



Canadian Journal of Nonprofit and Social Economy Research
Revue canadienne de recherche sur les OBSL et l'économie sociale

Professionalism, Variety, and Knowledge Production in the Social Economy: Keynote Address to the 2019 Association for Nonprofit and Social Economy Conference

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ABSTRACT

This keynote address explores the interplay between three forces that will shape the next few years of social economy practice and research. The first is variety, both with respect to existing and emergent social need, and with respect to the multiplicity of organizational forms adopted by social economy actors. The second concerns the forms of knowledge, ranging from instrumental knowledge to reflection and critique, which inform practices in the sector. Knowledge production is itself both enabled and constrained by the third force, professionalism, or the ways we structure the socialization and employment of those working in the sector. With variation an inherent characteristic of the social economy and with the ongoing search for appropriate models of professionalism, our collective knowledge production tasks remain unfinished.

RÉSUMÉ

Ce discours principal explore les interactions entre trois forces qui vont façonner la pratique et la recherche en économie sociale au cours des prochaines années. La première est la variété, tant par rapport aux besoins sociaux actuels et naissants qu'à la multiplicité de formes organisationnelles adoptées par les acteurs de l'économie sociale. La seconde concerne les types de savoir informant les pratiques dans le secteur, du savoir instrumental jusqu'à la réflexion et la critique. La troisième force, le professionnalisme ou la manière dont on organise le recrutement et la socialisation de ceux et celles qui œuvrent dans le secteur, permet la production du savoir tout en y imposant certaines contraintes. La variation étant une caractéristique intrinsèque de l'économie sociale, et la quête de modèles de professionnalisme appropriés se perpétuant, il est clair que nos tâches collectives de production du savoir demeurent inachevées.

Keywords / Mots clés: Social enterprise; Social economy; Professionalism; Variety; Knowledge production / Entreprise sociale; Économie sociale; Professionnalisme; Variété; Production du savoir

INTRODUCTION

Thank you very much for inviting me to give this keynote. It is an especially great honour to be giving this talk as we remember the life and work of Jack Quarter. The Association for Nonprofit and Social Economy Research (ANSER) as an organization is imbued with Jack's commitments to social justice, to theory and research in the service of improved practice, and to the generous sharing of knowledge; commitments that are exemplified in the open access stance of this journal and the association's annual conference.

I first got to know Jack Quarter in the context of the social economy suite of research partnerships. Between 2005 and 2012, he headed up the very successful and influential Community-University Research Alliance for Southern Ontario's Social Economy. This is just one of many major research awards that he held in his four-and-half-decade-long career at the University of Toronto, where he conducted research on and for co-operative education, union pension funds, worker and housing cooperatives, nonprofits—especially regarding the proper measurement and valuing of their volunteers—and latterly, social enterprise.

I was a member of the B.C.-Alberta Social Economy Research Alliance, known as BALTA. It was through BALTA that I met Jack's former student Peter Elson, then based at the Institute for Community Prosperity at Mount Royal University. Peter and I got together to work with David LePage and Enterprising Non-Profits (ENP), and eventually with partners in all provinces and territories except Québec, to conduct the Social Enterprise Sector Survey.¹ I also came to the social economy suite as a member of the Canadian Community Economic Development Network's (CCEDNet) research advisory committee. The network's members are a large and diverse group of community-based organizations, and the role of the research advisory committee was to advise members on how to engage with the research community, to prepare them to participate in research partnerships, and to demand from the academy the kind of research that would serve them best.

The social economy suite faced a core problem from its start, namely that while resources for research were made available to the academic sector working with community partners, accompanying resources for the professionalization and institutionalization of the sector were—with the exception of Québec—never put in place. The social economy suite had been a major initiative of then-Prime Minister Paul Martin, and it was also the product of lobbying in the early 2000s by the Chantier de l'économie sociale, the CCEDNet, and many others. The initiative was announced as a \$132 million program to invest in and build capacity in the social economy, including a \$15 million program of research administered by the Social Sciences and Humanities Research Council of Canada (SSHRC). Well, in January 2006, the minority Liberal government lost to a Conservative minority government. While the research funding was already committed, with the exception of Québec, the investment and capacity-building funds were cancelled by the new government.

The academics and practitioners who participated in the social economy research partnerships made a massive contribution to knowledge and practice, and many, including Jack's former students, academic colleagues, and practitioner collaborators, are now playing leading roles in the sector. But just think how different Canada's social economy might be today if officials in the Regional Development Agencies had been required in the 2000s to get serious about the economy beyond small business, resource extraction, and physical infrastructure. I can recall a FedNor² official telling me in 2005 how much anxiety all the talk of "social capital" was creating, about how it would disrupt their "normal" activities. Or, imagine how different Canada's social economy might be if the staff of Community Futures had been freed then to advise, support, and fund the economic initiatives of nonprofit social enterprises and cooperatives. As we know, elections have consequences.

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Currently, we are awaiting the roll-out of the now-minority Liberal government's Social Innovation and Social Finance Strategy, a ten-year program that promises \$755 million in repayable loans starting in 2020–2021. You may, like me, have experienced a nagging sense of *déjà vu* as we headed into the 2019 election season even though the complementary \$50 million Investment Readiness Program funding stream began to flow before the election. Leaders in the social economy sector have been talking a lot about the need for an ecosystem approach, which I think is a welcome and cautionary note about the potential pitfalls of a one-off injection of loan capital. They are calling, correctly, for more attention to the broader architecture of support for social enterprise development, itself embedded in a larger architecture of support for community development. We will see whether history repeats itself.

But what if history does not repeat, and the social innovative and finance strategy is fully funded? Researchers might build on the work of Margie Mendell (2003), Susan Phillips (Phillips, Laforest, & Graham, 2009), and others to examine how the increased availability of social financing might change the social economy sector. What will the availability of loan financing, albeit loans with zero percent interest, do for the delicate balancing acts that all social economy organizations must manage? Will more financing accelerate trends toward marketization? Will it polarize the sector between those who have—or believe they have—the revenue streams required to support loan repayment schedules, and those who do not? And what will happen to the social mission of loan recipients who find themselves unable to repay?

In his 2009 book with Laurie Mook and Ann Armstrong, Jack Quarter (Quarter, Mook, & Armstrong, 2009) advanced what they termed an “interactive approach” to defining the social economy. Through a series of overlapping Venn diagrams, they sought to emphasize the “dynamic interaction between the social economy and the private and public sectors” (p. 7). The interactive approach is helpful for understanding the dilemmas and opportunities that something like the social finance strategy presents to actors in the social economy. In this instance, a public sector initiative is encouraging the greater involvement of the social economy in market-entry processes of investment planning, the consideration of risk, and the creation of revenue streams (cf. Thümler, 2016). What are the emergent practices that will allow social economy actors to engage with this new opportunity, while avoiding known and unknown pitfalls? What role do academics, researchers, and educators, all broadly conceived, have to play in this process?

More generally, if fickle funding cycles and structures are unavoidable parts of the research, capacity-building, and operational landscape, and if the social economy contains a vital mix of established and emergent practices and organizations, how can we think about ways of working together that build and broaden the sector and not fragment or restrict it?

In the space available, I want to explore the interplay between three forces that I think will shape the next few years of social economy practice and research. The first is variety, both in terms of social need—from those persistent hard-to-tackle needs to the changing and emerging ones—and also in terms of the diverse and emergent organizational forms within the social economy. The second is knowledge production, which ranges from instrumental knowledge to inform practice, and from the identification of the limitations and unintended consequences of purposeful action to the critique of hidden power structures. Knowledge production is itself both enabled and constrained by professionalism, the third force I want to explore. Professionalism, or the way we structure practice, learning, and careers in the sector, is itself challenged by variety.

This will be a friendly critique, and I will be looking inward at the interaction between knowledge producers—the academy, researchers, reflexive practitioners—and knowledge users—managers, front-line workers, and co-producing clients—recognizing and celebrating the fluidity between these roles. I fully appreciate that social economic policy and technological change manifest in processes such as neoliberalism, global warming, inequality, financialization, and more, all of which profoundly affect the sector; but space does not permit me to focus on them here.

CONTEXTUAL AND ORGANIZATIONAL VARIETY

With respect to variety, I want to start by underscoring the well-established idea that the social economy necessarily consists of a heterogeneous, dynamic, and hybrid set of practices (see, for example, Akingbola, Rogers, & Baluch, 2019). This unsettledness derives from the balance that social economy organizations seek to achieve between their social and economic objectives. This fact sets the sector apart from the private and public sectors, at least in the short to medium term. In the private sector there are various organizational forms: from sole proprietors to independent contractors and from partnerships to listed corporations. But under capitalism, all private sector actors seek profit through market exchange. And under a stable constitutional order, while the objectives of governments may change, the institutions and organizations through which governments pursue these objectives are relatively stable. Social enterprises experience persistent variability in both objectives and organizational form. Now, I do not want to reduce all private sector actors to a singular short-term profit maximization motive, nor do I want to depict all government organizations as utterly static. But I do want to contrast the relative fixity, respectively, of their goals and structure, with the inherent variety of the social economy sector.

Without getting sucked further into the great social economy definitional debate, I would note that in Jack Quarter's (1992) book on Canada's social economy, he identified something like eight different types of cooperatives; he divided nonprofits into those that serve the public and humanitarian needs and those that provide services to members, mutual nonprofits. He divided nonprofits in public service into three groups: one that gains resources from fundraising, charitable foundations, or user payments; another that relies on volunteers; and government-sector nonprofits, including museums, hospitals, and educational institutions. Mutual nonprofits include economic organizations—labour, professional, managerial, business, and consumer associations—and social organizations—ethno-cultural religious organizations and social clubs. And let us not forget mutual self-help, neighbourhood, political, and environmental groups. Whew!

Cutting across this essentially purpose-driven definitional schema are considerations around formality and informality, legal status, internal structure, democratic decision-making, and more, creating a patchwork of seemingly endless organizational permutations.

And things change. In his 1992 book, Quarter discusses the fact that some social economy organizations obtain revenue “from commerce in the market, much like private-sector enterprises. Where they are financially self-reliant, these organizations can be described as ‘enterprises’, in that they are at risk in a competitive market” (p. 3). With some further qualifications and acknowledgement that the world is full of shades of grey, he does not use the term social enterprise again in the book. Of course, social enterprise received a lot more attention in his subsequent work (Chan, Ryan, & Quarter, 2017; Quarter, Mook, & Armstrong, 2009). But in Canada in 1992, social enterprise was merely an emergent form of social economy organization. Today, some might say that social enterprise has the tendency to suck all the air out of the room, with its misreported promise of delivering social benefit through heroic, neoliberalized, and entrepreneurial action. We now know that social enterprise itself is still a highly variegated and emergent organizational form. In the Social Enterprise Sector Survey, we sampled only nonprofit social enterprises. As an aside, I am uncomfortable with any definition—whether academic or programmatic—that contemplates that there can be such a thing as a for-profit social enterprise. Even the definition of social enterprise advanced in the social innovation and finance strategy (Canada, 2018), which says that the majority of profits should be put toward a social, cultural, or environmental mission, leaves me uncomfortable. I far prefer the Organization for Economic Cooperation and Development (OECD) report on “The Changing Boundaries of Social Enterprise,” which made the point that the legal regime for social enterprises should enforce some sort of asset lock or non-distribution constraint to ensure that the social mission is fulfilled (Noya, 2009).

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One finding of the Social Enterprise Sector Survey is that type of incorporation—whether the social enterprise is itself a nonprofit or a program of a nonprofit and whether it has charitable or cooperative status—is not a useful way to differentiate size, activity, and so on. Instead, a more useful way to classify social enterprises is purpose—whether its purpose is to raise income for a parent organization (12% of Canadian nonprofit social enterprises report this as their purpose); to pursue a particular social, environmental, or cultural mission (60%); or whether it is what we call multipurpose (28%), in which employment preparation, development, training, and creation are often a key goal (Elson, Hall, & Wamucii, 2016).

Canadian nonprofit social enterprises themselves embody the sector's variety. On average they are active in two business sectors; that's two of 17 broadly defined product and service groups, and we know they are not conglomerates! They have an average of 4.6 target populations, and 60 percent of them serve two or more target populations. And they engage members of these target populations in multiple, overlapping ways: as employees, trainees, clients, volunteers, donors, and so on.

This quantitative finding is supported by qualitative research I am conducting as part of the WISE Longitudinal Evaluation Project, which was started by Jack Quarter. Social enterprises addressing youth workforce integration are typically embedded in wider community-building and service-delivery agencies that are able to link-up various programs to meet the multiple needs of complex human beings. They often do so in a way that is opaque to program participants; this mixing and matching role is one of the particular advantages of social enterprises, but it also highlights their complementarity with state program-delivery systems.

Occupying such interactive spaces means that variety in organizational form is a central defining feature and challenge of the social economy (cf. Diochon & Anderson, 2011). The private and public sectors create and meet some social needs in highly uneven, differentiated, and shifting ways; it is left to place-based social economy actors to address the inevitable, multiple, and ever-changing needs that remain (cf. Shragge & Fontan, 2003).

And in Canada, of course, social need varies widely because of the physical reach of our nation; from settlers to First Nations, from Francophone to Anglophone, from old East to new West, from metropolitan south to hinterland north, from booming globalized urban to cyclical resource-dependent rural, and so on, Canada is characterized by a multiplicity of social and economic contexts in which the need for social economy action arises. Hence, we see interesting differences in the social economy across the country. To give another example from the Social Enterprise Sector Survey: in the British Columbia data, we found more similarities between inner-city and small-town social enterprises than between inner-city and suburban social enterprises. Those social enterprises in inner-city and small-town locations were similar in that they were smaller in terms of employment and finance, they served more target population groups and whole communities, and they were trying to sell goods and services into more markets. Social enterprises in suburban locations were larger and more specialized. Geography is an important factor shaping social enterprise, and Canada has lots of geography.

Variety is also shaped by the diversity of regulatory and institutional contexts across the nation—which inform both what is legally permitted and, more fundamentally, what are regarded as accepted organizational models for the social economy—from the co-op heavy Maritimes and Prairies to the enterprising nonprofits of the West to the much closer state-sector linkages in Québec (McMurtry & Brouard, 2015). For example, the median year in which Canadian social enterprises first started sales was 1993. This timing makes sense in relation to roll-back neoliberalism in Canada (McBride, 2005). However, 2000 is the median year of first market entry by British Columbia-based social enterprises; this coincides with the start of the ENP.

In summary, variety references the idea that social needs are diverse, complex, and always being revealed in new ways; similarly, varieties of social innovation to address these needs will emerge in a variety of organizational forms as people organize to try to solve them collectively. We need to allow the social economy to be nimble, to avoid being locked into rigid structures.

As I turn to my second point, knowledge production, I want to emphasize that organizational variety is not a problem in a dynamic system. Yes, we would rather not have new social needs arise just when we think we have met the existing ones, but that seems especially unrealistic today. There is a strand of thinking in economic geography that emphasizes the importance of “related variety” in order to understand the conditions in which innovation takes place (Frenken, Van Oort, & Verburg, 2007). New things, such as products, services, processes, and social innovations, happen when they combine distinct but related resources and assets. In other words, there is an important role for knowledge producers in comprehending both social need and the emergent organizational practices that seek to address them in their local context.

KNOWLEDGE PRODUCTION

Variety in the world, and particularly in the social economy, demands that we embrace a certain degree of pragmatism, heterodoxy, and humility in how we approach knowledge production. There has to be space for the creation of instrumental knowledge that can inform practice, just as there has to be space for critical knowledge to promote reflexivity and political action.

At the same time, we should not lose sight of the fact that knowledge production itself is unevenly distributed in an unequal society. The Social Sciences and Humanities Research Council of Canada (SSHRC) works incredibly hard to foster meaningful and inclusive research partnerships (Hall & MacPherson, 2011); we are lucky to have them. But the fact remains that no funding council can or should be expected to hand out money without demanding structure, organization, reporting mechanisms, and so on. However, this means that funded research always embodies a propensity to replicate some of the silos and rigidity for which the academy has a well-earned reputation, as well as benefitting some social economy actors and organizations more than others. More established social economy organizations are, by definition, more likely to be research-ready in the sense that they have structures, procedures, and an actual or insipient sense of professionalism that allows them to ask well-defined, researchable questions, and disseminate the findings. In contrast, I can recall having great difficulty convincing some nonprofit societies with vibrant businesses that they were, for our survey purposes, “social enterprises.”

I want to illustrate the importance of the structuring of knowledge production by reflecting further on the value and profound limitations of what the Social Enterprise Sector Survey could and could not achieve. The survey was originally begun in reaction to the preference of community development actors to create and share knowledge through storytelling and the cataloguing of “best practice.” To be clear, these are vital modes of sharing and improving practice. For example, when clients of the Elizabeth Fry Society who are also mothers share stories about how to structure childcare for single, working parents, they are engaged in vital acts of knowledge production and dissemination that surveys cannot replicate.

Still, stories alone cannot speak to government in support of a policy-development agenda. What David Le Page of the ENP asked us to do in 2009 was an economic impact study, no more, no less, designed to speak to government employees in a language they understood. And theirs is a language of numbers, preferably large ones.

It was only later, as the survey evolved beyond British Columbia and Alberta to include other provinces and territories, that I came to understand that the survey could also serve as a tool to promote sector development (Elson, Wamucii, & Hall, 2018). And once in hand, quantitative evidence can be put to work in critical analysis. For example, many if not

most social enterprises that are meeting their social purpose probably qualify for Quarter's notion of a "supported social enterprise," which cannot ever be expected to be fully self-funding (Chan, Ryan, & Quarter, 2017). Indeed, I would suggest that we should always be suspicious of claims about the ability of any organization to meet social need without some degree of redistribution, and the taxation that this implies. Our data showed that about three-quarters of surveyed social enterprises broke even in a given year, but only 40 percent had revenues—minus grants, donations, and loans—that exceeded expenses.

Hence, it is important to understand the source of these non-earned revenues. In an analysis of the British Columbia, Alberta, and Ontario survey data, Catherine Liston-Heyes, Nemanja Jevtovic, Peter Elson, and I found that social enterprises that receive more non-earned income are those that: 1) sell culture- and arts-related social goods; 2) are located in wealthier neighbourhoods; and 3) are "visible" beyond their locality (Liston-Heyes, Hall, Jevtovic, & Elson, 2017). In other words, social enterprise has the potential to replicate unequal sectoral, social, and geographical distribution patterns.

Visibility references a core challenge of the social economy. Modern accounting exists as a way for businesses to make their financial value visible and legible to investors. An inherent danger in the social finance strategy is that the ability or inability to repay a zero-interest government loan may become *the* salient fact that crowds out all other things that are knowable about a given social economy organization. I am not sure which misreading would be worse: reading inability (to repay) as mission failure, or reading ability (to repay) as a financialization opportunity. In contrast, Laurie Mook and others (Mook, Quarter, & Richmond, 2007) have shown social accounting, documenting volunteerism, or calculating health dollars saved to be an effective means of communicating the complex benefits of the social economy. We need to continue to develop these measures and insist on their usage, while acknowledging their limitations.

I have come to think that the forms of evidence, be they spreadsheets or stories, are perhaps less important than their purpose and the context in which we make meaning from them. The question then is, how can we contain knowledge production about the social economy within a larger architecture of meaning-making in which no single perspective dominates? In this I am inspired by the ideas of Bent Flyvberg and others who promote the stance of applied phronesis (Flyvberg, Landman, & Schram, 2012), in which research is guided less by theory or method, but instead by asking how research can help social actors to address their own self-defined needs. And it is here where I want to position the role of social economy professionals, as a bridge between research and practice.

PROFESSIONALISM IN THE SOCIAL ECONOMY

There have long been calls for a greater sense of professional identity in the social economy, and I think by now you will have sensed that I see bonds of shared skills, identity, ethical commitment, and experimental practice as important to meeting the challenges of variety and knowledge production confronting the sector. It has long been a goal of sector intermediaries, such as the Social Enterprise Institute, Charity Village, Ontario Non-Profit Network, CCEDNet, Imagine Canada, and the networks of federal and provincial cooperative organizations, to promote professionalism, whether in collaboration with universities or not. But there are some thorny questions at the heart of the pressures for more professionalism. Navigating them successfully is the third and final challenge I will discuss.

Partly, the call for professionalization derives from a recognition of increasing societal complexity and the need for specialization. But it also comes from a desperate need to create recognizable and meaningful career pathways for practitioners. The general trend toward contingency in employment is especially intense in the social economy. Katherine Scott's (2003) report *Funding Matters* set the context for Rebecca Saunders and Richard Brisbois' (2004) depiction of employment in the voluntary sector as *Passion and Commitment Under Stress*. More research is needed to update these insights, but we are starting to understand some of the longer-term consequences of an operational model that

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starts with project-based funding rather than core funding, and that has inbuilt expectations of fluidity, flexibility, innovation, and disruption. A recent report by the Ontario Nonprofit Network (2018) called *Women's Voices* characterized the nonprofit sector as feminized, which means that gender shapes every aspect of work in the sector, from the very notion of care to career ladders and from who gets into leadership roles to who gets the lower earnings. Employment in the social economy is not unaffected by neoliberalism, precarity, and patriarchy; indeed, it is intimately bound up in those same social processes.

There is a balance to be struck here; somewhere well away from the extremes of a vow of poverty and inflated entrepreneurial returns are stable career pathways, a living wage, and working conditions that support social economy missions. Professionalism in the sense of being a long-term commitment to the occupation more than to any particular employer or project is an important piece of this puzzle.

Education, both foundational and continuing, is also a core element of professionalization. While there are numerous certificate programs, especially in nonprofit management, there are relatively few university degree programs in the social economy in Canada. Social economy organizations seeking to work with universities should be aware of the forces pushing us in the academy in the direction of short-term, utilitarian relationships, and into relationships that favour the best resourced and most well-established community partners. This is not to say that the sector should give up but rather that it should recognize that it is hard for a large, bureaucratic organization such as a university to work with emerging, innovative, and risky community-based initiatives.

Within the academy, we need to have a serious debate about where to situate social economy education. For instance, what role might business schools play? It is truly exciting when business students get engaged by social entrepreneur “*Dragon's Den*-type” competitions to come up with innovative solutions to social problems. These students are taught to think about financial viability, how strategy translates into organization, and how to market or communicate with target audiences, and their ideas are often plausible and compelling. But they are also often taught—or perhaps they are predisposed—to accept the core propositions of the neoliberal order: the risk taken by entrepreneurs is to be rewarded financially, competitive allocation systems are inherently superior, and business and financial success is the best indicator of success in other arenas.

Not to dump on business schools! We could apply the same critique of management training's limited vision and implicit ideological stance toward public management or policy analysis training, which produces students that are superbly well trained in cost-benefit analysis, social accounting matrices, analyzing social and political trade-offs, and multi-criteria decision-making, but that nevertheless seek policy solutions that contain (indeed constrain) issues and approaches within the kind of categories and boxes that a state needs in order to make sense of the world. And one could make similar criticisms of social work, nursing, education, (my own field of) urban planning, or any of the other fields of post-secondary education that regularly produce social economy practitioners.

All of this leads me to conclude that there is no magic bullet of discipline-linked professional education that can meet the sprawling needs of the sector. While specific business, organizational development, and service-delivery skills are important, an understanding of the big-picture political economy and the interactive nature of the sector is equally important, as is competence in knowledge production and dissemination. There is a balance to be achieved here; I am sure that we would not want to create a social economy profession similar to accounting or engineering or law, where the boundaries of practice are vigorously policed. Where would this leave the essentially democratic and emergent dimensions of the social economy?

In the end, I favour a professionalization that is stronger on employment conditions, career development, and ethical and reflective practice and weaker (or more open) on the question of what specific knowledge domains must be mastered. After all, variation is an inherent characteristic of the social economy, and our collective knowledge production task remains unfinished.

NOTES

1. See Elson and Hall (2012). Reports and working papers are available on the project website (SESS, 2018). De-identified microdata from the 2014–2015 round of surveys has been made available to researchers, students, and policy-makers in SPSS data format via Simon Fraser University's institutional data repository (SFU Radar, 2019).
2. FedNor is the Federal Economic Development Initiative for Northern Ontario, ACOA is the Atlantic Canada Opportunities Agency, WD is Western Economic Diversification Canada, CED is the Canada Economic Development for Quebec Regions, CanNor is the Canadian Northern Economic Development Agency, and FedDev is the Federal Economic Development Agency for Southern Ontario. The Regional Development Agencies focus primarily on small and medium-sized business finance and support, although co-operatives, not-for-profits, and communities are typically eligible for funding for programs and projects that support (private sector) economic development.

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