more than a thousand communities.

Concentra is thrilled to announce it was judged one of Canada's fifty best-managed companies for the fourth year in a row. "Out of thousands of applications and a grueling vetting process, Concentra Financial emerged as one of Canada's fifty Best Managed Companies. This company has achieved the highest level of Canadian business excellence," explained James McSherry, executive vice-president and managing director of CIBC Commercial Banking, a national sponsor of the Best Managed program.

Concentra is also pleased to announce the results of a successful 2006, with all

components of the business plan successfully implemented and several other initiatives undertaken that exceeded the original scope of the plan. These included:

- expansion of corporate banking into Alberta and the opening of an office in Calgary
- creation of a new business unit within Concentra called Corporate Development, which has the role of supporting organizational growth and development, and
- ▲ an accelerated review of our Financial Intermediation operations
- ▲ net income for the year was \$11.1 million, with consolidated total assets for year-end 2006 of \$3.3 billion; this is a 17 percent increase over 2005
- ▲ retained earnings experienced an increase of \$3.1 million
- other uses of earnings included a distribution to owners, payment of corporate tax, and provision for employee incentive compensation.

Concentra hosted the 2006 Strategic Financial Management Conference titled "The Next Step: Proactive Approaches to Balance Sheet Management" in Regina in the fall of 06, which attracted about a hundred general managers, CEOs, finance specialists, and accountants from fifty credit unions from across the country. The objective of the conference was to provide attendees with the knowledge and tools to anticipate and take advantage of changes in the environment — that next step from reactive to proactive management.

The 2006 Concentra Financial Credit Union Satisfaction Survey was conducted in November via an e-mail sent to all credit union general managers and CEOs. The objectives of the 2006 survey were to: obtain feedback on quality and client satisfaction; determine satisfaction with products and employees; and measure perceptions of Concentra with regard to innovation, technology, and value. The survey results feed into the Concentra balanced scorecard, which measures company success and helps to guide future direction.

SaskCentral (Karl Baumgardner reporting)

Financial

▲ Financial results met or exceeded targets for 2006, with nonconsolidated net earnings of \$17.9 million, enabling SaskCentral to distribute \$11.882 million as a dividend to members; this represents a \$14.5 percent return on membership share capital.

2006 Developments

▲ Democratic Structure — due to mergers, the system has developed a new democratic structure, with credit unions assigned to North and South districts and aligned in peer groups to facilitate "like-sized" credit union participation in director elections.

- ▲ MLA Contact delegates will contact each MLA regarding key issues around insurance and agriculture.
- ▲ SaskCentral obtained title sponsorship for the International Tattoo and Festival (Regina, May 2007).
- ▲ Innovation officials have implemented a program to enhance SaskCentral's innovation orientation.
- ▲ The company has made good progress with its Aboriginal business and economic development strategies.
- ▲ The organization delivered market intelligence at key points throughout the year rather than through a single annual publication.

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

Lou Hammond Ketilson

▲ Teaching

Lou is not teaching this term but has various responsibilities for a number of graduate students. She is supervisor for Rochelle Smith (PhD Interdisciplinary Studies); a committee member for Kim Brown (MA Political Studies) and Kim Morrison and Monica Juarez Adeler (PhD Interdisciplinary Studies); and committee chair for Kama Soles and Dwayne Pattison (MA Interdisciplinary Studies) and Rob Dobrohoczki, Zhao Jun, and Mitch Diamantopoulos (PhD Interdisciplinary Studies).

Research

Lou is a participant in many research initiatives.

- principal investigator for the centre's Social Economy project, "Linking, Learning, Leveraging," jointly undertaken by the Centre and the Community-University Institute for Social Research in partnership with academics and community partners in Saskatchewan, Manitoba, and northern Ontario
- ▲ co-applicant for "Tracking Quality of Life in Saskatoon"; the survey has just been completed; Lou is responsible for writing two articles, one on the quality of life of Aboriginal peoples and another on the quality of life of women

- ▲ member of the CIRIEC-International-sponsored Scientific Commission on the Social and Co-operative Economy working group for a project titled "Methods and Indicators for Evaluating the Social and Co-operative Economy." The group has just completed a draft report, *Système de classification économique des organisations d'économie sociale* (Economic Classification System of Social Economy Organizations), and a research assistant is currently gathering information on evaluation strategies used by social economy actors in Canada outside of Québec.
- ▲ co-coordinator of the Aboriginal Cluster of the Social Cohesion project; in process of preparing final report on research in northern communities
- A member of the Strategic Research Network on Social Innovation led by Denis Harrisson at the Centre de recherche sur les innovations sociales at the University of Quebec at Montreal. The purpose of the network is to develop knowledge on a selected theme; themes include association, network, creativity, social innovation, civil society, institution, and social economy. The network will bring together the main actors across Canada in this field of research, with the objective of encouraging a shift in Canadian research towards international connections and fostering interactions and synergies that will facilitate the creation and application of new knowledge. The challenge consists of creating a new "intellectual space." The first meeting is scheduled for 18 April.
- ▲ co-applicant with Jean Marc Fontan, Université du Québec à Montréal, in a SSHRC application for a grant aimed at creating an interuniversity research network devoted to the social economy and social innovation
- ▲ co-applicant in Murray's SSHRC-funded "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"
- ▲ continued involvement with the Saskatchewan First Nations Wholesale Cooperative, writing a case study and overseeing the production of a tool-kit for Aboriginal co-op development; she is a partner in this Co-operative Development Initiative (CDI) project
- also working with the FSIN's First Nations Agriculture Council to develop agricultural co-ops in Saskatchewan First Nations communities, and overseeing the production of a tool-kit to support First Nations agricultural co-op development; she is a partner in their second CDI application

Publications

- ▲ with Isobel Findlay, co-editing a special edition of *Économie et Solidarité*, the CIRIEC-Canada Journal, forthcoming 2008; also contributing an article on Pond Inlet
- ▲ in process: three case studies on the two CDI projects mentioned above, and the Pond Inlet study for the Social Cohesion project
- ▲ "First Nations Co-operatives in Canada: (Re)inventing Appropriate Forms of

Enterprise," chapter in forthcoming centre book *Imagination, Identity, and Cohesion*

- ▲ two papers in progress: one on the methodological issues of mapping the social economy in the northern Ontario, Manitoba, and Saskatchewan node of the Social Economy project; and another on the methodological issues of measuring the social economy in the same region
- with Gayle Broad, a paper on "Mapping the Social Economy in Aboriginal Communities in Canada" for the book to be published by CIRIEC's Scientific Commission on the Social and Co-operative Economy working group, Methods and Indicators for Evaluating the Social and Co-operative Economy

Presentations

- ▲ "Overview of the First Year's Activities of the Northern Ontario, Manitoba, Saskatchewan Social Economy Node," to community and academic partners, Linking Learning, Leveraging Saskatchewan symposium, Saskatoon, 5 December 06
- ▲ "Aboriginal Economic Development: Past Successes and New Forms of Cooperative Enterprise," to Excellence in Action, the national conference on Best Practices in First Nation, Metis, and Inuit Economic Development, Saskatoon, 24 January 07
- ▲ With Lorraine, a presentation on the centre to members of the Co-operative Network Luncheon, 16 February 07
- ▲ Collaborated with business school colleagues at York and Laval to submit a panel proposal on "Raising the Profile of Nonprofits, Co-ops and Social Enterprise as Legitimate Organizations for Management Research and Teaching" to Administrative Sciences Association of Canada annual meetings to be held in Ottawa, June 07
- ▲ Collaborated with Gayle Broad for paper proposal titled "Mapping the Social Economy in Aboriginal Communities in Canada" to be presented to the First World CIRIEC Research Conference on the Social Economy, Building and Strengthening Communities: The Social Economy in a Changing World, 22–25 October 07

Conferences/AGMs

Lou regularly attends meetings on the centre's behalf. This quarter included the Canadian Conference on Social Enterprise in Vancouver, 28–30 January.

Outreach and Engagement

Lou was a presenter and lead facilitator for the CCA-sponsored 2007 Institute of Co-operative Studies in Victoria at the end of January, collaborating with CCA staff member Quintin Fox in designing the event. Fifty-six senior managers and

elected officials from co-operatives and credit unions across Canada participated.

Administration

Specific to the Centre

- chaired two student advisory committee meetings and one comprehensive exam for concentration students
- organized centre's strategic planning retreat
- ▲ since January 05, member of the university's Advisory Committee on Areas of Research, Scholarly, and Artistic Pre-eminence, which is drafting a foundational document for the university; participated in many meetings; final draft pending
- ▲ vice-chair of the ICA Research Committee, which will be holding an International Researchers' Forum in Saskatoon in May 07 in conjunction with the hundredth anniversary of the university and the annual meetings of the Congress of the Humanities and Social Sciences
- ▲ since May 06, member of the university's Task Force on the Management of Centres, which is considering all matters related to the management of research centres and institutes on campus and preparing draft recommendations to be approved by University Council; participated in several meetings to review drafts of report

Research Administration re the Social Economy Project

Update on regional node activities:

- ▲ December provincial workshop for the project held in Saskatoon; outcome was call for research proposals
- ▲ February regional symposium held in Winnipeg; Lou assisted in organizing, presented to, and facilitated this two-day event; she also attended the provincial workshops for Manitoba and northern Ontario held at the same time
- ▲ March met to review provincial proposals, seven will be funded
- participated in the conference calls and meetings organized by the National Hub and other associated committees and adhoc groups; since December first, she has participated in a national facilitating committee conference call on Mapping the Social economy and in the monthly conference calls for the national hub

Brett Fairbairn

▲ Teaching

Brett continues to be on administrative leave and although he is not teaching undergraduates, he has ongoing responsibilities for graduate students. He is cur-

rently supervising or co-supervising three PhD students and one MA student. MA student Tom Novosel finishing his thesis on the efforts of the CCF government (1944–64) to develop a pulp mill in Prince Albert. Interdisciplinary PhD student Warren Weir, who is working on co-op models for Aboriginal business, is preparing for his comprehensives. Brett's newest PhD student, Mark McCulloch, is studying consumer co-operatives in Communist East Germany; he is currently working on a comprehensive field in Modern European History and on German language under Brett's direction.

Brett is also a member of eight other thesis advisory committees.

▲ Co-operative Research

Brett has been working on the wrap-up of the Social Cohesion project, including with Lorraine and Patty on budget questions (the SSHRC funds have now all been spent) and with Nora on the planned capstone book. Brett and Nora have refined the concept and table of contents for the book and Brett is working on several chapters.

Another focus has been the Governance Cluster of the Social Economy project. Brett has tentatively identified a community co-leader for the cluster; subject to practical arrangements, this will be Quintin Fox, manager of Member Services for CCA in Ottawa. Brett led a number of discussions at the regional symposium in Winnipeg, 18–20 February 07, out of which it has emerged that the main project of the cluster will probably be a toolkit for governance in the social economy and social enterprises. Based on the interests expressed by community partners in Winnipeg, Brett and Quintin will be working during the coming months to plan research to develop pieces for this toolkit.

▲ Other Research

Co-investigator, SSHRC Knowledge Impact in Society program, "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"; principal investigator is Murray Fulton

Co-investigator, SSHRC Strategic Research Network program, "Strategic Research Network on Social Innovation, the Social Economy, and Civil Society"; principal investigator is Denis Harrisson of UQAM

Presentations

"A Primer on Co-operatives and Social Enterprises in a New Political Climate," keynote plenary address to three conferences on "Community Revitalization: Co-ops and Other Social Enterprises," Saskatoon, 20 November 06, Edmonton, 21

November 06, and Whitehorse, 23 November 06

"Imagination and Cohesion: Co-operative Renewal in Canadian Communities," Centre Seminar Series, 1 February 2007

"What's in a Name? Revitalizing Communities: Social Enterprises in a New Political Climate," keynote plenary address to Linking, Learning, Leveraging: Regional Symposium of the Northern Ontario, Manitoba, and Saskatchewan Regional Node, Winnipeg, 18 February 07

Publications

"Economic and Social Developments," in *The Short Oxford History of Germany: Germany 1871–1918*, ed. James Retallack. Oxford: Oxford University Press (peer reviewed), forthcoming

"A Shift in Values: Credit Union Expansion by Conversion of Bank Branches," ed. Roger Herman and Jorge Sousa. Research report to Co-operatives Secretariat, Government of Canada, forthcoming

"From Farm to Community: Co-operatives in Alberta and Saskatchewan, 1905–2005," in *The Prairie West as Promised Land*, ed. Doug Francis and Chris Kitzan. Ottawa: Canadian Museum of Civilization (peer-reviewed), forthcoming

"'Canada's Co-operative Province': Individualism and Mutualism in a Settler Society, 1905–2005," *Perspectives of Saskatchewan: 1905–2005*, ed. Jene Porter. Toronto: University of Toronto Press (peer-reviewed), forthcoming

Review of Cornelius Torp, *Die Herausforderung der Globalisierung: Wirtschaft und Politik in Deutschland 1860–1914* (Göttingen: Vandenhoeck & Ruprecht, 2005), American Historical Review, forthcoming

▲ Outreach and Engagement

Brett is a member of CCA's Committee on Good Governance, 06–07, a committee established this past year with a mandate to (a) develop an index of good governance in co-operatives, and (b) develop a program of governance awards for co-operatives. Brett's participation is connected with his work as co-lead of the Governance Cluster of the Social Economy project.

Murray Fulton

▲ Teaching

Agricultural Economics 842.3: Agricultural Market Organizations Economics 898.3: Special Topics Class in the Economics of Co-operatives

Murray is supervising six MA and PhD students working on co-operative topics and is a committee member for a number of others. One of his students, Kathy Lang, successfully defended her MSc thesis in November titled "Cognition, Agency Theory and Organizational Failure: A Saskatchewan Wheat Pool Case Study." His PhD student Lampros Laprinakis is working on three papers: one on the impact of Saputo's acquisition of Dairyworld; another on the role of cognitive dissonance in determining member commitment to co-operatives; and a third on the impact of decision framing on the strategic decisions taken by co-operatives.

Research

Murray has a great number of research projects underway:

- "Co-operative Structure, Corporate Governance, and the Failure of Agricultural Co-operatives," funded by SSHRC
- SSHRC-funded Knowledge Impact in Society project "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"
- ▲ With Kim Sanderson and Bill Brown, "Co-operative Business Assessment Guide," funded by Agriculture and Agri-Food Canada; objective of the work is to provide a detailed description of the co-operative as a business entity
- ▲ With Rose Olfert and Mark Partridge, examining the role of co-operatives in Canada as a factor in population growth; funding from the Co-operatives Secretariat; research is part of the Social Economy project
- ▲ "Evaluation of Market Opportunities and Supply Chain Structure for Biocontrol Products in Canada," examining the role of co-operatives in providing co-ordination in this particular supply chain
- Project examining the role of producer associations in innovation activity as part of the Canadian Agricultural Innovation Research Network
- "Transformative Change in Biosphere Greenhouse Gas Management," SSHRC funded
- The China Project, CIDA funded; Murray and Bill Turner were in China from 9–18 December 06 acting as consultants and engaging in some of the training courses in the Farmer Association Training Program

Presentations

"Co-operative Adaptation and Change" to the International Conference on Promoting the Development of Farmer Co-operative Economic Organizations in China, Beijing, December 06

With Kathy Lang, "Agency and Declining Economic Linkage: The Saskatchewan

Wheat Pool Share Conversion Story" to the Centre Seminar Series, January 07

"Agency and Declining Economic Linkage: The Saskatchewan Wheat Pool Share Conversion Story" to the Food and Resource Group's seminar series at UBC, February 07

Administration, Outreach and Engagement

Murray is a member of the Interdisciplinary Committee of the College of Graduate Studies and Research, and as the lead person on the committee investigating the establishment of a School of Public Policy on campus, is putting the final touches on the proposal for the school and the accompanying Master of Public Policy.

Murray also wrote an information piece for Agricultre and Agri-Food Canada's plebiscite on the role of the Canadian Wheat Board in barley marketing.

Michael Gertler

▲ Teaching

Michael is not teaching this semester, although he continues his supervisory role with six MA students (four in sociology and two in co-op studies) and is a member of four interdisciplinary PhD advisory committees, three of which are in co-operative studies.

▲ Research

Co-investigator for the centre's SSHRC-funded "Co-operative Membership and Globalization"; continues to analyse the field research in connection with cluster two, Co-operative Membership and Changing Boundaries of Community

Co-investigator with sector partner the Saskatoon Co-operative Association on SSHRC-funded "Thought for Food: Essential Skills and Food System Performance"

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"

Publications

Review of Michael Mayerfeld Bell, Susan Jarnagin, Gregory Peter, and Donna Bauer, Farming for Us All: Practical Agriculture and the Cultivation of Sustainability (University Park: Pennsylvania State University Press, 2004), forthcoming in Renewable Agriculture and Food Systems

With Roger Herman and Dwayne Pattison, "Revealing Relationships: Co-operatives, Communities, and Sustainable Development in a Northern Prairie Region," in process for forthcoming centre book *Imagination, Identity, and Cohesion*

Presentations and Conferences

With Nancy Allan, "Remaking the Links: Fair Trade for Local and Global Community Development," CUISR Brown Bag Luncheon presentation, 18 January 07, Saskatoon

With Lorraine, represented the Social Economy project at the Quebec Social Economy Summit in Montreal, 16–17 November 06

Participated in Saskatchewan Region Social Economy Workshop as discussion group facilitator, Saskatoon, 5 December 06

Participated in Winnipeg Region Social Economy Symposium, 18-20 February 07

▲ Administration/Outreach and Engagement

Michael is academic co-lead of the Community Economic Development Module, Community-University Institute for Social Research (CUISR) and also a CUISR board member. He is past president of the Canadian Association for Studies in Co-operation; a member of the Administrative Committee, Regional and Urban Development, and of the Equity Committee in the College of Arts and Science; a member of the Undergraduate Studies Committee and the Library Committee and chair of the Employment and Education Equity Committee in the Department of Sociology; and a member of the Local Arrangements Committee, Canadian Association for Food Studies, Congress of the Humanities and Social Sciences, Saskatoon.

Michael has also recently become a member of the editorial board for the *Journal* of *Cooperatives*

Nora Russell

Nora set some kind of record in January, sending a total of eleven projects to the printer, including new publications, reprints, a newsletter, the annual report, and

redesigned covers for centre booklets.

Large Projects

- ▲ preparation of many materials for 5 December Social Economy workshop in Saskatoon, including redesign of cover and interior of the SSHRC application; print supervision; assisting Maria at CUISR with the development of a poster template; preparation of PowerPoint presentations; also participated in the workshop as a discussion group facilitator
- design, layout, and print supervision for centre's new newsletter to the sector; distributed in early January to excellent reviews
- writing, design, layout, and print supervision of the annual report, which has a new format this year reflecting the goals of the centre's Strategic Plan and the university's foundational document *Renewing the Dream*
- ▲ The Case of La Coop de solidarité en soins et services de Saint-Camille (The Saint-Camille Care and Services Solidarity Co-operative) and Its Impact on Social Cohesion (occasional paper) Geneviève Langlois and Patrick De Bortoli, published in January 07; sent for reprint the same week it was delivered as it immediately sold out
- ▲ Social Cohesion through Market Democratization: Alleviating Legitimation Deficits through Co-operation (occasional paper) Rob Dobrohoczki; edited paper returned from author; awaiting Nora's attention to deal with many changes, layout, and printing
- ▲ Consumer Identities and Co-operative Membership, research report by summer researcher Colin Leinenweber; editing in process
- ▲ The Social Economy in Quebec: Lessons and Challenges for Internationalizing Cooperation (booklet based on CASC presentation) Marguerite Mendell; editing complete and with author for approval
- ▲ dealt with issues and prepared materials connected with the conversion of ISBNs (International Standard Book Numbers) on centre publications from 10-digit to the new 13-digit format, which began in January; converted one hundred existing ISBNs to new format
- organization, writing, and layout for this director's report

Small Projects

- supervised the production of the French version of the centre's banner stand
- ▲ translated some French materials for Lou
- ▲ prepared bios, blurbs, and did translations for ads for our two keynote speakers at the CASC/ACE/ICA conference in May
- prepared ads for the seminar series
- ▲ redesigned covers for centre booklet series; supervised printing and production; covers are printed separately and ordered in bulk to save costs

- updated Lou's CV
- prepared materials for submission to CIP office to obtain Library and Archives Canada Cataloguing in Publication data for several publications
- ▲ edited advisory board minutes for Patty
- prepared powerpoint presentations for Lou and Lorraine for Co-op Luncheon presentation
- entered changes from the proofreader, reformatted document, and did some preliminary editorial work on Roger and Jorge Sousa's report on co-operative conversions prior to sending it to the Co-operatives Secretariat

Reprints

- ▲ Revisiting the Role of Co-op Values and Principles: Do They Act to Include or Exclude? (booklet) Lou Hammond Ketilson
- ▲ The Case of La Coop de solidarité en soins et services de Saint-Camille (The Saint-Camille Care and Services Solidarity Co-operative) and Its Impact on Social Cohesion (occasional paper) Geneviève Langlois and Patrick De Bortoli
- ▲ *Up a Creek* with a Paddle: Excellence in the Boardroom (booklet) Anne Hoyt
- ▲ Co-operative Heritage: Where We've Come From (booklet) Brett Fairbairn
- ▲ Cognitive Processes and Co-operative Business Strategies (booklet) Murray Fulton and Julie Gibbings
- ▲ Proceedings from the Women in Co-operatives Forum (conference proceedings)
- ▲ New Generation Co-operatives: Rebuilding Rural Economies (booklet) Brenda Stefanson, Murray Fulton, and Andrea Harris
- ▲ centre booklet covers

Other

Nora is on the executive of the Saskatoon branch of the Editors' Association of Canada and is currently co-organizing a spring workshop on the production process in the publishing industry.

Nora is also a member of the Saskatchewan Publishers Group. A new initiative at SPG is the online bookstore, which features a number of centre publications. Centre books also appear in *PaperCuts*, the SPG's distribution catalogue, which takes news of centre books into schools, libraries, and universities all over Canada, as well as to government offices, elected officials, tourist destinations, and other venues throughout Saskatchewan.

Roger Herman

Roger's responsibilities are many and varied.

▲ He is a member of the Finance Cluster of the Social Economy project and is

- conducting research on the social economy with Lou and Juanita, and in conjunction with the Canadian Co-operative Association, regarding levels of support provided to social enterprises by Canadian credit unions. The survey instrument is complete and will be ready to launch in the coming weeks.
- A He continues to devote a portion of his time to research activities for the Co-op Membership and Changing Boundaries of Community cluster of the Social Cohesion project. Together with Michael Gertler and Dwayne Pattison, he is preparing a chapter for the forthcoming centre book *Imagination, Identity, and Cohesion.*
- ▲ His work with Jorge Sousa (University of Alberta) on co-operative conversions, undertaken on contract with the Co-operatives Secretariat, is complete; the final report went to the secretarit in late February. Intended for academics, policy makers, and co-op practitioners, the research findings include twelve case studies of organizations that have either converted from co-ops (demutualized) or converted into co-operatives. This research will be adapted for a centre-published book on the topic.
- ▲ He is co-ordinating a conference hosted by the centre 28 May − 1 June 07, which will be held in conjuction with Congress 2007, the annual conference of the Canadian Federation for the Humanities and Social Sciences. Titled Cooperative Innovation: Influencing the Social Economy, it is a joint gathering of the Canadian Association for Studies in Co-operation, the International Cooperative Alliance Research Committee, and the Association of Co-operative Educators.
- ▲ He and Lou are on the university's Congress 2007 planning committee. This event will welcome approximately five thousand participants to the University of Saskatchewan over a two-week period this spring. One of the three designated theme days has been assigned to the topic of the Social Economy.
- A He co-ordinated the centre's successful application for funding from the Agriculture Development Initiative for two projects. The first will research opportunities for Canadian producers to become involved in the development of value-added, bioresource, agricultural co-operatives. The second will involve collecting and reviewing materials for developing value-added, bioresource co-operatives.
- He is responsible for co-ordinating visiting scholars at the centre, managing the centre's seminar series, and liaising with the centre's graduate students. Visitors this quarter included a delegation from South Africa interested in co-operatives and specifically in the centre (8 December), and a Ukrainian agricultural economist with the same agenda (19 December).
- ▲ He continues to respond to inquiries regarding New Generation Co-operatives as well as co-ops in general.
- ▲ He is a board member for the Saskatoon Community Clinic, sitting on the Operations Committee and chairing an ad hoc committee developing policy to deal with complaints against clinic physicians

▲ He is vice-president of the board of the Association of Cooperative Educators (ACE).

Roger has participated in a number of conferences over the past few months:

- the Social Economy symposium held in Saskatoon, 4-5 December
- the Enterprising Non-Profits conference in Vancouver, 28–30 January
- the CCA Co-operatives Institute in Victoria, 30 January 1 February, where he facilitated group discussions
- the Social Economy symposium held in Winnipeg, 18–20 February

Roger is the centre's representative on a number of organizations:

- ▲ an advisory committee of the Community Development Society of Saskatchewan planning an international community development conference for Saskatoon in 2008
- a committee of community economic development organizations developing a Saskatchewan regional CED umbrella organization
- a national Social Economy discussion group facilitated by the Canadian Cooperative Association
- ▲ the Saskatchewan Council for Community Development

Lorraine Salt

SSHRC Project Administration

Lorraine attended the Canadian Social Economy Hub's management board meeting in Montreal in November, a three-day meeting that coincided with the tenth anniversary celebration of the Quebec social economy, Le Sommet de l'économie sociale. The Sommet was a two-day working meeting of seven hundred representatives from social economy organizations in Quebec, culminating in an exhibition of social economy organization products. Lorraine participates in the CSE Hub's monthly conference calls.

In December 06 she helped organize the Social Economy project's annual Saskatchewan workshop, monitoring registrations, arranging for note takers, and co-ordinating content for the poster session prepared by Maria Basualdo at CUISR.

Lorraine also assisted with the organization of the Winnipeg Symposium in February 07, a meeting of project representatives from across the region. She collected registrations, arranged note takers, and booked a French interpreter. She also invited poster content for a wonderful display produced once again by Maria. There are now eighteen posters representing almost all of the individual projects being undertaken by partners across our region. Lorraine made a presentation at

this event on how to use the online discussion forum on the project's website.

February 14, 2007, was the end date for the SSHRC-funded Social Cohesion project under principal investigator Brett Fairbairn. This represents the culmination of five years of research. With Patty's help, we have wound down the project accounts. Lorraine and Brett will complete the final report on the project over the next few months.

In February, Lorraine prepared and submitted three grant applications to USTEP (University of Saskatchewan Summer Student Employment Program) for a diverse set of projects for summer students.

Lorraine and Lou are now working on the SSHRC Milestone Report for the Social Economy project, a document detailing our commitments to the end of the project term.

▲ The Websites

The project website continues to grow, with Lorraine making regular additions to the resources page. Updates continue on all websites.

Luke Sather, our contracted web developer, is busy behind the scenes converting the centre's main website to the open-source Drupal content management product. A new website design is also in the works. This is a painstaking process, and the results will not be seen until Luke moves the completed site over to the public pages. As well as getting a new look, the revamped website will make updates easier without the use of costly software. Luke also took new photographs of centre faculty and staff, which can now be seen on our website.

The Library

We are awaiting the latest database upgrade from LibraryWorld so we can update the online catalogue. With Karen's assistance as she learns the formal art of cataloguing, the most recent centre purchases will soon be added to the database. Collection development is ongoing.

Lorraine is planning a social economy pathfinder to enable our project researchers to quickly find project-related materials.

Lorraine continues to enjoy her role as reference librarian and researcher, answering questions from the centre's faculty, scholars, staff, graduate students, campus students, and outside parties.

Professional

Lorraine is the centre's representative to the Co-operative Network of Saskatoon. At the February lunch, Lorraine and Lou made a presentation to the network on the centre's work and its library, reminding the sector that the library is available to them. Lorraine was also involved in planning an upcoming Co-op Week Luncheon with Quebec researcher François Coderre, who will be presenting in the Centre Seminar Series in March.

Lorraine is now chair of the Saskatchewan Library Association (SLA) Advocacy Committee and is co-ordinating the committee's production of a series of briefing papers on issues of significance to Saskatchewan librarians, updating the advocacy pages on the SLA website, and responding to a couple of recent government letters relating to library matters. Lorraine is also co-chair of the SLA Conference 2007 Social Committee and a member of the Program Committee. In addition, she is a participant in the local Special Libraries Network.

Patty Scheidl

As office manager, Patty is responsible for the centre's day-to-day operations and undertakes many additional duties as they arise. Much of her time is spent maintaining the centre's monthly financial statements as well as the two SSHRC project accounts and other research accounts. This involves ensuring that all the supporting documentation is in the files and contacting the Central Registry to obtain the appropriate paperwork if it is missing. Other financial activities include 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 for purchases and payments; and investigating errors.

Special financial responsibilities this quarter included:

- ▲ preparing and sending out the quarterly invoices to the sponsors; completing the cash report forms and making deposits upon receipt of the dues
- working with Paul Stevens at the conclusion of the Mongolian Project reviewing and processing outstanding expenses and preparing journal vouchers for incorrect charges
- preparing many journal vouchers in connection with Murray and Bill Turner's trip to China in December in order to reimburse the centre for expenses initially processed through another account while we awaited the creation of the China Project account
- working closely with Barb Geib, our financial analyst, with regard to the closure of Brett's Social Cohesion project account; this involved monitoring the balance and ensuring that all associated expenditures were processed prior to the project's end date, including two very large transactions (one with

Environics, a company that did a survey on behalf of the Centre, the other, Nora's time on project-related publications)

- ▲ dealing with several expenditures processed in error through two of our research accounts, which required many telephone calls and e-mails to the Payroll Department and Payment Services before it was finally sorted out
- ▲ making the financial arrangements for the visit of Men Wei, a member of the Agricultural Commission, National Peoples' Congress of China, who made a presentation in the Centre's Seminar Series
- ▲ dealing with monthly payroll accounts for contract workers Dan Macfarlane, Juanita Bacsu, and Luke Sather
- dealing with the College of Graduate Studies and Students Accounts in connection with a missing payment on the Fredeen Scholarship awarded to Zhao Jun

Patty is responsible for organizing the Management Advisory Board meetings. This includes the many hours that go into co-ordinating a suitable date, preparing the minutes and other materials, assembling the board packages and couriering them out ahead of time, getting parking passes, booking rooms, and ordering lunch. Arrangements this time were complicated by the centre's retreat, being held in conjuction with the board meeting and involving board members and scholars as well as centre faculty and staff. Co-ordinating the date, investigating suitable off-campus venues, and making the catering and billing arrangements occupied hours of Patty's time, not to mention patience.

Patty also co-ordinated several other meetings this quarter:

- with Luke, Lorraine, and Lou to discuss the centre's website
- with Brett, Lou, Lorraine, and herself to discuss the closure of the Social Cohesion project account and the use of the remaining funds
- ▲ with Paul Stevens, Lou, and herself to discuss the closure of the Mongolia Project account
- a number of meetings with Lou and the deans of colleges connected with the centre to discuss strategic planning around bridging positions

Patty has many responsibilities involving centre students. This quarter she went to considerable trouble researching and obtaining ergonomically correct chairs for their work stations, only to be told they would have to be returned because they did not come from a designated university supplier. Going through the process a second time, she endured a frustrating and ultimately unsatisfactory exchange with Facilities Management in an attempt to obtain top-up funding to cover the cost difference between the original and the newer, more expensive, chairs.

Incidental responsibilities this past few months have included assisting with sending out Seminar Series announcements; arranging for computer support for a MARCH 2007

number of people; assisting Roger and the Office of Research Services in creating two new contracts with the Canadian Co-operative Association; and co-ordinating the arrangements for Zhao Jun's comprehensive exam in January.

Both Patty and Karen spend a great deal of time helping both Lou and Lorraine with various administrative tasks associated with the Social Cohesion and Social Economy projects.

Karen Neufeldt

Karen's regular duties include reception, paperwork, cash reports, filing, xeroxing and printing, invoicing and mailing publication orders, keeping track of stock for reprints, as well as invoicing telephone, fax, and xerox bills. She is also responsible for sending out the seminar series announcements and periodic newsletters, updating various databases, whatever other mailouts are required, and helping to prepare packages for the advisory board meeting.

Other special activities this quarter include:

- transcribing the minutes of the November advisory board meeting
- assisting Patty with cheque requisitions, cash reports, and deposits
- assisting Maria Basualdo from CUISR with name tags and registration for the 5 December Social Economy workshop
- booking flights and accommodations for Lou and Roger to attend the Social Enterprise conference in Vancouver and the Co-op Institute in Victoria in January
- booking flights and accommodations for seven centre people to attend the Social Economy Regional Symposium in Winnipeg in February; also assisted with registration by co-ordinating and faxing completed forms to the Winnipeg Inner-City Research Alliance, who hosted the event
- completing and submitting many travel expense claims for staff
- co-ordinating the mail-out of the new newsletter to the sector and the annual report in January and February
- co-ordinating room arrangements, printing, and mail-out of announcements for centre seminars
- assisting Lorraine with cataloguing information sheets and data input of catalogue records; sorting and preparing a list of books from the Federated Cooperatives donation for the main library's head of Research Services, who many want some of the books for her collection; assisting with circulation, routing journals, shelving returns, etc., as well as helping patrons when Lorraine is
- co-ordinating conference calls for both the Social Economy project and the

Congress committee meetings

▲ sending several new centre publications for legal deposit

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

The Students

Angie Wagner is in Ghana on a CCA internship as a reproductive health officer, collecting baseline data on rural male and female artisans.

Jason Heit is working on his MA thesis. The paper he wrote on website design and quality in selected co-operative organizations awaits Nora's attention for editing. It will be a research report arising from the Social Cohesion project.

Kim Brown is also working on her MA thesis. She is currently in Kenya on a CCA internship working for the Swedish Co-operative Centre on a project targeting agricultural co-operatives and producer groups, addressing issues of poverty and social injustice.

Monica Juarez Adeler is in the third year of her interdisciplinary PhD. Having finished her course work and her comprehensive exams, Monica is preparing the formal proposal for her dissertation. She is also a teaching assistant in the College of Commerce, and over the past few months has participated in centre-related conferences, symposiums, and workshops in Saskatoon, Vancouver, and Winnipeg.

Rob Dobrohoczki has finished the course work for his PhD and is studying for his comprehensives. He is also working part time as a teaching assistant in the College of Commerce. His article "Co-operatives as Social Policy Means for Creating Social Cohesion in Communities" was recently published in the *Journal of Rural Co-operation*. And he has two other publications forthcoming, one a chapter co-authored with Brett Fairbairn in the forthcoming centre book, *Imagination, Identity, and Cohesion*, the other a centre occasional paper titled *Social Cohesion through Market Democratisation: Alleviating Legitimation Deficits through Co-operation*. Rob made a presentation at the Saskatchewan Region Social Economy Workshop in Saskatoon in December 06.

Zhao Jun was awarded the F.J.H. Fredeen Memorial Scholarship in December 06 and successfully completed the comprehensive exams for his PhD studies in January 07. Other activities include:

▲ co-author with Dr. Achim Fock, senior economist with the World Bank, of "Farmer-Controlled Organizations in China: Pushed Forward or Taking Off? An Assessment Against International Experience," presented at the International Conference on Farmers' Professional Co-operative Development in Beijing in late fall 06

- co-author with Dr. Achim Fock and Ms. Zhang Lanying, Country Director of Actionaid International, of "Development of China's Farmers' Associations: Review and Recommendations," in Chinese. This will be published in the journal China Development Brief
- for the World Bank, he translated "China's Farmers' Professional Co-operative Law" into English

Dwayne Pattison is nearing the end of the second year of his Interdisciplinary MA program and is working on the literature review for his thesis. He is preparing to conduct interviews and collect data on the regionalization of consumer co-operatives in northcentral Saskatchewan under Michael's direction. And with other centre graduate students, Dwayne took part in the December Saskatchewan Region Social Economy Workshop.

Rochelle Smith is working on her PhD dissertation titled "The Relationship of Saskatchewan's Co-operative Community Clinics with the Government of Saskatchewan: Toward a New Understanding." She hopes to complete it in the spring.

Mitch Diamantopoulos is working on the final class for his PhD program. He is also engaged in quite a few other activites:

- ▲ with Rob Dobrohoczki, he made a presentation at the Saskatchewan Region Social Economy Workshop in December
- ▲ he wrote a chapter titled "Re-inventing 'Home' in a Placeless World: Globalization, Social Exclusion and Co-operative Housing Innovations in Canada" for the forthcoming centre book *Imagination*, *Identity*, and *Cohesion*
- ▲ he is finalizing the case study of core neighbourhoods "Growing Pains: Social Enterprise in Saskatoon's Core Neighbourhoods" — for the Social Economy project
- ▲ he has filed abstracts for a number of conference papers for the upcoming CASC meetings in Saskatoon as well as for a conference at the Centre de recherche sur les innovations sociales in Quebec and the Canadian Communication Association conference in Saskatoon
- he has organized this semester's Centre Seminar Series
- he has been appointed to the new Saskatchewan Labour Market Commission to represent the social economy sector, which may be the first time the social economy has been officially recognized at the provincial level as a distinct sector
- finally, he has accepted an appointment as head of the University of Regina's School of Journalism and Communications, effective this summer, and will be

moving with his family to Regina

Juanita Bacsu continues to work on her MA thesis, which is examining citizens' attitudes toward globalization and is based on the Social Cohesion project. She has just completed a survey instrument that examines credit union support for cooperative and social enterprise development; the survey is in the process of being implemented. Juanita was also a participant in the Saskatchewan Region Social Economy Workshop in December.

Dan Macfarlane concluded his work on the co-operative oral/video history featuring individuals who have made significant contributions to the co-op community in Saskatchewan. The interviews are available on dvd from the centre's library. Dan left the centre in December after being awarded a four-year fellowship to pursue a PhD in history at the University of Ottawa.

Mike Chartier is engaged in preparing the proposal for his MA. His thesis topic is the radical communitarian pedagogy of Watson Thomson, a controversial figure in Saskatchewan educational and co-operative history. Mike is also working on a historical overview of Saskatchewan co-operative development policy for the centre. In addition, over the past few months, he has written several proposals for conferences and an application for a CUISR summer internship.

Kama Soles is the most recent addition to the Co-op Concentration program. Her MA thesis will examine co-operative housing models for the disabled community.