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EDITORIAL: Stability Amidst Change
ÉDITORIAL: La stabilité face au changement

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Welcome to the Spring 2019 issue of ANSERJ! The theme for this issue is *Stability Amidst Change*. The fields of nonprofit and the social economy are constantly going through changes and adaptations. These changes can be as concrete as the shifting nature of public and social policies within our political discourse. New policies can be enabling while others can result in thwarting progress in our work. Other changes can be as broad as membership renewal or evolving strategies supporting organizational development. Despite change being a regular feature of our work, there are areas that remain stable. One of these is the necessity of developing evidence through research that responds to changes that could impact nonprofit and social economy organizations in unexpected ways. The articles in this issue are illustrative of integral topics that include strategies and insights adapted to a variety of challenges that can test our will and determination for a better society.

Bienvenue à ce numéro de l'ANSERJ pour le printemps 2019! Son thème est *La stabilité face au changement.* En effet, les domaines des organisations sans but lucratif et de l'économie sociale subissent sans cesse des changements et des adaptations. Ces changements peuvent être très concrets, comme ceux liés à la nature des politiques publiques et sociales dans le discours politique. Certaines de ces nouvelles politiques peuvent être positives, tandis que d'autres peuvent entraver la progression de nos travaux. D'autres changements encore peuvent être vastes, comme le renouvellement de l'effectif dans les organisations ou l'évolution des stratégies pour le développement organisationnel. Bien que le changement fasse partie de notre travail, certains sujets demeurent stables. L'un d'entre eux est la nécessité d'utiliser la recherche pour mieux apprendre comment les organismes sans but lucratif et de l'économie sociale réagissent au changement et comment ils peuvent avoir un impact inattendu sur celui-ci. Les articles dans ce numéro illustrent des sujets portant sur des stratégies et des pistes de réponse à une variété de défis qui peuvent mettre à l'épreuve notre volonté et notre détermination d'améliorer la société.

In this issue, we have four articles and one book review. In his article, **Dougherty** provides a very interesting analysis of the impact that the concept of trust can have on reporting by Canadian charities. **Dart, Akingbola** and **Allen** examine the concept of the shared platform as it relates to the structure, organization, and evolution of nonprofit entities. We also include two pieces that examine the topic of volunteerism: **Pearce** and **Kristjansson** provide an analysis of youth volunteerism in neighbourhood contexts; **Cousineau** and **Misener's** article provides important considerations associated with the key role that volunteerism can play in transitioning towards retirement. We conclude with a review by **Robichaud** of Une coopération Québec-Haïti innovante en agroalimentaire : l'économie sociale et solidaire en mouvement, a book coedited by Yves Vaillancourt and Christian Jetté. We believe that this mix of articles continues to reflect the breadth of ANSERJ's readership.

As the new leadership team, we are currently reviewing all aspects of the journal. While change can be exciting, we assure all readers that the journal will continue to reflect the highest standards as well as the rigour that is expected of the peer review process. We want our authors to know that, when they submit a piece to ANSERJ, they can be certain that they have made the right choice. As for our reviewers, we are appreciative of their time and we want to assure them that we value and respect their comments. We also encourage you, our readers, to consider submitting a piece to the journal in the future.

ANSERJ will continue to reflect the dynamism of the nonprofit and social economy fields, and we will be introducing exciting innovations in the fall. We want to see more submissions that represent the broader field of our work, so we plan to publish a greater variety of papers. In this regard, there is a new call for papers that can be found on our website, www.anserj.ca. Finally, if you have not done so already, please register to the site so you can receive updated information and announcements about the journal. We hope that you enjoy this issue!

Ce numéro comporte quatre articles et une critique de livre. Dans son article, **Dougherty** fournit une analyse très pertinente de l'impact que la notion de confiance peut avoir sur les rapports entretenus par les organismes de bienfaisance canadiens. **Dart, Akingbola** et **Allen** examinent le concept de la plateforme partagée par rapport à la structure, l'organisation et l'évolution des entités sans but lucratif. Nous incluons en outre deux articles portant sur le bénévolat : **Pearce** et **Kristjansson** analysent le bénévolat des jeunes dans le contexte du quartier; **Cousineau** et **Misener** quant à eux présentent des considérations importantes sur le rôle joué par le bénévolat dans la transition vers la retraite. Nous concluons par une critique de **Robichaud** d'un livre publié sous la direction d'Yves Vaillancourt et Christian Jetté, Une coopération Québec-Haïti innovante en agroalimentaire : l'économie sociale et solidaire en mouvement. Ces divers articles continuent à refléter la diversité d'intérêts parmi les lecteurs et lectrices de l'ANSERJ.

Étant une nouvelle équipe de direction, nous examinons actuellement tous les aspects de la revue. Bien que le changement puisse être excitant, nous tenons à assurer à tous nos lecteurs et lectrices que le journal continuera à respecter les plus hautes normes ainsi que la rigueur propre au processus d'évaluation par les pairs. Nous voulons que nos auteurs soient confiants que, lorsqu'ils soumettent un article à l'ANSERJ, ils ont définitivement fait le bon choix. Quant à nos pairs évaluateurs, nous sommes reconnaissants de votre travail et nous tenons à vous assurer de la valeur que nous attribuons à vos commentaires. D'autre part, nous encourageons nos lecteurs et lectrices à envisager de soumettre un article au journal un jour.

L'ANSERJ continuera à refléter le dynamisme des domaines des organismes sans but lucratif et de l'économie sociale. Pour ce faire, nous projetons de présenter des innovations intéressantes en automne. Nous souhaitons voir davantage de soumissions représentant la richesse de notre champ de travail, et nous comptons donc publier une plus grande variété d'articles. À ce titre, un nouvel appel à contributions est accessible sur notre site Web, www.anserj.ca. Enfin, nous vous invitons à vous inscrire sur notre site si vous

We conclude this editorial by acknowledging the passing of one of the founders of ANSERJ, a giant in the non-profit and social economy fields. Jack Quarter passed away peacefully in February 2019, and we certainly feel the gravity of this loss. At the same time, his legacy continues to have an impact on many of us around the world. We are in the process of deciding how best to honour that legacy as a key part of the future of this journal, and we welcome any suggestions. In the meantime, please visit www.jackquarter.org, a site that was developed in his honour. Much of the content may surprise many. Farewell to a dear friend and mentor.

ne l'êtes pas déjà afin de recevoir les dernières annonces et nouvelles concernant le journal. Et nous espérons que vous apprécierez ce numéro de la revue!

Nous concluons cet éditorial en soulignant le décès de Jack Quarter, un des fondateurs de l'ANSERJ et une autorité incontournable dans les domaines des organisations sans but lucratif et de l'économie sociale. Celui-ci est décédé paisiblement en février 2019, et nous ressentons vivement cette perte. En même temps, nous savons que ses actions continueront à avoir un impact sur de nombreuses personnes à travers le monde. Nous sommes en train de décider de la meilleure façon de faire de son legs un élément essentiel de l'avenir de cette revue. Toute suggestion de votre part est la bienvenue. En attendant, veuillez visiter le site www.jackquarter.org, qui en sa mémoire. Son contenu pourrait en surprendre plus d'un. Adieu, cher ami et mentor.

Trust and Transparency: Accreditation and Impact Reporting by Canadian Charities

Christopher Nicholas Dougherty
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ABSTRACT

This article examines the public reporting of impact, defined as progress towards a charity's mission and long-term objectives, by Canadian charities through their annual reports. The public reporting behaviour of those accredited under Imagine Canada's Standards Program is compared with a matched sample of charities that have not sought accreditation. The objective is to explore whether trust-building activities like public disclosures of impact and third-party accreditation are convergent. The study finds that accreditation status correlates with impact measurement and reporting; both trends are linked to organizational size, and accreditation does not appear to be causing charities to increase their disclosures of impact, which suggests that there may be underlying factors driving both behaviours. These findings generally affirm earlier research that correlates organizational size with impact measurement, adding that the effect is weak.

RÉSUMÉ

Cet article examine comment les associations caritatives canadiennes, dans leurs rapports annuels, rendent compte de leur impact, c'est-à-dire de leur progrès par rapport à leur mission et à leurs objectifs à long terme. Cette étude compare les comptes rendus d'associations accréditées par le Programme de normes d'Imagine Canada avec un échantillon apparié d'associations qui n'ont pas été accréditées. L'objectif est de déterminer s'il y a convergence parmi les démarches entreprises pour gagner la confiance du public telles que l'accréditation par un tiers et la divulgation d'impact. Cette étude observe que les associations accréditées sont plus enclines à mesurer et à divulguer leur impact; que ces deux pratiques sont plus communes dans les grandes associations; et que l'accréditation à elle seule n'entraîne pas forcément les associations caritatives à divulguer leur impact, ce qui suggère que des facteurs sous-jacents sont peut-être responsables pour les deux pratiques. En général, ces conclusions confirment des recherches antérieures trouvant une corrélation entre la grandeur d'un organisme et le désir de mesurer son impact, bien que ce lien semble être faible.

Keywords / Mots clés   Nonprofit self-regulation; Accreditation; Transparency; Impact reporting; Imagine Canada Standards Program / Autorégulation des organismes à but non lucratif; Accréditation; Transparence; Communication d'impact; Programme de normes d'Imagine Canada

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INTRODUCTION

A rising chorus of voices in the charitable sector is calling on the media and watchdogs to stop measuring and reporting on the effectiveness of charities using the easy-to-calculate "overhead" ratio of administrative-to-program costs. This financial ratio is misleading and does not correlate well with actual measures of effectiveness or performance (Wetherington & Daniels, 2013). Instead, these watchdogs are being called upon to measure and report on charitable impact, which should result in charities making a bigger, better difference in their communities, and make it easier for them to connect with donors and the public (MacLaughlin, 2016; Maloney, 2012; Morino, 2011; Pallotta, 2013). The chorus reflects public opinion, with 74 percent of Canadians saying they want more information on the impact that charities have (Lasby & Barr, 2013). Some charities have started listening to this chorus and are picking up the tune (GuideStar, 2013).

An important step to institutionalizing better governance and organizational practices that should, in theory, enhance the performance and impact of charities was the creation by the sector of an accreditation program in 2012. The Imagine Canada Standards Program is a rigorous system of accreditation involving self-study and peer assessment on 73 standards, including nine standards requiring boards to review or evaluate parts of their organization's operation, and another nine requiring organizations to publicly disclose specific information on their public website.

The objective of this article is to explore the extent to which these trends are convergent and to understand whether accreditation might be contributing to increased impact reporting. Public reporting of impact by Canadian charities is examined through their annual reports, comparing the reporting behaviour of those accredited under Imagine Canada's Standards Program with a matched sample of charities that have not sought accreditation. The purpose in exploring this question is to understand whether these two trust-building activities are occurring together (or if one leads to the other) and to identify if organizational capacity, measured using both annual revenue and accreditation status as proxies, plays a significant role in charities building trust with the public. The expectation is that participation in an accreditation program would increase public disclosures of impact, in part because the emphasis in the standards on improved governance practices and the regular evaluation of information by organizational boards builds capacities that contribute to effective and integrated evaluative activities in nonprofit organizations (Carman & Fredericks, 2010). Before turning to the empirical analysis, the first step is to establish whether the literature supports this view and whether creating greater transparency has a positive effect on public trust, which is the rationale underpinning accreditation systems.

LITERATURE REVIEW

Trust and transparency

This article begins by examining the notion that public reporting on impact by charities contributes to stronger connections among charities, donors, and the public. Making this link is important because trust building (referred to as "public confidence") is a core goal of the Imagine Canada (2012) Standards Program. For many people, the overall level of trust in a charity correlates with familiarity with charities and their work (Lasby & Barr, 2013); in other words, Canadians who know more, trust more. Unfortunately, only 25 percent of Canadians are "highly familiar with charities and their activities" (Imagine Canada, 2016, n.p., which means that charities that are concerned with public trust have work to do.

Broadly, trust, transparency, and accountability are closely related, mutually reinforcing concepts for organizations with perceived transparency, and they correlate with higher levels of trust in an organization (Auger, 2014; Schnackenberg & Tomlinson, 2016). When talking about the trust that people have in an organization, it is mostly determined by competence—the ability to accomplish what it says it will do and a record of successfully doing what it says it will do—and is affected by an organization's openness to criticism and admission of mistakes (Auger, 2014). Transparency, through an obligation to inform and to explain and justify conduct, is an element of accountability (Bovens, Schillermans, & Goodin,

2014) and is built on dimensions of disclosure, clarity, and accuracy (Schnackenberg & Tomlinson, 2016). The charitable sector in Canada has talked about accountability measures in these same terms, saying "the ultimate goal of accountability is to demonstrate that an organization does good in a good way," (Panel on Accountability and Governance in the Voluntary Sector, 1999, p. 36). Trust in organizations can also be supported, but not driven, by the disclosure of program outcome information on agency websites (Grimmelikhuijsen, 2012).

While general levels of trust in charities in Canada are high, and have been stable for some time (Lasby & Barr, 2013; McKeown & McKechnie, 2000), Canadians would like more information from charities about two things: 1) the programs they provide and their impact, and 2) the cost of fundraising and the use of donations (Lasby & Barr, 2013). Higher self-rated subjective knowledge of the sector correlates with feelings of trust and accountability (Lasby & Barr, 2013) and influences donating and volunteering behaviour more than demographics alone would predict (Bourassa & Stang, 2016).

However, those who give more may also expect more information and more transparency from the charities they support (Bourassa & Stang, 2016), and the returns for feeding this expectation may not be high enough to justify the costs as, in some cases, increased charitable accountability may not correlate with increased donations (Berman & Davidson, 2003), including cases of increased externally imposed accountability driven by third-party rating systems (Szper & Prakash, 2011). So, recognizing the costs, charities should avoid pursuing transparency for its own sake and use it with intention and purpose as a tool for pursuing other objectives (Tyler, 2013).

While it is clear that the public wants to know more about what charities do for their communities, it is unclear how or if their behaviour will change if they do know more (Szper & Prakash, 2011). Based on the literature, it can be reasonably argued that a likely result, and reasonable objective, of addressing the program/impact information gap should be increased public knowledge leading to greater trust in charities, which, in turn, should contribute to increased donations and volunteerism. Presumably, posting program and impact information on charity websites would be an appropriate way of sharing this information with donors and the public.

Relationship between standards and trust
Imagine Canada (2016), which developed and administers a voluntary standards program for Canadian charities found that, "transparency and sound management are the top considerations when deciding whether to support a charity for 86% of Canadians … Nearly three quarters (72%), for example, said they were more likely to trust and have confidence in charities that have achieved third-party accreditation. Half indicated that they would be more likely to give to a charity that had achieved rigorous accreditation standards" (n.p.). This mirrors findings from the Netherlands that donors who know about voluntary charitable accreditation systems trust charities more and donate more, especially among people with moderate and higher levels of general social trust (Bekkers, 2003).

Imagine Canada's (2014) standards deal with governance, financial oversight, fundraising, staff management, and volunteer management. They do not address program evaluation, impact, or the public reporting of impact (except by requiring organizations to not lie or make misleading statements). This means that any effect from accreditation on impact reporting behaviour will be indirect and likely connected to the demonstrated willingness of accredited organizations to comply with standards requiring them to evaluate their processes and post information about their organization on their public websites. The public reporting of impact also appears consistent with what principal-agent theory suggests about accountability clubs such as the Imagine Canada standards: they are a means to signal to donors and funders (as principals) that they can trust an organization is using its resources in the manner intended by the principal. They also provide branding benefits to the participating organizations that outweigh the costs of participating in the signalling activity (Prakash & Gugerty, 2010).

Impact measurement

Impact measurement refers to measurable progress that a charity makes towards its mission and long term objectives, and this matters because charities ought to know whether they are providing a net benefit to their beneficiaries (Sawhill & Williamson, 2001) or, at the very least, not doing more harm than good (Dubner, 2017). It includes a range of measurements with different levels of rigour, validity, and difficulty that has emerged and developed over the last 20 years.

The distinct measurement of impact appeared when the United Way of America started using and promoting outcome measurement with the release of its out-come measurement kit in 1996 (Legowski & Albert, 1999; Plantz, Greenway, & Hendricks, 1997). Even though it is important, there is no broad, common un-derstanding of what impact is or how to measure it (Rockefeller Foundation & Goldman Sachs Foundation, 2003).

In some paradigms, impact measurement is not directed at a single decision-maker but at "all major stakeholders who may play a role in maintaining, modifying or eliminating the program [and] these stakeholders in turn should be appropriately informed of the results of the evaluation" (Thompson, 1992, p. S68). This fuzziness is complicated by calls to add co-determination measures to impact measures, where the goals of an organization's beneficiaries are negotiated into the charity's measurements of success (Benjamin & Campbell, 2015; Gripper, Kazimirski, Kenley, McLeod, & Weston, 2017; Legowski & Albert, 1999). There is also some suggestion that the choice of impact measurement methodology can or should vary with project, program, or organizational life-cycle stage (Clark, Rosnzweig, Long, & Olsen, 2004; Preskill, Parkhurst, & Splansky Juster, 2014).

Table 1. Consolidated typology of impact measurements

Category	Performance measures The production of outputs, delivery of services, accomplishment of objectives, achievement of results or impacts (Brinkerhoff, 2001).		Financial measures The compliance with laws, regulations, and procedures for the transparent allocation, expenditure, and reporting of financial resources (Brinkerhoff, 2001).	
	Type	Definition	Type	Definition
Capacity measures (Sawhill & Williamson, 2001)	Adherence to service delivery quality standards (Plantz, Greenway, & Hendricks, 1997)	"Includes staff qualifications, staff-client ratios, service delivery practices, record keeping, confidentiality practices, and facility conditions" (Plantz et al., 1997, p. 16).	Proportional financial measures	Graphics or other representations of the relative proportion of revenue or expenses related to a given category, presented without absolute amounts.
			Financial accountability measures (Plantz et al., 1997).	Documenting how funds are spent (Plantz et al., 1997). Includes summarized, consolidated, and complete financial statements.
	Participant related measures (Plantz et al., 1997)	Demographic characteristics, information about the client's problem or status prior to service (Plantz et al., 1997).	Key performance indicators (Plantz et al., 1997).	Ratios between inputs, services, outputs, and total costs (Plantz et al., 1997)

Table 1. (continued)

Category	Performance measures … continued		Financial measures … continued	
	Type	Definition	Type	Definition
Activity measures Progress toward operational goals and program implementation (Sawhill & Williamson, 2001)	Program output measures (Plantz et al., 1997; Salamon, Geller, & Mengel, 2010)	Units of service provided including quantity and quality (McNamara, 2007; Plantz et al., 1997); this area of measurement is generally, "insufficient for assessing nonprofit performance," (Benjamin, 2012, p. 439).	Multidimensional scorecards (Salamon et al., 2010)	A suite of indicators that addresses the whole operation and emphasizes utilization and risk measurements across financial, customer, internal operations, and organizational capacity domains (Clark, Rosnzweig, Long, & Olsen, 2004; Legowski & Albert, 1999).
	Client/customer/patron satisfaction surveys or focus groups (Plantz et al., 1997; Salamon et al., 2010)	Includes physical and cultural accessibility, timeliness, courteousness, physical condition of facilities, and overall satisfaction (Plantz et al., 1997). In some settings, higher satisfaction may be INVERSELY related to positive outcomes and may lead to higher rates of negative outcomes (Fenton, Jerant, Bertakis, & Franks, 2012).		
Impact measures Progress toward mission and long-term objectives (Sawhill & Williamson, 2001)	Outcome measures (Salamon et al., 2010)	Improvements over time in knowledge, attitudes, values, skills, behaviours, condition, or status that are measurable in quantity and quality (Benjamin, 2008; McNamara, 2007; Plantz et al., 1997). Informed by models that can be called a Theory of Change or Logic Model. Programs have initial, intermediate, and long-term outcomes, but, at the longest term, less influence that can be attributed to a specific program (Plantz et al., 1997). Outcomes at all levels are also influenced by context (Gripper, Kazimirski, Kenley, McLeod, & Weston, 2017).	Benefit/cost ratios (Salamon et al., 2010)	Economic analysis where costs and social impacts are expressed in financial terms and then assessed by a standardized ratio (Clark et al., 2004). May include net present value (NPV), benefit-cost ratio, internal rate of return, cost minimization analysis (CMA), cost benefit analysis (CBA), cost effectiveness analysis (CEA), cost utility analysis (CUA), and a range of other similar funder created measures (Clark et al., 2004; Legowski et al., 1999; Tuan, 2008).
	Social auditing (Panel on Accountability and Governance in the Voluntary Sector, 1999)	A systematic examination of an organization's impact on a community including impacts outside of its primary mission (Candler & Dumont, 2010; Panel on Accountability and Governance in the Voluntary Sector, 1999).	Social rate of return measures, (Salamon et al., 2010)	A combination of benefit/cost ratios and private sector financial analysis tools (Clark et al., 2004) which can include social return on investment (SROI) (Muir & Bennet, 2014).
	Benchmarking (Salamon et al., 2010)	Comparison of organizational outcomes with regional or national outcomes for similar interventions or programs.		
	Random assignment comparisons (Salamon et al., 2010)	Use of randomized trials with controls to measure and validate impact.		

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In order to make sense of the broad, inconsistent, and overlapping typologies and models for impact measurement found in the academic and grey literature, Table 1 consolidates the models and definitions into something resembling a cohesive, defined set of measurement categories. To capture as many of the broad and emerging impact measurements as possible, the full range of measures in Table 1 were looked for during the study. Of particular importance: outcome measurement is classified as a sub-type of impact measurement, and output measurement is classified as a sub-type of activity measurement.

Organizational barriers to impact measurement and reporting

Despite what a funder or member of a public may want to know about the impact of a program, the capacity of a charity to meaningfully measure impact is a concern (Benjamin, 2010; Hall, Phillips, Meillat, & Pickering, 2003; Legowski & Albert, 1999; Panel on Accountability and Governance in the Voluntary Sector, 1999; Schmitz, Raggo, & Bruno-van Vijfeijken, 2012). Measurement is an activity that costs money and time, and charities of any size typically do not have a lot of either, as spending on administration is proportionately consistent regardless of size (van der Heijden, 2013).

There are a number of hazards to charities that report on impact measures that may be creating barriers to measurement: funding shifting to easier-to-measure programs or programs with more appealing outcomes; compromised privacy for beneficiaries and staff; adjusting, cherry-picking, or fudging reported data to make the impact seem better than it is; and imposing additional costs that other competing organizations may not have to incur (Legowski & Albert, 1999). Possibly due in part to these barriers, most measurement and reporting seems to be happening in the realm of inputs, processes, and outputs (Legowski & Albert, 1999), which is easier to do but less indicative of impacts. Complicating these barriers is the finding that charities are unclear on the definitions of outputs and outcomes, which may be leading them to incorrectly believe they are measuring impact when they are actually measuring activities (Hall, Phillips, Meillat, & Pickering, 2003).

Additionally, for religious charities that operate as houses of worship, the organizations may believe that they do not provide tangible services and do not have measurable objectives, making impact measurement and reporting by these charities not meaningful (Hackett, 2016).

Organizations that are measuring impact

Generally, about two-thirds of charities in the United States and Canada believe they are measuring some form of impact. A 2003 (Hall et al., 2003) self-reported survey of 1,965 randomly selected Canadian charities found that 76 percent measured activities/outputs, 66 percent measured outcomes/impact, 65 percent measured satisfaction, and 54 percent measured financial costs. In interviews with leaders of United States-based transnational charities, 42.8 percent of leaders reported that their organizations were evaluating projects and programs as part of their accountability programs (Schmitz, Raggo, & Bruno-van Vijfeijken, 2012). A survey of organizations in the United States found 95 percent measuring outputs, 68 percent measuring outcomes, and 87 percent measuring satisfaction (Salamon, Geller, & Mengel, 2010). In a 2017 survey, 65 percent of responding Canadian foundations used some form of evaluation for internal learning (Philanthropic Foundations Canada, 2017). In all of these cases, results were self-reported, likely leading to overstated positive results. In many cases, data were collected from a sub-sector or a set of organizations with greater capacity, which may limit its generalizability to the charitable sector as a whole.

Public disclosure of impact is much less prevalent than measurement. Only 28.3 percent of United States-based transnational charities were publicly disclosing information as an accountability practice (Schmitz et al., 2012), only 17 percent of Canadian foundations share the results of their evaluations externally (Philanthropic Foundations Canada, 2017), and for American foundations, "[only a] small minority of organizations … seemed to make a concerted effort to build trust and allay donor concerns through extensive efforts at transparency and voluntary disclosure" (Saxton & Guo, 2011, p. 287).

For both measurement and the disclosure of impact, size matters. In Canada, organizations with larger revenue were more likely to conduct evaluations (Hall et al., 2003). A review of 117 community foundation websites in the United States found that online disclosure and dialogue accountability activities correlated with foundation size, as measured by the value of assets (Saxton & Guo, 2011). Interestingly, a study of Taiwanese medical organizations found that the voluntary public disclosure of financial results correlates with smaller institutional size (Saxton, Kuo, & Ho, 2012). Organizational size having the opposite effect in Taiwan from what other studies have found in predominantly Anglo contexts may indicate that there is some interaction between cultural context, size, and transparency practices.

Recently, shared measurement, where organizations with similar programs are sharing metrics, using common tools, and sometimes pooling their findings, seems to have become an emerging theme (Gripper et al., 2017). This practice may lead to an increase in the number of organizations doing impact measurement by reducing the administrative burden for single organizations and increasing disclosure and the sharing of results within networks.

Impact reporting in annual reports

The next thing to consider is: where might a member of the public or a potential donor expect to find information on a charity's impact? First, organizations accredited by Imagine Canada (2014) are required to produce and post annual reports on their website under standard B10. Second, many non-accredited organizations produce annual reports as a way to communicate results to their donors, partners, and other stakeholders. Third, a Canadian guide to annual reports has been produced that encourages organizations to use part of their annual report to "explain how the activities of the past year relate to the organization's strategy. Performance measures can be used to define and measure an organization's progress towards achieving its goals" (Chartered Professional Accountants Canada, 2011, p. 13), which is an idea that is gaining traction with regulators in similar contexts (Australian Accounting Standards Board, 2015; Spencer, 2015; Tyler, 2013). Fourth, 74 percent of Canadian charities use evaluation information to increase awareness of their cause to at least a moderate extent, and 52 percent use it for fundraising (Hall et al., 2003). Canadian charities have indicated that an annual report is the easiest place to share their impact measurement results (Panel on Accountability and Governance in the Voluntary Sector, 1999). Therefore, a reasonably likely place where a member of the public or a donor could find information about an organization's measured impact is in its annual report.

HYPOTHESES

In order to explore whether trust-building activities like public disclosures of impact and third-party accreditation are convergent, three hypotheses (described below) are proposed. These are intended to test convergence in three distinct, but closely related ways: whether the accreditation status of charities matters; if accreditation matters, how the rate of disclosures compares to what previous studies have found; and the effect of organizational size on disclosure behaviour. Charities come in a wide range of sizes and capacities. Those that are accredited by Imagine Canada have shown a capacity and interest in improving their governance and management practices, regardless of their size (the smallest accredited charity had an annual revenue of less than $45,000 in 2015). Based on demonstrated capacity, it is possible that these accredited charities are more likely to measure and publicly disclose their impact.

Hypothesis 1 Imagine Canada accreditation will correlate with a greater public disclosure of program impact through annual reports than occurs among Canadian non-religious charities in general.

Other findings of rates of impact measurement (Hall et al., 2003; Philanthropic Foundations Canada, 2017; Salamon et al., 2010; Schmitz et al., 2012) were based on self-reported impact measurement activity, which would tend to be over-

stated. Additionally, organizations are more likely to report positive results, which may lead to public under-reporting of impact measurement activities that are neutral or negative.

Hypothesis 2 Imagine Canada accreditation will correlate with rates of public disclosure of program impact that are less than the rates of impact measurement found in earlier self-reported studies.

Despite having the demonstrated capacity to gain accreditation, smaller organizations still have fewer resources and capacity than larger organizations.

Hypothesis 3 Within accredited organizations, larger size, as measured by annual revenue, will correlate with more rigorously measuring and publicly disclosing program impact.

METHODOLOGY

Quantitative methods using nominal level variables were used to examine the variance of reporting behaviour by charities with their accreditation status and size by revenue. Data were collected from the Canada Revenue Agency (CRA) website (including the publicly available portions of T3010 filings), charity websites, and by reviewing charity annual reports. Two lists were created: the population of Imagine Canada-accredited organizations as of August 15, 2017, and a control sample of 381 random non-religious Canadian registered charities from a population of 53,313 for a confidence interval of +/- five percent, 19 times out of 20.

To create the Imagine Canada accredited list:

1 The list of accredited organizations was pulled from the Imagine Canada website.
2 The website of each organization was visited to pull its business number.
3 The business number was compared to the CRA list to determine the registered charitable category.
4 The annual revenue (line 4700) and expenses (line 5100) were copied from their 2015 T3010 data on the CRA website.
5 Each organization's posted annual report was reviewed following the process outlined below.

Four accredited organizations are nonprofits that are not registered as charities, and they were excluded from data collection and analysis. Twenty-one accredited charities (including fifteen YMCAs and two YWCAs) fall under religious categories, and they were excluded from analysis.

A listing of all active registered non-religious Canadian charities in 2015, including their websites and categories, was obtained from the CRA. Religious charities were excluded because they make up a large portion of charities in Canada (mostly local places of worship), a small number of Imagine Canada-accredited organizations, and they are unlikely to report impact (Hackett, 2016).

To create the control sample of 381 random non-religious Canadian registered charities:

6 A random number function was used to assign a number to each of the 53,312 active registered non-religious Canadian charities in 2015.

7   The random numbers were sorted from largest to smallest, and the largest 381 numbers were se-
     lected for the sample.

8   Each organization's annual revenue (line 4700) and expenses (line 5100) were copied from their
     2015 T3010 data on the CRA website.

9   Posted annual reports were reviewed following the process outlined below.

The comparison year was selected to be 2015 because it is the most recent year where complete information was likely to be available. Charities have up to six months from their year-end to file their T3010s with the Canada Revenue Agency, and it can take some time after filing for their information to become publicly available. The data for 2016 was not yet available for all charities at the time of writing.

In order to simulate the experience of a typical casual donor or member of the public, only publicly available information was used, and no private, confidential, or by-request-only information was requested, accessed, or referenced. Only the website listed on either the Imagine Canada site or in the CRA data table was accessed; no internet searches were performed to find unlisted or changed websites. At no time were charities informed of data collection.

Locating annual reports on websites was done by browsing the navigation menu; by using a site's internal search function; and through Google-powered site searches using the terms "annual" and "report" (English sites) or "annuel" and "rapport" (French sites). For both accredited and control charities, an annual report labelled 2015 was used whenever possible. In situations where an organization labelled annual reports using the fiscal year (e.g., 2014–2015 or 2015–2016) the 2014–2015 annual report was used. If a report labelled "annual report" could not be found, reports with the same content but different titles were used (impact report, accountability report, report to community, report to donors, victory report, etc.). In a few cases, only one annual report was available from an adjacent year (2014 or 2016) on the website and that report was used. In instances where no annual report from any period at least partially covering 2014, 2015, or 2016 was readily accessible, the charity was rated as not publicly disclosing any measurements.

Annual reports were reviewed against the Table 1 categories of impact measurement. Because information in annual reports was highly variable, an "at least one" threshold was used for each rating; if at least one measurement of a type was observed, then the organization was rated as reporting on that measure. This was necessary because complete information on the number, scope, and intended impact of charities' programs was unavailable, so it was not possible to assess the extent to which published information captured the organization's activities or reflected its performance against intended results.

Reporting on activities that generated inputs—most frequently fundraising and volunteer programs that supported the operations of the charity—were not rated as an impact measurement. This is a rejection of Barbara Legowski and Terry Albert's (1999) classification of donor base diversity, sustainability, and growth as outcomes in fundraising organizations in light of more recent writing that would classify these as measures of organizational capacity (Sawhill et al., 2001) and states, for example, that "the effectiveness of [foundations] depends substantially on the performance of grant recipients" (Tyler, 2013, p. 77).

Some utilization rate measures—such as program wait times and the length of wait lists, average treatment times, and vacancy rates—could not be classified using the Table 1 categories. These were generally ignored for this study. In the case of grant-making organizations, including hospital foundations, reports on granting activity and the purchases of assets for donees were rated as output measurement. Quantitative reports on how the grant was used to support an activity by a recipient were rated as outcome measurement.

The use of testimonials was very common in annual reports, but it was not included in the measurement typology, as it did not include a quantifiable measurement. The exception was where significant research, advocacy, or litigation activities were reported together with the resulting change in legislation, regulation, policy, or practice, in which case this was considered to be both output and outcome measurement (Organizational Research Services, 2007); this is an affirmation of Legowski et al.'s (1999) classification of policy changes and issues as outcomes in advocacy organizations and their classification of changes in knowledge, attitudes, and behaviour as outcomes in prevention/promotion/education organizations.

Because this was a review of publicly reported impact measurement, journalistic work appearing in annual reports—reporting on trends, statistics, progress, or activities within a sub-sector of the organization that was not clearly linked to its own activities—was not counted as reporting impact. Unless evidence of measurement was given, general statements of intended, expected, assumed, or future change or benefit were not rated as reporting impact. Where a consolidated annual report for two related charities (usually an operating charity and a foundation) was the only report available, and where clear reporting on impact measures for the accredited or sample charity was not included, the accredited or sample charity was not rated for reporting impact.

The presentation of financial information was highly varied between annual reports. If only percentages were provided, then the organization was rated as providing proportional financial measures. If, however, enough absolute information was provided to allow a reader to calculate a dollar value from a percentage, then the organization was rated as providing financial accountability metrics. A frequent presentation was a donut diagram with percentages by category and a total revenue or expense number appearing adjacent; given that this presentation appears to be an informal standard, it was rated as financial accountability metrics as opposed to a key performance indicator or dashboard. Where a percentage was clearly labelled as a specific ratio (such as overhead ratio or cost to raise a dollar) the organization was rated as providing key performance indicators.

Information in the notes of financial statements, on other website pages, or in marketing and solicitation materials was not reviewed. Where financial statements were available in a separate document or file from the annual report, the financial statements were not reviewed or rated.

Data coding and analysis was done in Microsoft Excel 2010 using the Real Statistics Resource Pack release 5.2 (Zaiontz, 2017). Chi-squared tests were conducted during analysis because of the categorical nature of the coded data. Cramer's V was calculated to determine effect size because more than two categories were needed to describe reporting behaviour in order to accommodate the wide variety of observed reporting behaviour.

FINDINGS

Hypothesis 1
Imagine Canada accreditation will correlate with a greater public disclosure of program impact through annual reports than occurs among Canadian non-religious charities in general.

Table 2 provides descriptive statistics for both the control and accredited samples and their reporting behaviours. With 47.72 percent of accredited charities reporting impact compared to 4.20 percent of charities in general, support for this hypothesis might appear strong on the surface. However, accredited charities tend to be much larger than charities in general, with the median size of an accredited charity being well beyond the extreme outlier range for non-religious charities in general. To account for size, the samples were both trimmed to the control sample's inter-quartile range for size by revenue (both to remove very small and large charities from the control sample and to remove very large charities

from the accredited population). The trimmed samples produce a difference of 5.35 percent in impact reporting behaviour, which is just outside the calculated margin of error for the control sample as a whole, and is likely within the margin of error for the trimmed sample.

In order to explore the role of organization size for both the control sample and accredited charities, a chi-squared test with *Cramer's V* co-efficient was done. This shows a significant correlation (control *p* value < 0.01; accredited *p* value < 0.01) with a weak effect size (control *Cramer's V* = 0.2695; accredited

Table 2. Descriptive statistics for control sample and Imagine Canada accredited non-religious charities

		Control sample +/- 5%, 19 times out of 20				Imagine Canada accredited non-religious charities		
n =		381.00				197.00		
Min $		–				42,609.00		
Quartile 1 $		13,319.00				1,426,855.00		
Quartile 2 $ (Median)		99,000.00				4,475,863.00		
Quartile 3 $		512,159.00				15,707,511.50		
Max $		449,148,822.00				442,409,845.00		
Inter quartile range $		498,840.00				14,280,656.50		
Extreme outliers $ >		2,008,679.00				58,549,481.00		
Mean $		2,580,101.78				19,282,549.01		

		Full sample	Trimmed to control sample quartile 1	Trimmed to within control sample inter quartile range	Trimmed to control sample quartile 4	Full population	Trimmed to within control sample inter quartile range	Trimmed to control sample quartile 4
n =		381.00	95.00	191.00	95.00	197.00	17.00	180.00
(A) Not reporting	#	347.00	94.00	181.00	72.00	18.00	8.00	10
	%	91.08	98.95	94.76	75.79	* 9.14	* 47.06	* 5.56
(B) Highest reporting is capacity	#	2.00	0.00	1.00	1.00	11.00	3.00	8.00
	%	0.52	0.00	0.52	1.05	* 5.58	* 17.65	4.44
(C) Highest reporting is activity	#	16.00	1.00	8.00	7.00	74.00	5.00	69.00
	%	4.20	1.05	4.19	7.37	* 37.56	* 29.41	* 38.33
(D) Highest reporting is impact	#	16.00	0.00	1.00	15.00	94.00	1.00	93.00
	%	4.20	0.00	0.52	15.79	* 47.72	* 5.88	* 51.67

Note: * difference is greater than margin of error

Table 3. Chi-square test for correlation of organizational size with public reporting by control sample charities

Table 2 control sample	Observed values					Expected values				
	Quartile 1	Quartile 2	Quartile 3	Quartile 4	Total	Quartile 1	Quartile 2	Quartile 3	Quartile 4	
	< 13,319	13,319 - 99,000	99,001 - 512,159	> 512,159		< 13,319	13,319 - 99,000	99,001 - 512,159	> 512,159	
(A) Not reporting	94.00	95.00	86.00	72.00	347.00	86.52	87.43	86.52	86.52	347.00
(B) Highest reporting + (C) Highest reporting is activity	1.00	1.00	8.00	8.00	18.00	4.49	4.54	4.49	4.49	18.00
(D) Highest reporting is impact	0.00	0.00	1.00	15.00	16.00	3.99	4.03	3.99	3.99	16.00
Total	**95.00**	**96.00**	**95.00**	**95.00**	**381.00**	**95.00**	**96.00**	**95.00**	**95.00**	**381.00**
	df	*chi-sq*		*p-value*		*x-crit for 0.00001*		*significant*		*Cramer V*
	6.00	55.35		0.0000000003934		33.11		yes		0.2695

Table 4 - Chi-square test for correlation of organizational size with public reporting by Imagine Canada accredited non-religious charities

Table 2 accedited sample	Observed values					Expected values				
	Quartile 1	Quartile 2	Quartile 3	Quartile 4	Total	Quartile 1	Quartile 2	Quartile 3	Quartile 4	Total
	< 1,426,855	1,426,855 - 4,475,863	4,475,863 - 15,707,511	> 15,707,511		< 1,426,855	1,426,855 - 4,475,863	4,475,863 - 15,707,511	> 15,707,511	
(A) Not reporting	12.00	2.00	4.00	0.00	18.00	4.57	4.48	4.48	4.48	18.00
(B) Highest reporting + (C) Highest reporting is activity	24.00	24.00	21.00	16.00	85.00	21.57	21.14	21.14	21.14	85.00
(D) Highest reporting is impact	14.00	23.00	24.00	33.00	94.00	23.86	23.38	23.38	23.38	94.00
Total	**50.00**	**49.00**	**49.00**	**49.00**	**197.00**	**50.00**	**49.00**	**49.00**	**49.00**	**197.00**
	df	*chi-sq*		*p-value*		*x-crit for 0.0001*		*significant*		*Cramer V*
	6.00	27.95		0.0000959675999		27.86		yes		0.2664

Table 5. Chi-square test for correlation of Imagine Canada accreditation with public reporting controlling for organizational size

Table 2	Observed values			Expected values		
	Control sample quartile 4	Accredited trimmed to control quartile 4	Total	Control sample quartile 4	Accredited sample to control quartile 4	Total
	> 512,159	> 512,159		> 512,159	> 512,159	
(A) Not reporting	72.00	10.00	82.00	28.33	53.67	82.00
(B) Highest reporting + (C) Highest reporting is activity	8.00	77.00	85.00	29.36	55.64	85.00
(D) Highest reporting is impact	15.00	93.00	108.00	37.31	70.69	108.00
Total	**95.00**	**180.00**	**275.00**	**95.00**	**180.00**	**275.00**

df	chi-sq	p-value	x-crit for 0.00001	significant	Cramer V	
2.00	146.99	0.0000000000000	23.03	yes	0.7311	

Table 6. Chi-square test for correlation of typical-sized Imagine Canada accredited non-religious charities with accreditation status during period under study

Table 2	Observed values			Expected values		
	within Imagine Canada accredited inter quartile range 1,426,855 – 15,707,511.50			within Imagine Canada accredited inter quartile range 1,426,855 – 15,707,511.50		
	Accredited up to December 31, 2015	Accredited from January 1, 2016	Total	Accredited up to December 31, 2015	Accredited from January 1, 2016	Total
(A) Not reporting	5.00	1.00	6.00	3.92	2.08	6.00
(B) Highest reporting + (C) Highest reporting is activity	25.00	18.00	43.00	28.06	14.94	43.00
(D) Highest reporting is impact	32.00	14.00	46.00	30.02	15.98	46.00
Total	**62.00**	**33.00**	**95.00**	**62.00**	**33.00**	**95.00**

df	chi-sq	p-value	x-crit for 0.1	significant	Cramer V	
2.00	2.20	0.3324938424636	4.61	no	0.1523	

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Table 7. Impact reporting as percentages by Table 1 by category by size (measured by revenue) compared to other studies

Size by revenue by table 2 quartile			Control sample					Imagine Canada accredited non-religious charities					Hall et al. (2003)	Salamon et al. (2010)	Schmitz et al. (2012)	Phil. Fdns Canada (2017)
			Total	1Q <13,319	2Q 13,319-99,000	3Q 99,000-512,159	4Q >512,159	**Total**	1Q <1,426,855	2Q 1,426,855-4,475,863	3Q 4,475,863-15,707,511	4Q >15,707,511				
n =			381.00	95.00	96.00	95.00	95.00	197.00	51.00	48.00	49.00	49.00	1965.00	340.00	152.00	54.00
Do not measure/report (%)			**91.08**	98.95	98.96	~ 90.53	~ 75.79	**9.14**	23.53	~ 4.17	8.16	~ 0.00	23.00	15	–	–
Perform-ance (%)	Capacity	Adherence to service-delivery quality standards	**0.26**	0.00	0.00	0.00	1.05	**1.02**	1.96	0.00	0.00	2.04	–	–	–	–
		Participant related measures	**3.94**	0.00	0.00	5.26	10.53	**23.86**	17.65	35.42	~ 28.57	~ 14.29	–	–	–	48.00
	Activity	Program output measures	**8.40**	1.05	1.04	8.42	23.16	*** 83.76**	60.78	* 93.75	* ~ 85.71	* 95.92	76.00	81.00	–	61.00
		Satisfaction	**1.84**	0.00	0.00	2.11	5.26	**12.18**	9.80	16.67	~ 10.20	12.24	66.00	74.00	–	–
	Impact	Outcome measures	**4.20**	0.00	0.00	1.05	15.79	*** 46.19**	27.45	* 45.83	* 48.98	* 63.27	66.00	58.00	42.80	45.00
		Social auditing	**0.00**	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	–	–	–	–
		Benchmarking	**0.52**	0.00	0.00	0.00	2.11	**0.51**	0.00	0.00	2.04	~ 0.00	–	44.00	–	27.00
		Random assignment comparisons	**0.00**	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	–	7.00	–	–
Financial (%)	Capacity	Proportional financial measures	**0.79**	0.00	1.04	~ 0.00	2.11	**10.15**	7.84	14.58	~ 10.20	~ 8.16	–	–	–	–
		Financial accountability measures	**4.72**	0.00	0.00	3.16	15.79	*** 65.99**	50.98	* 60.42	* 73.47	* 79.59	54.00	–	55.90	73.00
		Key performance indicators	**0.52**	0.00	0.00	0.00	2.11	**8.12**	7.84	~ 6.25	~ 2.04	16.33	–	50.00	–	–
	Activity	Multidimensional scorecard	**0.00**	0.00	0.00	0.00	0.00	**3.05**	0.00	0.00	2.04	10.20	–	17.00	–	–
	Impact	Benefit/cost ratios	**0.00**	0.00	0.00	0.00	0.00	**2.54**	0.00	4.17	~ 0.00	6.12	–	29.00	–	–
		Social rate of return measures	**0.00**	0.00	0.00	0.00	0.00	**0.51**	0.00	0.00	2.04	~ 0.00	–	10.00	–	–

Note: * result greater than past studies; ~ decrease as organizational size increases

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Cramer's V = 0.2664) between an organization's public reporting of impact and its size by revenue (see Tables 3 and 4). Interestingly, the effect size is quite close between samples, which suggests that the proportionate effect of revenue on public reporting might remain stable as organizations grow.

In order to control for organizational size, an additional chi-squared test with *Cramer-V* co-efficient was done for just those organizations in the fourth quartile of the control sample in Table 2, as this is where the gap in behaviour between the control charities and the accredited charities appears to widen. Table 5 demonstrates that accreditation has a significant (*p* value < 0.01) and strong (*Cramer's V* = 0.7311) effect on reporting behaviour for the largest charities.

In order to take a rough look at whether it is accreditation itself or some other factor that might be causing the difference in reporting behaviour between large control charities and accredited charities, Table 6 looks at the correlation between accreditation status and public reporting. This is done by segmenting accredited charities by accreditation date using a chi-squared test and splitting the accredited charities into two samples: those accredited prior to December 31, 2015, representing those charities that were either accredited or substantially through the accreditation process at the time that their annual report was published, and those accredited from January 1, 2016, onward, whose annual reports were unlikely to have been directly influenced by accreditation requirements. There is no significant correlation (*p* = 0.33) be-tween those charities that were accredited (or that were substantially through the accreditation process) and those charities accredited after the period under study. This suggests that while accreditation and public reporting correlate, accreditation itself may not be a factor in an organization's public reporting, and there may be some other factor underlying both accreditation and reporting behaviours.

Given all of this, Hypothesis 1 is supported for charities with annual revenues of greater than $512,159, but not for smaller organizations. The determinants of the correlation are not clear from this study.

Hypothesis 2
Imagine Canada accreditation will correlate with rates of public disclosure of program impact that are less than the rates of impact measurement found in earlier self-reported studies.

As shown by the observed rates of impact reporting by sample and organization size (see Table 7), program outcome measurement is greater for mid-sized (second and third quartile) accredited charities than two out of four earlier studies, and greater for the largest (fourth quartile) accredited charities than any earlier studies. Program output reporting is greater for all but the smallest (second quartile and larger) accredited charities than any earlier studies. Financial ac-countability measures are greater for second quartile charities than in two out of three past studies and greater for larger than median charities than any past studies. These three areas of measurement (outcomes, outputs, and financial ac-countability measures) are also the most frequently reported measures in annual reports for accredited charities. As a result, Hypothesis 2 is unsupported, as it appears that accredited charities are engaging in some forms of reporting at rates higher than in self-reported studies. However, similar to Hypothesis 1, this is more the case for larger charities than for smaller charities.

Hypothesis 3
Within accredited organizations, size as measured by annual revenue will correlate with more rigorously measuring and publicly disclosing program impact.

Referring to Table 7, the public reporting of all measurements increases with the size of the organization (12 of 14 mea-sures increase from quartile one to quartile two, eight of 14 increase from quartile two to quartile three, 10 of 14 increase

from quartile 3 to quartile four) in almost all cases. Decreases in rates are largely in third-quartile accredited charities in measurements of capacity and activity, with rates of financial accountability increasing at the same level and impact measures increasing moderately. Possibly, this might be around the size where organizations have the capacity to shift their organizational narrative from one based on activity measures to one based on impact measures, or where they are able to become more sophisticated in their financial management. This connects back to the results in Table 4, which were discussed in connection with Hypothesis 1, that show a significant correlation between size and public disclosure with a weak effect size.

Oddly, even though client satisfaction surveys are one of the easiest methods of evaluating impact, and are quite common (Hall et al., 2003; Salamon et al., 2010), if they are being used, Canadian organizations rarely publicly report the results. Overall, there appears to be support for Hypothesis 3, with the caveat that the differences between quartile two and quartile three accredited organizations might be worth a further look in the future.

DISCUSSION

Returning to the question of the extent to which the trends of accreditation and impact reporting are convergent and whether accreditation contributes to increased impact reporting, the answer seems to be that accreditation and impact reporting converge as organizational size (measured by revenue) increases, but that it does so because of an unknown factor, not because of accreditation itself. From these findings, a general conclusion can be drawn that capacity matters, with organizational revenue being one element of capacity. Other, undetermined, elements of capacity for measurement and disclosure are likely more present in Imagine Canada-accredited charities than in non-religious charities in general, with accreditation being a consequence of those elements.

The most common publicly reported impact measures are output measurements, which are generally insufficient for describing impact. This may be an ongoing consequence of the confusion between outcomes and outputs. The next most common is outcome measures, with just 46.19 percent of Canadian charities with a demonstrated capacity and interest in improving their management and governance practices reporting on outcomes. However, only 4.20 percent of the control sample did any impact reporting.

These findings generally affirm earlier research that correlates organizational size (measured by revenue) with impact measurement, adding that the effect is weak. The observed differences between accredited charities, not-yet-accredited charities, and non-accredited charities also suggest that there may be additional factors underlying the public reporting of impact. The common factor between the public reporting of impact and Imagine Canada accreditation may be organizational paradigms that see evaluation as an activity with a broad audience that influences the opinions of widely defined stakeholder groups. Intuitively, it seems logical that both are products of organizational cultures, philosophies, and systems that are attentive to and seek to manage public reputation.

These findings are an outside review of behaviour using large samples, including a simple random control sample, instead of the self-reported information collected from a smaller sample frame. This study also applied consistent definitions to ratings of whether organizations were reporting impact, instead of relying on the subjective, internal understandings of research subjects.

CONCLUSIONS

This study did not measure trust directly, rather it looked at accreditation and information-sharing behaviours that others have shown are likely to increase trust in charities. In general, Canadian charities are not sharing impact information for

the public to evaluate them on, which the public itself is saying it wants to see. This may be because of the costs and barriers associated with measurement, or it may be because measurement is happening but the results are being withheld. Either way, it is a missed opportunity to build trust with the public. Counter to this, accredited organizations, especially the larger ones, are taking advantage of this opportunity and are publicly reporting on their impacts at levels much higher than Canadian charities in general and at rates higher than previous self-reported studies have found. Accreditation does not, however, appear to be causing this behaviour. While accreditation may be achieving its other goals of improving the efficiency, effectiveness, and transparency of management and governance in Canadian charities, it is not appropriate to say that it leads to greater impact. There is undoubtedly a correlation between the public disclosure of impact and accreditation, but the relationship between the two is unlikely to be causal and the determinants still need to be found. In order to further explore the correlation between accreditation and public reporting, longitudinal data should be gathered to determine if one generally precedes the other, with the results of this study suggesting that public reporting of impact likely precedes accreditation. Future research could also examine accreditation and public reporting in light of paradigmatic or cultural models.

Other questions raised for future researchers include: what specific capacities help organizations do impact reporting and seek accreditation, and do these vary by size or sub-sector? Are charities doing measurement that they are choosing not to report on, and if so, what is keeping them from sharing their results? And, is impact reporting really all that the sector expects it to be—do organizations that engage in more reporting generate more support because of it?

Limitations
Ratings were subjective and done by a single person; while attempts were made to be consistent, it is possible that ratings were consistently biased for or against certain types of measurements or presentations of information. Because an "at least one" threshold was used, it really was just one measure of one program among many for some charities, so the decent percentage of accredited charities reporting outcome measures (46.19 percent), for example, should not be taken as an indication that that many organizations are making wide use of outcome measurement. There were no checks on quality or validity of reported impact; organizations were taken at their word that they had achieved the results they reported. This study assumed a positivist, qualitative approach to impact measurement and reporting. Many organizations used feedback statements, testimonials, and profiles in their annual reports to illustrate impact; given the wide variety of formats, content, and context these could not be consistently rated as reports of impact and were ignored.

Sampling and data collection were affected by the CRA charities listings in a number of ways: the list supplied by CRA for 2015 included ten charities registered sometime after that tax year; data supplied by charities to the CRA was incomplete; and registered charity categories appear to relate more to purpose at time of registration and less to current activities so segmenting based on CRA category was not as useful as initially thought, and a planned segmented analysis based on registered category was abandoned.

While Imagine Canada accredited charities were required to have at least the three most recent years of annual reports on their websites at the time of accreditation to be compliant with "Standard B10" (Imagine Canada, 2014, p. 7), sixteen did not have them available at the time of this study, which is likely the result of compliance slippage.

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Canada Revenue Agency, https://www.canada.ca/en/revenue-agency/services/charities-giving/charities-listings.html

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Shared Platforms as Innovative Support for Small Nonprofit Organizations: Toronto Case Study Evidence

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ABSTRACT

This research examines the structure, organization, and evolution of the shared platform, an innovative organizational structure intended to assist the capacity concerns of small nonprofits. The grounded and exploratory inquiry of multiple participants in a shared platform organizational community in Toronto shows that there are two distinct variants of the shared platform, and that the evolution of an administrative form to a community development form of shared platform occurred through a process of field-level bricolage.

RÉSUMÉ

Cette recherche examine la composition, l'organisation et l'évolution de la plateforme partagée, une structure organisationnelle innovatrice conçue pour aider les petites associations sans but lucratif qui se soucient de leurs limites de capacité. Cette enquête ancrée et exploratoire de participants multiples dans une communauté organisationnelle à plateforme partagée à Toronto montre qu'il y a deux variantes distinctes de la plateforme partagée, et que son évolution d'une forme « administration » vers une forme « développement communautaire » s'est effectuée par un processus de bricolage sur le terrain.

Keywords / Mots clés Small nonprofit; Shared platform; Innovation; Bricolage / Petite association sans but lucratif; Plateforme partagée; Innovation; Bricolage

INTRODUCTION

All nonprofit organizations have to deal with multiple challenges, but the challenges that small nonprofits face are particularly acute (Wollebæk, 2009a, 2009b). Small nonprofit organizations typically have both more significant resource issues than comparable larger nonprofits (Jaskyte, 2013), as well as broader issues of administrative and organizational capacity (Kapucu, Healy, & Arslan, 2011).

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Multiple aspects of social innovation can be deployed to help small—and young and less formally structured (Horton Smith, 1997)—nonprofits learn to manage environmental complexity and succeed. The types of social innovation small nonprofits turn to in response to their endemic challenges form a kind of patchwork typically ranging from the transformation of a service delivery model (i.e., how the organization or its agents provide mission-relevant services to clients and to community), to the efficiency and effectiveness of the underlying organizational infrastructure (i.e., the administrative and back-office structures of accounting, finance, funder relations, human resources [HR], management, etc.) (Shier & Handy, 2014). Both of these aspects of social innovation can help small nonprofits to bridge their functional and structural limitations.

One model of structure-focused social innovation that has emerged in recent years in the Canadian nonprofit context is the "shared platform" (SP) (Dart, 2016; Marsland, 2013; McIssac & Moody, 2013; Stevens & Mason, 2010). The shared platform is a multi-organizational structure in which multiple nonprofit organizations that would otherwise be small separate organizations—often called "projects" in the SP context—collectively delegate multiple organizational functions to a central administrative hub—often called a "platform hub" in the SP context—as a way to be free to focus more intensively on mission-related interventions and activities.

In the SP model described in its small literature (e.g., Marsland, 2013), the platform hub becomes large and sophisticated enough to become more efficient than is possible in small nonprofits, where a small number of necessarily generalist staff must perform both service delivery and administrative roles. Administrative efficiency occurs in the SP through the scaling and specialization that comes by providing similar services (e.g., HR, grant administration, bookkeeping) to multiple small organizations. This innovative structure is intended to improve both front-end charitable-mission effectiveness through freeing up focus in the projects and also back-end administrative efficiency through scaling and specialization. It is, therefore, not a surprise that the SP model has been highlighted as a potential innovative solution (Stevens & Mason, 2010), particularly for the problems of small and community-based grassroots nonprofits (Horton Smith, 1997).

Although there is considerable interest in the SP model among practitioner and policy communities, actual detailed research on the nature, dimensions, processes, and outcomes of SP experimentation is limited. Basic empirical research is lacking on the workings of the SP model and the manners in which it adapts to and emerges within applicable contexts.

This article examines the structure, function, adaptation, and emergence of the shared platform structure after it was introduced in the nonprofit organizational community in Toronto, Canada. The article draws on the concept of bricolage (Stinchfield, Nelson, & Wood, 2013) to conceptualize the elements driving the dynamic fit of the initial shared platform concept in the specific settings of Toronto's nonprofit environment. This research is predicated on the need to understand the functioning, challenges, and evolution of the SP model as a way to develop some clarity about its potential wider value as a capacity-building support for small nonprofit organizations. This research also provides an empirical foundation for future research that would enhance the theoretical underpinning and application of the SP concept.

LITERATURE REVIEW

The theoretical foundations of the SP model have multiple connections to organizational and nonprofit theory. Since this study is predicated on the need to understand the structure, function, adaptation, and evolution of SPs, and the potential value that such structural arrangements might have for small nonprofit organizations, the literature on shared platforms, the capacity issues of small nonprofit organizations, and bricolage is particularly relevant. Together, these conceptual backgrounds help to focus on the most salient features of the shared platform narrative. First, this article provides an overview of SPs.

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SHARED PLATFORMS

Shared platforms are part of a family of what are regarded as "complex nonprofit structures" (Kerlin & Read, 2010), which are collectively intended to be particularly relevant in small nonprofits, which have limited organizational capacity. There have been multiple innovations intended to improve the capacity of small nonprofits. Studies of "shared services" (Proulx, Hager, & Klein, 2014; Walsh, McGregor-Lowndes, & Newton, 2008) have highlighted examples in which nonprofit organizations integrate functions with varying degrees of formality and intensity. In several jurisdictions, there are reasonably well-established traditions of "fiscal sponsors," "trusteeships," and "incubators" in the nonprofit sector (Andersson & Neely, 2017; Essig, 2014). Here, a larger, incorporated, and more established nonprofit with more professionalized administrative systems can typically manage funds and administration and even serve as the formal incorporated charitable entity, for smaller and newer organizations that may or may not be formally incorporated. These arrangements are typically shorter term in duration to help a new organization to develop and stabilize its initial operation.

The shared platform is intended as a type of social innovation for small nonprofit organizations that combines the functions (legal, policy, administrative, mission, strategic, and innovation) of all of the types mentioned above (Jurbala, 2012; Marsland, 2013; McIssac & Moody, 2013; Wright & Witt, 2016). See Figure 1 for a depiction of the typical shared platform.

Figure 1. Shared platform overview
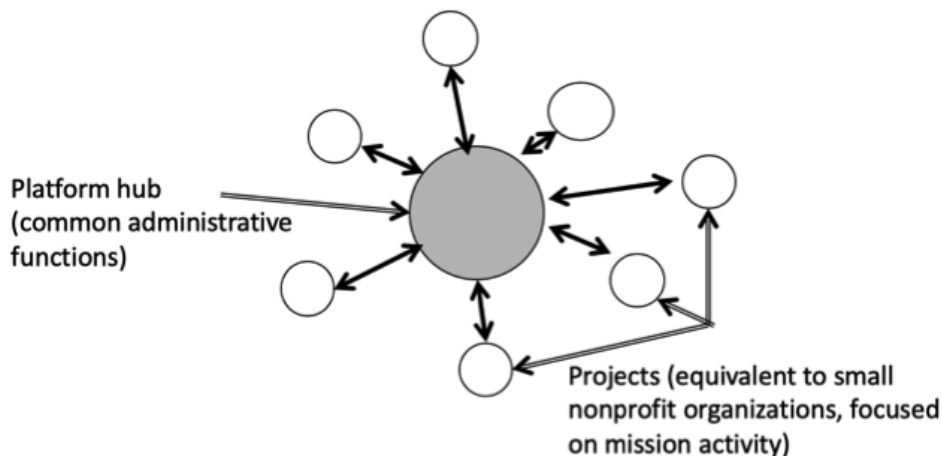
In the Canadian context, the structure has been distinguished from what is regarded as more distinctly American models of fiscal sponsorship and trusteeship (Stevens & Mason 2010). As will be described, the shared platform is a significantly more comprehensive model than others proposed or explored thus far.

While there are several definitions of shared platforms in Canada, underlying them is the description by David Stevens and Margaret Mason (2010) that this structure is intended to be "a new[1] infrastructure model for registered Canadian charities" (p. 98), and particularly for smaller ones. The Ontario Nonprofit Network characterizes the SP structure as one that enables smaller nonprofits to share capacity, to support emergent leadership in the sector, to foster social innovation, and to improve funding outcomes (Wright & Witt, 2016). Similarly Jane Marsland (2013) describes them as "charitable, nonprofit organizations that assume control and responsibility for projects with charitable purposes initiated by individuals with no prior formal relationship with the organizations. This allows these projects to access charitable sector financial support and cost-effective professional administrative expertise" (p. 7). The model is essentially a multifaceted organizational division of labour wherein a shared incorporated entity is a legal and administrative platform or hub for multiple actors and projects, enabling participating actors to better focus on mission-related pro-social action. It is not intended as a short-term or temporary arrangement.

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There are a number of fundamental aspects of the shared platform structure. The first is that the core of the shared platform, the "administrative hub," is a purpose-built entity with an explicit focus on providing the foundational administrative services for multiple and diverse projects. It is also the legally incorporated entity, thus precluding the need for multiple small initiatives to incorporate separately. The second is that "projects" in the SP context, are activity-focused entities that normally begin outside the platform as pre-organizational initiatives and are housed legally and administratively within the overall SP entity. The third is that the purpose of the SP structure is to better enable social and environmental action by taking away much of participants' administrative burden and allowing them to instead develop their pro-social action. "The exciting thing is that people who are passionate about their cause, can focus on it and don't have to manage the operations alone" (Witt, quoted in Jurbala, 2012, p. 287). The possibilities for better-quality administrative function and fewer distractions from pro-social action are intended to stand in contrast to the typical experience of small nonprofit organizations.

SMALL NONPROFIT ORGANIZATIONS

The problems that shared platforms are deployed to address are those characteristic of small nonprofit organizations. Small organizations and their challenges have been a longstanding concern in organization theory. Allen Bluedorn (1993) provided the most systematic review of the literature on organizational size, summarizing the research in organizational theory that centred on the work of Peter Blau (1970, 1972). Among other findings, multiple sources demonstrated that compared with larger organizations, smaller organizations are less formalized and systematized, and they need to spend a higher proportion of total resources on administration. In population ecology literature, it has long been noted that organizational mortality rates tend to decline with increased organizational size (Freeman, Carroll, & Hannan, 1983). This research has carried into the nonprofit sector.

It is widely believed that small nonprofit organizations commonly have significant capacity issues (Kapucu, Healy, & Arslan, 2011), similar to those documented in for-profit businesses. Studies (Jaskyte, 2013; Svennson, Andersson, & Faulk, 2018) have found that size increases are related to both capacity and innovation in nonprofit organizations. Studies that focus specifically on small nonprofits (Kapucu, Healy, & Arslan, 2011; Schneider, 2003) describe fundamental capacity issues with these smaller nonprofits. The particular issues described in small nonprofits—inadequate resources, the lack of specialized administrative staff, underdeveloped infrastructure—have been described as the "nonprofit starvation cycle" (Goggins Gregory, & Howard, 2009; Lecy & Searing, 2015). In this reinforcing cycle, fundamental capacity issues undermine an organization's ability to develop, resulting in a cycle of low capacity and low performance. Given the widespread nature of both this experience and the related concerns, it is not surprising that experimentation is occurring to create structures that help smaller nonprofits with these issues.

BRICOLAGE

Making sense of the particular deployment of SPs requires a concept to focus attention on the processes by which this new innovative structure are specified and enacted in a particular context. The concept of bricolage provides a valuable insight in this regard.

Bricolage is an improvisational process that involves "making do by applying combinations of the resources at hand to new problems and opportunities" (Baker & Nelson, 2005, p. 333). It is based on the notion that whatever resource is at hand could be deployed for new purposes, opportunities, or for future use (Baker & Nelson, 2005; Di Domenico, Haugh, & Tracey, 2010; Levi-Strauss, 1968). Bricolage is characterized by resourcefulness in action (Di Domenico, Haugh, & Tracey, 2010). While it is yet to be explicitly emphasized in the literature, bricolage has multiple connections to institutional entrepreneurship (Maguire, Hardy, & Lawrence, 2004) and the creation of new "proto-institutions" (Lawrence, Hardy, & Philips, 2002). Bricolage includes the conscious attempts of actors to engage the resource limitations and contextual

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limitations imposed on them (Baker & Nelson, 2005). Ted Baker and Reed Nelson (2005) suggested that bricoleurs put in substantial effort to challenge the constraints or issues of an existing system. In this article, the particular problem considered in terms of bricolage is the nexus of capacity issues experienced by small nonprofits.

Bricolage is consistent with the core message of the paradox of embedded agency (Sewell, 1992; Seo & Creed, 2002). The organizational actors with a low level of embeddedness are the bricoleurs who see the opportunities to create new institutions or significantly alter current normative practices. This, in effect, triggers a process of mix and match, trial and error, improvisation, do-it-yourself, and an intense creative combination of resources to make something better out of the resources and opportunities at hand (Baker & Nelson, 2005). This process is definitional to bricolage.

This article proposes that the activities of the organizational actors involved in shared platforms are indicative of the creation of an innovative SP structure. This structure deploys bricolage as an improvisational tool for both reorganizing and redeploying the resources and organizational frameworks required to support its operation and mission. As social entrepreneurs, they are bricoleurs motivated by the goal to address local social needs, i.e., the capacity issues of small nonprofits, within their areas of expertise and that they could acquire resources to solve (Zahra, Gedajlovic, Neubaum, & Shulman, 2009). This analysis will show that the creation and evolution of the SP organizational structure is indicative of the ability of the players to identify opportunities and translate small-scale local opportunities into problem-solving modifications.

METHODS

This study was exploratory (Neuman, 1994) and is part of a larger study looking at various organizational and strategic issues in the shared platform community in and around Toronto. To uncover the enacted and lived experience of working in SP contexts, a grounded qualitative inquiry was designed. Between January and July 2015, a variety of platform and project staff and some other platform participants from a number of Toronto-area platform organizations were interviewed. The interviews were semi-structured and open-ended (Kvale, 1996; McCracken, 1988). In a very deliberate way, the focus of the interviews was to access descriptions of the day-to-day operating reality of those working in and around SPs and the factors driving their structure, function, and evolution. The research intention was that this would allow the creation of an accurate understanding of the SP model in practice.

As described in the literature review, the SP population is small and relatively new. Thus there was a small and finite number of organizations and practitioners to consider for inclusion in this study. Although, there was no official directory or list of SP organizations in Toronto, there was an informal network of many of the practitioners and affiliated organizations. Snowball sampling allowed for the creation of a working list of potential participants. Some of the platform-containing organizations had budgets of over CDN$1 million per year, though most of the SP units were based around two to three full-time staff in the administrative hub itself and 10 to 20 projects supported by each platform. The number of paid staff and/or participants in the projects was highly variable between platform organizations, and highly changeable even within a particular platform.

Participation in this research was voluntary and was solicited through network connection with the active SP "community of practice" (Brown & Duguid 1991), including present and former staff and project participants, funders, policy actors, researchers, et cetera, in Toronto. The organizational population—approximately 10 organizations at the time of research, including one that was defunct but had participants still involved in the network—was also contacted by email for annual reports or anything that might give an overall description of the organizations and their projects. Websites were also used to assist with this familiarization.

Twenty-one interviews (covering fifteen separate participants) and multiple less-formal conversations were conducted with members from eight different SP organizations. The transcripts from these interviews were combined with notes from the print and web materials that were collected, and notes from site visits and informal conversations. These produced

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the textual foundation for the data analysis. Data analysis was undertaken using N-Vivo, a qualitative data analysis software tool used for data management, coding, sorting, and retrieval. Open coding was carried out inductively as a means to develop theoretical/conceptual models on an endogenous basis (Denzin & Lincoln, 1994). An inductive approach was used and as a result of the open-ended and endogenous coding and theory building, patterns emerged from the analysis that proved analytically relevant. Given the purposes of this research, coding paid particular attention to issues relating to platform structure, function, and change.

FINDINGS AND ANALYSIS

The data analysis suggests that there are four major themes relevant to the research objectives: a) there are, in fact, two distinct varieties of SP united by a consistent underlying model; b) the Administrative Shared Platform (ASP) variety of SP is designed to support projects that behave in the manner of small and innovative nonprofit organizations. These projects are supported by the hub based on the belief that the projects are the means through which the whole organization achieves its mission; c) the Community Development Shared Platform (CDSP) variety of SP is designed to support much more preliminary, informal, and transient projects, and the hub regards these projects and their participants as a mission ends in themselves; and d) the CDSP model evolved from the ASP model in the Toronto nonprofit environment through a process of staff and information mobility and improvisation, and a networked community of practice.

Two varieties of shared platform
The data analysis suggests that there are two distinct varieties of SP in the Toronto organizational community united by a common underlying model. Figure 2 illustrates the elements of the underlying model.

Figure 2. Shared platform structure and evolution
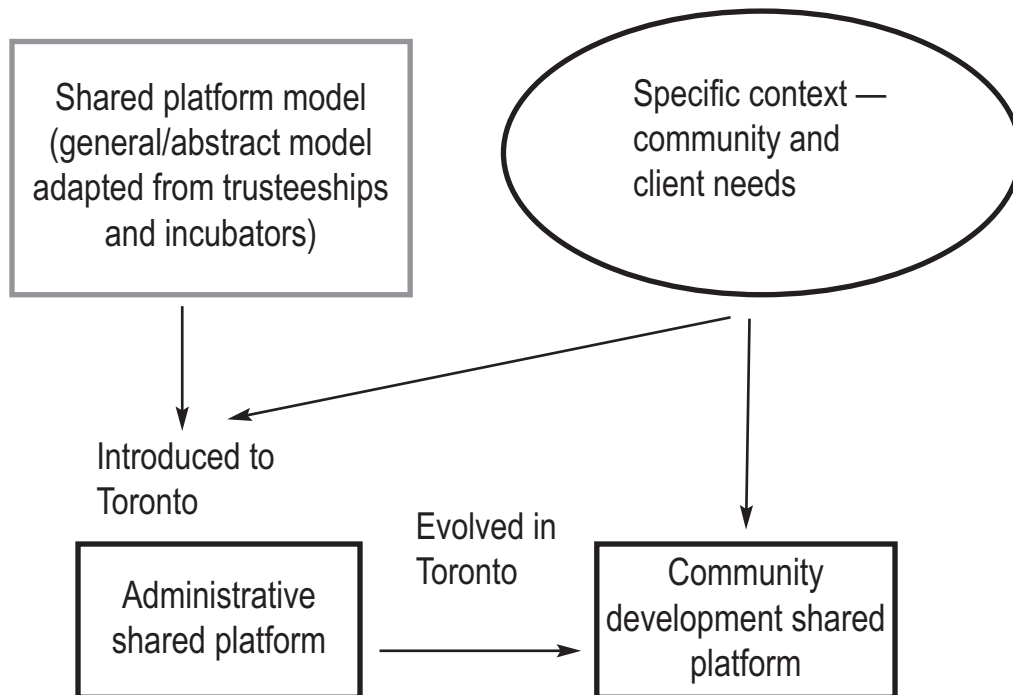
The particular variations of the model evidenced in the ASP and CDSP are described in Table 1 and developed through eight separate categories.

Table 1. Shared platform models: Characteristics, structure, and relationships

Characteristics	Administrative SP model	Community development SP model
Main goal	Provide primarily administrative support to projects.	Provide primarily mentorship and developmental support to participants and their projects.
Desired outcomes	Support projects to have social and environmental impact in line with platform mission.	Support projects and their participants to develop higher capacity as they develop new community activities and interventions.
Typical project (at start)	Well-established early stage project. Some funding. Small emerging nonprofit.	A start-up or pre start-up. An emerging community project or intent to create one, or even an interested high-potential individual
Organization structure of projects	Relatively formalized and professionalized, similar to an unincorporated small nonprofit or an organization department.	Relatively informal, fluid, or proto-organizational, a project, a group, an initiative, a work-in-progress.
Project staff/participants	Social innovators, aspiring to be full-time employees. Project staff are often from formally educated, professional, and organizational perspectives.	Prospective community leaders, social innovators, new voices, and practitioners "from the margins." Participants are often from non-formal and nonprofessional perspective.
Budget of individual project	Relatively large compared to CDSP, e.g., $100,000 annual minimum budget.	Relatively small compared to ASP, often one small short-term grant, frequently $10,000 or less.
Relationship modality between platform hub and project	Administrative and functional, transactional, relatively routine.	Multifaceted mentorship and interpersonal support, as well as administrative. Less routine.
Financial model of platform	Fees from projects can potentially cover most/all ASP hub costs. Projects pay platform 10 percent of total budget. External funding is potentially not necessary.	Fees from projects amount to marginal/nominal contribution to CDSP hub costs. Projects normally pay platform 10 percent of total budget. External funding is necessary and ongoing.

Note: Each platform variety is comprised of a distinct pattern of platform hub/project relationships, structure, and activities, and a financing structure/funding model.

Differentiating the two varieties of platforms was the single-most surprising finding from the empirical research and was not anticipated from pre-research meetings and discussions with the practitioner community. The first version of SP documented in the data is described as an ASP. This kind of platform organization is mostly consistent with the descriptions of SPs in the literature and is what previous literature would have referred to simply as a shared platform.

The second version of SP is described as a CDSP; it is more common in Toronto. A CDSP has goals, structures, and behaviour that differentiate from an ASP in many ways, though it is still clearly recognizable as a shared platform structure. The ASP was the earlier model in the Toronto organizational community. The data show that the CDSP evolved as a variant of it when deployed in a distinct organizational context.

Table 1 describes the two SP varieties as organized collections of structures, practices, and relationships along eight separate categories. These varieties are derived from the awareness of a specific mission focus, target client groups, and idiosyncratic environments.

In the broadest terms, data from the interviews indicate that the task of the ASP is to support relatively professionalized and relatively sophisticated smaller organizations that have the potential for a wide scope. In contrast, the task of CDSP

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organizations is more focused on less formal grassroots and local neighbourhood settings, with an emphasis on individuals and small groups in the social and economic margins. Here, the environment is much more geared to social inclusion and social engagement projects.

The data also show that while the two models share a focus on project service and support, they differ on what that means in operational terms. This is because the types of projects they serve are quite different. The ASP is primarily focused on administrative services for more established projects as a way to allow the projects the time and opportunity to focus on their own social and environmental mission and interventions. The ASP focus is centred on high-quality administrative support. In contrast, the CDSP is described as much more "hands on" with its projects, which are at an earlier stage and initiated by individuals and groups more outside of the nonprofit and professional mainstreams. Its primary modality would be described as multifaceted and foundational support, including administrative services, that broadens to help with a wide array of elements of project, personal, and interpersonal development.

The Administrative Shared Platform model
As shown in Table 1, the overall model of the ASP was built around the specific characteristics and needs of the particular "clientele" it was established to serve.

The thick description of the ASP model in this section came from one single example in the Toronto SP community. The scarcity of ASPs was surprising, given the research implicitly sought this particular model and it is the model the literature describes. Members of the informal SP network were not aware of other platforms in Toronto that operated in the manner of an ASP.

The target client of the ASP model is explicit and specific. The ASP model was created to benefit and serve the projects of emerging leaders and professionals who seek to create important large-scale impacts on compelling social and/or environmental issues. Most project leaders had formal postsecondary educational experience, and many had professional nonprofit organizational experience. One research participant differentiated the focal client groups from nonprofit "start-ups."

> I wouldn't call them start-ups but sort of early stage social change projects … so projects that are maybe coming off of a first grant that sort of established their work … [Our role is to help with] re-thinking those projects and supporting them into a system whereby they are able to become more sustainable and scale their work. (Interviewee G)

The kinds of projects found in an ASP structure were those that could in another context be good examples of highly capable small nonprofits with committed, longer-term professional staff. Projects were designed and intended for longer-term sustainability, and the aspirational language of "scaling" activity and impact was widespread. Administrative Shared Platform projects described their intentions to develop significant funding for their activities and described having at least initial grant funding already secured. They had a minimum (floor) annual budget of $100,000 per annum as a precondition for participating in the ASP.

The platform of the ASP is constructed to deliver the primary goal of the ASP hub model, which is to provide professional and cost-effective administrative support to projects, so the projects themselves can focus on achieving the compelling social or environmental outcomes for which they have been created. This model was in part premised on a division of labour between platform and project, and it delineated the principal characteristic of the platform in the ASP (see "Relationship modality" in Table 1). One participant from an ASP project noted that they "have very little personally to do with the platform other than things like HR matters" (Interviewee C). The platform/project relationship was described as

"quite transactional" (Interviewee K). Human resources, accounting, and funding applications/reporting were the most common administrative task areas that were described as important service provision roles of the platform hub.

The division of labour between the platform hub and the project in the ASP is unconventional outside of the SP community. One participant described the distinctive and uncommon organizational model through an analogy, as "operating much like a publishing company or a record label" (Interviewee G). This describes the manner in which a record label, for example, covers many of the important professional administrative and back-office functions, while the "talent" in the projects focuses on whatever area it is they are motivated to.

> My usual description of a shared platform is that we accomplish our work in the world by bringing on projects that meet our charitable mandate … we understand that there are great ideas out there that are going to help to propel our work forward, and so what we do is we absorb those projects into our corporate entity and support them by putting them into an operations apparatus that is essentially ready to go and fully structured. (Interviewee G)

The "operations apparatus" that served and supported the projects of the ASP was described as somewhat standardized across projects to enable simplicity, for example, an online accounting and HR form submission. The platform hub staff were organized both horizontally (i.e., project officers who provided multiple services and liaison with multiple projects) and vertically (i.e., some specialist staff who focused on distinct administrative functional areas). This structure led to a day-to-day operating context that was frequently described as relatively smooth and satisfactory. Consider the following description of how an ASP platform hub supported a project's grant application and reporting functions.

> [ASPA] takes it on and they do a lot of stuff around grant applications, which frankly is absolutely fantastic, honestly. That is just an awesome thing for them to do because then I'm not doing the same thing over and over again when I have 400 other things to do. Instead, people there whose job it is to do that, do it. They make sure all the attachments are there and that all the Ts are crossed and the Is are dotted. (Interviewee N)

Given the structures of ASP projects, the relatively routine relationship modality, and the relatively modest and specific project needs, research participants described the financial model of the ASP as is in line with published work on shared platforms. Staff in the projects described a 10 percent fee levied on their grants/funding that was paid to the platform hub. This was considered acceptable value-for-money by almost all of those in the projects. Staff in the platform hubs noted that there has not yet been a detailed cost accounting for the overall fee of the platforming functions in the ASP because most staff performed other roles in the organization. For example, staff that specialize in HR support for the platforms also run the HR function for the platform hub and the wider host organization. Despite this, however, staff indicated relative confidence that the platform function was mostly funded by the fees paid by the projects.

The Community Development SP model

The clientele or "target" of the CDSP was distinct from that of the ASP (see "Desired outcomes" and "Project staff" in Table 1). This type of platform had a distinct environment or milieu it needed to adapt to. The CDSP project organizations were different from those described in the ASP in a number of basic ways. They focused on a set of local issues at the nexus of immigration and settlement, youth, anti-poverty, social engagement, arts, and employment issues.

Platform hub staff did not describe the participants in the projects simply as a means to achieve the organizational mission. Rather, supporting the participants/projects was much of the organizational mission itself (see "Main goal" in Table 1). While the external outcomes of the projects were considered important, the activity and development inside the projects/participants themselves was considered to have higher prominence and centrality compared to the ASP. Unlike

project participants in ASP organizations, which were fairly typical to the nonprofit sector, the participants in CDSP projects were themselves from the margins. They were subject to the multiple social and economic ills the organizations were purposed to intervene in.

The CDSP hub and project organizations were mostly located in local environments where issues of poverty, immigration, unemployment, youth engagement, mental health, and addiction were heightened. As one research participant said in a tongue-in-cheek way, this context was "a bit of a messy sector to work in" (Interviewee C). The population was deemed to be high potential, but also with large, structural, and often intractable problems. Importantly, these issues were not simply those that the projects were focused on; they were also the home environments of the staff, volunteers, and participants of the CDSP projects. This differed significantly from the more commonly professional, formally educated, and comparatively mainstream background of many in the ASP context.

This variation in background helps to explain a number of the differences observed between ASP and CDSP models.

> Someone [a project staff/participant] lost their housing a couple of years ago … Although they were in the [mental health] system, and the welfare … system, and had all these social workers, this person could not get any help for moving, the system just totally let them down. He … called me shaking and almost crying and said "my stuff is going to be out on my front lawn. I have no idea how to move all my stuff." So we just rented a van. Our crew went down there and we moved him. (Interviewee D)

With project staff and participants coming from these contexts, the distinct nature of the CDSP projects themselves is not surprising. Projects were reported as much smaller and more prospective than those in the ASP. Some platform staff even reported having participants who did not have a specific project but rather were considering or prospecting several options. These differences in the nature of CDSP projects provided direct contrasts to what they regarded as the more traditional nonprofit organization models of the ASP. One CDSP project participant noted that:

> I [don't] need to … take this above into something [beyond an informal project]. It's like "no, I see a need and I feel capable of being able to address that need in this direct way, and that's what I want to do." I'm not thinking about starting a thing so I can turn it into a charitable organization and do audited statements every year or whatever. (Interviewee E)

A CDSP staff person who supported projects such as this critiqued the implicit full-time, permanent middle-class staff assumptions of "the nonprofit industrial complex" (Interviewee H), and another noted that it was inappropriate that "the language of capacity building has an assumption that they [i.e., project participants] will become EDs [executive directors] some day" (Interviewee B).

The characteristics of the CDSP provided a number of contrasts to those of the ASP, commensurate with the differences between the clientele or target groups of the two platforms. One participant who had worked in both versions of SP described the CDSP hub role as much broader than that of the ASP, widening into mentorship.

> The [ASPA] is a platform, which is more transactional, right? And then there's a spectrum that gets increasingly more … transformational, like the [CDSPD], which works more intensively with its groups and its partners. So there's now actually a discussion that's starting to happen … so when [funder B] uses the language of "organizational mentor," what does that mean? It means you have to have that platform function because that is sort of like the bare minimum, but what else does it mean? (Interviewee B)

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The multiple functions and activities in the CDSP reflected its target group, which had administrative needs but multiple other important needs as well, both for the projects as well as for the individuals involved in them. The inclusion of mentorship and leadership development as major foci of the CDSP function means that the relatively simple division of labour observed in the ASP structures, i.e., administrative activity separate from mission activity, was not observed in nearly the same manner in the CDSP.

The scope of platform activities in the CDSP was frequently remarked on during the research. Most simplistically, this was reflected in a much wider range of platform service-like[2] activities. One participant noted that beyond the basics of ASP platform services such as bookkeeping, "we were running trainings, and running leadership development pieces, and helping people with financial literacy, and project management, and budget management, all these things" (Interviewee M). The platform role was both intensive and extensive, organizational/technical, and interpersonal. Consider, for example, the administrative function of platform hub involvement in project budgets. Unlike the ASP, where skills and experience in this area were common in platform projects, even the most basic rudiments were commonly described in the CDSP as areas where the platform itself needed to provide extensive support, skill building, and training.

> I will do all the financial stuff … sometimes it means having to literally sit with someone and teach them how to open an Excel sheet, how to put in everything. Like, literacy is very, very basic … [Project J] is a good example of that because the person who stepped forward to do that administrative side didn't even know how to use Excel. (Interviewee M)

In the CDSP, the platform function was described as extending beyond the formal and the organizational, to deal with the difficult and compelling needs of some of the participants. Thus, supporting even relatively small projects or relatively small numbers of project participants was work intensive for platform staff.

Superficially, the financial models of the ASP and CDSP were quite similar. The same 10 percent administrative fee was generally levied on CDSP projects to fund hub expenses. Because of the nature of CDSP projects, however, the underlying financial model was considerably different from that of the ASP. On one hand, the non-routine and intensive nature of the relationship between platform staff and projects highlight the significant staff resource needs of the CDSP projects. On the other hand, the small and often short-term budgets of the projects meant that the 10 percent fee levied by ASP platforms on projects would not produce anything close to the revenue observed in the other model.

> The systemic ceilings also apply to us as organizations … you'll hear this over and over again, the 10%, the 12%, the 15% doesn't nearly cover the capacity development that's involved and what's involved in platforming in [CDSP] groups. And that's not to be taken lightly. It's not belly-aching. It's like a 10% fee covers like um, you know, some of the bookkeeper's time, and it covers maybe part of the insurance that you have to … for these initiatives. (Interviewee B)

In addition, staff of several CDSP hubs noted that some projects had basically no budget and others had so few funds or had staff with such major needs for what little was available that the 10 percent fee was thought of as a general model rather than a rule.

The evolution of the CDSP from the ASP
The ASP preceded the CDSP as a shared platform structure in the Toronto nonprofit organization community. Multiple CDSPs evolved based on modifications of the ASP model and based on modifications of the emerging CDSP approaches. This section documents how the organizational model transferred across niches and into a community development environment. Three relevant elements emerged from the data.

First, there was evidence that the platform prototype of the single ASP was relatively high profile in Toronto. The ASP described its function and model in significant detail on the organization's website. The staff of the organization made numerous presentations about this innovative structure in workshops, at local universities, and in meetings and professional learning settings. One of the practitioners in a CDSP reported that "[ASP A] has been really great in terms of networking and just providing us with opportunities to get better exposure [to the idea of the SP] as a social innovation" (Interviewee C). This establishes the presence of a high-profile reference model of a shared platform in the Toronto nonprofit community.

Second, there was evidence in the data of a tight network of a relatively small number of practitioners among the platforms and major funders. Several of these practitioners also described their own job mobility between organizations in this network. There were staff who had worked in an ASP context and then moved to a CDSP, and staff who moved between funders and ASP-based work and CDSP-based work. This clearly suggests that staff transfer and the relationships between staff working in different platform organizational contexts formed an informal shared platform community of practice. These participants described the relationships and communications, as well as the transfer of ideas from platform to platform. The evidence indicates that there was ample opportunity for the ASP model and its ideas to transfer into a different context, one where it could evolve to fit the specifications of a community development environment.

The data showed both the visibility of the initial model of shared platform, which is now designated as the ASP, and the staff networks linking the whole platform community. It highlighted how the ASP model could have evolved in other settings that had a kind of natural affinity for platform-like structures.

Third, the data also indicated that members of the Toronto SP community were actually unaware that they had created a distinct new form of SP from their local improvisational work. They had not deliberately intended to, and were actually puzzled at how to characterize the Toronto platform population. In meetings with a semi-formalized shared platform group convened by a key funder, some participants commented that it was "tricky" to promote the platform structure more widely in the Ontario nonprofit community because most of their organizations were "not real shared platforms." It was only as a result of an initial research report (Dart, 2016) that members of the community understood that they had, in fact, developed a new and distinct variety of shared platform: the CDSP.

DISCUSSION

This article offers descriptions of the structure and function of two different varieties of shared platform. One variety of shared platform, the ASP, is consistent with the description of shared platforms in the literature (i.e., Jurbala, 2012), while the other variety of platform, the CDSP, is not yet documented. This article also presents documentation of how a novel organizational form primarily created to address capacity issues in small nonprofits evolved into contexts with a different purpose. In contexts with community development goals of solidarity, mentorship, and support, there emerged a significantly different variety of essentially the same underlying organizational type. The shared platform, introduced as a new type of nonprofit organizational structure, became a type with two distinct variants, each of which were adapted to a distinct purpose and context.

The literature describes the SP as an innovative structure to address capacity issues of small nonprofit organizations (Wollebæk, 2009a), primarily through the provision of high-quality administrative services that simultaneously support the small organization and allow its principals to focus on their pro-social programs and interventions (Jurbala, 2012). While this exploratory study does not allow for any kind of systematic assessment of the quality or impact of this novel structure, it does contribute several elements to its further consideration. First, the ASP type is documented as functioning as per the description in the literature. Most of the projects of the ASP were those that, in a different context, would have been small nonprofits or charities. Instead, these projects reported advantages to the ASP structure, which made their

participation make sense. "We don't have to worry about the rules and regulations … They [the administrative hub] are doing all that … Frankly it just makes way, way more sense" (Interviewee L). Thus, there is at least a preliminary basis for the further consideration of the ASP as a structure that assists with capacity issues of small nonprofit organizations.

In contrast to the limited data on the ASP, which corroborates what has been written thus far regarding shared platforms, this study provides more data and conceptual development regarding an alternative to the shared platform structure as it has been understood to this point. Specifically, the CDSP variant documented in this study provides evidence of a structure that is intended less for small nonprofits than for pre- and proto-organizational activity[3] in community and grass-roots contexts. This frames the CDSP more in terms of community development, social inclusion, and mentorship than small organizational support. This purpose of an SP structure is not yet described in the literature.

The process by which the ASP was transformed into the CDSP variant has important connections to the bricolage literature (Baker & Nelson, 2005), but one which the data shows to be unintentional in many ways. The community was unaware a new form of platform had been created. They simply "made it work" through iterative processes of change in a specific context. Documentation of bricolage normally acknowledges it as an incremental and iterative process (Di Domenico, Hough, & Tracey, 2010). In this case, the findings show it occurring through a diffuse network of individuals and organizations, rather than being led by a specific institutional entrepreneur. In this way, it is similar to the "social bricolage" process (Di Domenico, Hough & Tracey, 2010), though the data here describe an even more diffuse process. In the shared platform example, bricolage is seen as a field-level process rather than merely an individual one. The process was also unintentional and/or implicit in important ways. The CDSP practitioners did not set out to create a new variety of platform, so much as make the platform model "work" in their context. These are a new set of emphases to bring to the bricolage aspect of institutional entrepreneurship studies. Cumulative bricolage (i.e., iterative experimentation, adaptation, and sense making) may result in something quite far from its beginnings, even if that is not an explicit intention.

The literature typically frames social innovation as a process to create a new form, scalable in different contexts (Phills et al., 2008). Instead, this study documents the evolution of a socially innovative organizational structure into a new variety due to the needs, constraints, opportunities, and benefits of a distinct context. This suggests that it is also important to understand that with social innovation, local specification and flexibility may be a relevant and competitive priority.

IMPLICATIONS AND CONCLUSION

In the context of the well-documented difficulties of small nonprofit organizations (Wollebæk, 2009a), the shared platform organizational structure has emerged as one social innovation that offers an opportunity to address many of their efficiency and effectiveness concerns. This article documents the organization and operation of shared platforms in Toronto and has shown more than the expected incremental adaptation that such a proto-institution might be expected to demonstrate in a new setting. The processes of bricolage operating at a network or field level have not simply adapted the new nonprofit organizational form but actually created a new and distinct variety of shared platform intended to support community development rather than small organizational concerns.

It is relevant, however, to highlight the study's limitations. First, the findings are based on a detailed exploratory analysis of multiple organizational participants from as many shared platform organizations in Toronto as could be identified from a thorough search and through referral. While there seem to be no initial reasons to suspect the accuracy of the major findings—such as the relative scarcity of the ASP version of the platform and the relative robustness of the CDSP version—the findings are based on an initial inquiry and are not a comprehensive population census. Second, this study was based on cross-sectional research and did not have the ability to document the longitudinal processes of change over time as the founding shared platform model diffused and changed in the Toronto nonprofit organizational community.

Regardless, the findings offer considerable value to organizational research and practice communities. This is the first empirical academic study that examines the function and evolution of shared platform organizations. It describes the transformation from one version of shared platform, the Administrative Shared Platform created to solve capacity issues for small nonprofits organizations, into a distinct variety of organizational innovation, the Community Development Shared Platform. This latter type of shared platform provides a distinct organizational and social function, using an evolved variation of the underlying shared platform organizational model. Further research, however, is needed to better document the varieties of shared platform, better evaluate their potential as a kind of social innovation in the nonprofit sector, and assess the processes of evolution as organizational innovations adapt and vary in multiple contexts.

NOTES

1. Stevens and Mason (2010) focus on the Tides Canada platform, which is regarded as the first and best-known shared platform in Canada. It has been in existence since 2008.
2. "Service" was a problematic term in the CDSP context. Several CDSP participants explicitly problematized the term as one from traditional nonprofit/charitable contexts at odds with peer-to-peer community development practices and perspectives.
3. Some in the study would caution us that this is primarily informal activity and did not aspire to more formal organizational status. Many CDSP participants did, however, aspire to more stable and funded operational status.

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Perceptions of the Physical and Social Neighbourhood Environment and Youth Volunteerism: Canada's Capital Region

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ABSTRACT

Youth are embedded within various ecological systems that may impact their philanthropic behaviour. This study employed online data from a sample of undergraduate students and traced the various pathways through which neighbourhood perceptions (e.g., social cohesion, satisfaction with amenities) related to formal and informal volunteering intensities. Path analyses revealed that neighbourhood cohesion directly predicted formal and informal volunteer frequency; as well, it mediated the relationship between satisfaction with neighbourhood amenities and informal volunteerism. Neighbourhood cohesion was strongly associated with informal volunteer intensity, whereas satisfaction with neighbourhood attractiveness did not relate to any volunteer outcomes. Neighbourhood characteristics may be important drivers of youth volunteerism, and thus stakeholders, organizations, and individuals should consider the impact of the social environmental context on shaping youths' helping behaviour.

RÉSUMÉ

Les jeunes font partie de divers systèmes écologiques qui peuvent influencer leur comportement philanthropique. Cette étude utilise des données recueillies en ligne à partir d'un échantillon d'étudiants de premier cycle afin de retracer les divers parcours par lesquels leur perception de leur quartier (par exemple, sa cohésion sociale, leur satisfaction par rapport aux services offerts) a une incidence sur leurs activités bénévoles formelles et informelles. L'analyse révèle que la cohésion sociale a comme effet d'augmenter le bénévolat formel et informel. En outre, la cohésion semble augmenter le bénévolat informel là où il y a satisfaction par rapport aux services offerts dans la communauté. En effet, il y a une forte corrélation entre la cohésion d'un quartier et le bénévolat informel. En revanche, la satisfaction à l'égard du pittoresque d'un quartier ne paraît pas avoir d'incidence sur le niveau d'implication philanthropique. Il n'empêche qu'en général un bon quartier peut motiver les jeunes à faire du bénévolat. Ainsi, les parties prenantes, les organisations et les individus devraient tenir compte du contexte socioenvironnemental sur le comportement philanthropique des jeunes.

Keywords / Mots clés   Volunteering; Youth; Neighbourhoods; Informal volunteering; Cohesion / Bénévolat; Jeunesse; Quartiers; Bénévolat informel; Cohésion

INTRODUCTION

A subjective appraisal of one's neighbourhood may be linked to an array of youth outcomes and behaviours (e.g., mental health, academic achievements) beyond what geographic information systems or other objective measures can reveal (e.g., Eamon & Mulder, 2005; Forehand & Jones, 2003; Plybon, Edwards, Butler, Belgrave, & Allison, 2006). Since neighbourhoods can be incorporated in an individual's identity, the image and perceptions of one's neighbourhood may be crucial to how one interacts within the local living space (Forrest & Kearns, 2001). For example, neighbourhood attributes may influence the degree to which residents give their time freely to organizations and help others in their neighbourhood. The present study examines the relative contribution of perceived neighbourhood cohesion, neighbourhood satisfaction, and neighbourhood problems on youths' volunteering intensities. It also explores the potential inter-relationships between these variables. Despite the abundance of literature on neighbourhoods and youth outcomes (e.g., delinquency, physical activity), there is very minimal research on the relations between the neighbourhood environment and youth volunteerism.

Volunteering can be defined as an activity that is usually planned rather than spontaneous, and where time is given to benefit others; it also generally does not involve any remuneration (e.g., Snyder & Omoto, 2007; Wilson, 2000). Specifically, formal volunteering is unpaid help on behalf of an organization (e.g., Carson, 1999; Wilson & Musick, 1997), whereas informal volunteering is less structured and may involve helping neighbours and friends directly outside an organizational context (e.g., Finkelstein & Brannick, 2007; Lee & Brudney, 2012). Volunteering is particularly important for youth, as it allows them to acquire valuable skills (e.g., leadership, career), build social connections, and enhance prosocial attitudes (e.g., Lerner et al., 2005; Siu, Shek, & Law, 2012). There is mounting evidence that volunteerism is linked to positive youth development, including increased confidence, competency, and compassion (e.g., Feldman & Matjasko, 2005; Gardner, Roth, & Brooks-Gunn, 2008), and recently it was shown that youth who volunteered during adolescence had higher wages in young adulthood (Kim & Morgül, 2017). It is well established that social networks and friendships are important catalysts for formal and informal volunteerism (e.g., Lee & Brudney, 2012; Wilson & Musick, 1997), especially for youth (e.g., McLellan & Youniss, 2003; Sundeen & Raskoff, 2000). Vast literature shows that youth who have parents who volunteer are more likely to volunteer themselves, as are youth who are part of religious institutions (e.g., Bekkers, 2007; Gibson, 2008; Pancer & Pratt, 1999). Taken together, social cohesion in the neighbourhood may be fundamental to informal youth volunteering because this type of volunteering may involve directly helping familiar faces in one's neighbourhood. Social cohesion may also be related to formal volunteering because youth who have stronger feelings of belongingness may wish to build their communities through participation in local organizations. Further, given that schools and extracurricular programs are important avenues to initiate youth volunteering (e.g., Pancer & Pratt, 1999; Zaff, Moore, Papillo, & Williams, 2003), having access to and being satisfied with a variety of neighbourhood amenities should promote volunteerism.

It should be noted that youth volunteer for many different reasons, including social and career-oriented motives (Holdsworth & Quinn, 2010; Tessier, Minh-Nguyet, & Gagnon, 2006), as well as wanting to make a difference and feel productive (MacNeela & Gannon, 2014). One study found that diverse young volunteers could be categorized into four groups based on motivations to volunteer: instrumental (e.g., building skills), personal (e.g., emotionally affected by a cause), weak motives (e.g., volunteering was required), and helping identity (e.g., wanting to help others; Ballard, Malin, Porter, Colby, & Damon, 2015). Volunteering intensities may be impacted by motivations, as one study showed that students who volunteered to build their résumé tended to invest less time into volunteering than those who had more altruistic motivations (Handy et al., 2010). In a sample of undergraduate students, it was found that scores on collectivism—characterized by greater concern for community over personal identity—was related to higher informal volunteering frequency (Finkelstein, 2012). Though youth often cite several motives for volunteering, youth with stronger feelings of social cohesion may be especially more inclined to volunteer because it may be part of their identity to contribute to the greater good.

DEFINING NEIGHBOURHOOD COHESION: A BRIEF OVERVIEW

The literature is rife with different meanings and definitions of social cohesion, which has stirred criticism on how to properly understand and study such a diverse concept (Chan, To, & Chan, 2006). Many researchers adopt multidimensional conceptualizations of this construct rather than adhering to a strict set of criteria and principles. Neighbourhood social cohesion has been defined as feelings of connectedness and mutual support between people in a community, as well as the cooperative manner in which they interact (e.g., Buckner, 1988; Obasaju, Palin, Jacobs, Anderson, & Kaslow, 2009; Sampson, Raudenbush, & Earls, 1997). Social cohesion is concomitant with liberal values of inclusion, freedom, tolerance, and equity (Stanley, 2003), and encompasses ideas such as trust, norms of reciprocity, communal values, and the strength of associations that tie people together (e.g., Bruhn, 2009; Chan et al., 2006; Sampson, 1997). Key tenets of social cohesion include: social networks, active participation, trust and reciprocity, safety, attraction to the neighbourhood, and sense of community (Dempsey, 2008).

The origins of a sense of community trace back to Seymour Sarason (1974), who posited that feelings of kinship, shared values, and reduced feelings of loneliness comprise the essence of this construct. A sense of community is composed of many elements, such as feeling a sense of belonging and caring for one another, and the belief that community needs will be met through commitment to other group members (McMillan & Chavis, 1986). Cohesive groups have feelings of belongingness, "we-ness," and members work in harmony to attain a common goal (e.g., Buckner, 1988; Hartman, 1981). These constituents of social cohesion have overlapping elements, namely that relationships and emotional bonds with other group members are essential for fostering social cohesion. In this article, neighbourhood cohesion and social cohesion are used interchangeably as they are not clearly distinct in the literature.

It is worthwhile to consider the bonding and bridging dynamics of social cohesion. According to Robert Putnam (2000), *bonding* ties include strong ties with homogeneous groups (e.g., people of similar religion, ethnicity), whereas *bridging* ties involve affiliations with diverse or heterogeneous groups. Bonding ties are important for social cohesion. People who share similar values and beliefs with other community members may band together because homophilic bonds nurture stronger connections (e.g., McPherson, Smith-Lovin, & Cook, 2001). However, the bonding of homogeneous groups could lead to the marginalization and social exclusion of other potential group members. There is voluminous, yet controversial, literature indicating that residents in heterogeneous neighbourhoods have lower interpersonal trust, which is one facet of social cohesion (e.g., Alesina & La Ferrara, 2005; Costa & Kahn, 2003; Stolle, Soroka, & Johnston, 2008). Notably, Putnam (2007) used data from a nationwide survey in the U.S, and found that people in ethnically diverse neighbourhoods had lower social trust in people of other races and their own race, lower likelihood of donating and volunteering, and fewer close companions than those in less diverse neighbourhoods. Putnam argued that, in the short term, diversity can make people withdraw from their communities and "hunker down" in the manner of turtles. Similar patterns have emerged in Canada; visible minorities reported a weaker sense of belonging and interpersonal trust than British/Northern Europeans (Soroka, Johnston, & Banting, 2006). This research suggests that bridging relationships between dissimilar social groups are important to help prevent potential social isolation. Though the purpose of the present study is not to directly explore neighbourhood diversity, in light of the expanding multiculturalism in Canada, it is imperative to explore how perceptions of neighbourhood cohesion are related to voluntary behaviour because volunteerism itself can "bridge" divided groups and communities (Soroka et al., 2006).

NEIGHBOURHOOD COHESION, SATISFACTION, AND COMMUNITY PARTICIPATION

Recently, there has been a prolific emergence of research on the impact of neighbourhood characteristics on social cohesion and residential satisfaction. Several positive physical properties of the neighbourhood, including shops, cafés, trees, green space, and aesthetics impact residential satisfaction (e.g., Andersen, 2008; Braubach, 2007; Young, Russel,

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& Powers, 2004), while perceptions of high crime and low safety may reduce neighbourhood satisfaction (e.g., Parkes, Kearns, & Atkinson, 2002). Physical disorder may incite negative feelings toward one's neighbourhood (e.g., Sampson & Raudenbush, 1999), whereas the cleanliness of the environment has been associated with higher neighbourhood satisfaction (e.g., Adriaanse, 2007; Aiello, Ardone, & Scopelliti, 2010; Parkes et al., 2002).

Residents who have greater community satisfaction also tend to have stronger feelings of cohesion and an enhanced sense of belonging (e.g., Grzeskowiak, Sirgy, & Widgery, 2003; Hand, Law, Hanna, Elliot, & McColl, 2012). Neighbourhood cohesion, in turn, is linked to higher community participation, whereas neighbourhood problems are often related to lower participation (e.g., Bowling & Stafford, 2007; Glass & Balfour, 2003). One study suggests that social cohesion mediates the relationship between the positive characteristics of the built environment (e.g., walkable sidewalks, minimal litter) and greater community participation (King, 2008). Neighbourhoods with a higher number of facilities may be more cohesive because they offer more opportunities to socialize (Völker, Flap, & Lindenberg, 2007). Positive perceptions of the user-friendliness of neighbourhoods (e.g., social environment, walkability) should mobilize community participation because this facilitates easier contact with others.

Positive perceptions of neighbourhood safety also influence community participation (e.g., Glass & Balfour, 2003; Hovbrandt, Stahl, Iwarsson, Horstmann, & Carlsson, 2007). Living in neighbourhoods with a high level of incivilities (e.g., crime, graffiti) may erode social cohesion because it reduces social interactions in the neighbourhood (e.g., Clarke, Ailshire, Nieuwenhuijsen, & de Kleijn-de Vrankrijker, 2011; Letki, 2008), and may evoke fear in people (e.g., Lorenc et al., 2012; Sampson, Morenoff, & Gannon-Rowley, 2002). According to James Wilson and George Kelling's (1982) "broken windows" theory, dilapidated or unclean neighbourhoods may signal disorder, which can lead to the depletion of social exchanges in the neighbourhood due to inhabitants feeling unsafe. This rich body of scholarship strongly suggests that the environmental context impacts neighbourhood satisfaction, feelings of social cohesion, and community engagement.

NEIGHBOURHOOD PERCEPTIONS AND VOLUNTEERISM

Various neighbourhood attributes have also been associated with volunteer behaviour, though much of this research has focused on older adults. Research has shown that older adults were more involved in formal activities if they perceived greater volunteer opportunities in their neighbourhood and had frequent contact with neighbours (Buffel, De Donder, Phillipson, Dury, De Witte, & Verté, 2013), and if they felt connected, safe, and lived in neighbourhoods with more amenities (Dury, Willems, De Witte, De Donder, Buffel, & Verté, 2014), including greater access to transportation (Bowling & Stafford, 2007). In one study, older adults in Québec, Canada, were more likely to volunteer if they felt stronger neighbourhood belonging and perceived greater accessibility to neighbourhood resources (e.g., restaurants, shops; Richard, Gauvin, Gosselin, & LaForest, 2008). This study did not, however, clearly define volunteering with regard to whether it was limited to organizations or included informal volunteering.

Neighbourhood social cohesion may be fundamental to volunteerism with studies showing a relationship between a stronger sense of community and greater participation in voluntary associations and organizations (e.g., Okun & Michel, 2006). Relatedly, older adults who are very satisfied with their community interactions (e.g., with neighbours, friends) are more likely to formally and informally volunteer (Ahn, Phillips, Smith, & Ory, 2011). While neighbourhood satisfaction is related to social cohesion and community participation, low satisfaction may also be an impetus for activism. In one study, residents who were less satisfied with their neighbourhood were more likely to volunteer, suggesting that these residents may have volunteered to improve their neighbourhood (Dury et al., 2014).

NEIGHBOURHOOD PERCEPTIONS AND YOUTH VOLUNTEERISM

Little is known about the pathways between neighbourhood perceptions and youth volunteerism. Some research supports the idea that neighbourhood social capital (e.g., community trust) is related to youths' civic engagement (Lenzi Vieno, Perkins, Santinello, Elgar, Morgan, & Mazzardis, 2012). Different neighbourhood characteristics may also interact with personal attributes to influence philanthropic behaviour. Among a sample of adolescents, a sense of community and perceived neighbourhood and city concerns (e.g., job availability, safety) were differentially related to volunteerism depending on ethnicity (Kegler, Oman, Vesely, McLeroy, Aspy, Rodine, & Marshall, 2005). Specifically, community involvement was related to neighbourhood safety for African Americans and to a sense of community for Native Americans. Generally, strong community identity should encourage youth to strive for collective action and solve community problems together. Indeed, one study revealed that students' sense of community connectedness predicted intentions to participate in community service (Hellman, Hoppes, & Ellison, 2006).

Naomi Duke, Iris Borowsky, and Sandra Pettingell (2012) found that parental perceptions of neighbourhood social capital and resource availability (e.g., recreational centres, walking paths) related to youths' higher volunteer frequency. In this study, there was no relationship between perceived physical disorder and youth volunteering. Neighbourhood perceptions, however, were only based on parents' responses. Further, the ubiquity of litter in streets and parks has been related to weakened productive relationships among residents (e.g., Sampson et al., 1997). Residents who feel they live in disordered neighbourhoods may have weaker social cohesion and thus may be disinvested in constructive community activities.

The literature on youth volunteerism and neighbourhood perceptions is underexplored. This study attempts to gain a better understanding of the relations between the characteristics of place and community engagement. The models examine the perceptions of neighbourhood problems (e.g., litter) and neighbourhood satisfaction (e.g., facilities, streets) as precursors to neighbourhood cohesion. Theoretically, feeling safe in an aesthetically pleasing neighbourhood with more facilities in which to socialize would seem to foster cohesion.

HYPOTHESIS

Lower perceived neighbourhood problems and higher neighbourhood satisfaction will relate to higher neighbourhood cohesion. These neighbourhood attributes, as well as cohesion, will relate to higher formal and informal volunteer intensity.

METHOD

Participants
This study comprised a sample of undergraduate students from a Canadian university, located in the city of Ottawa (N = 306). Participants had to have lived in the same neighbourhood for at least one year, so they were familiar with their neighbourhood (and to ensure that if they volunteered within the last year, it was in the same neighbourhood). Participants completed online questionnaires from FluidSurveys and received course credits for their participation.

Participants were aged 17–24 (M = 19.36, SD = 1.55). Seventy-eight percent of the sample were female and 22 percent were male. Approximately one-third were in the highest household income category of $100,000 or more (32%), and 77 percent had worked within the past 12 months. Over one-third identified as a visible minority (37%), and many had lived ten years or longer in their current community (42%).

MEASURES

Neighbourhood cohesion
Neighbourhood cohesion was measured using John C. Buckner's (1988) Neighbourhood Cohesion Instrument, which

can be understood as one scale comprising three dimensions: neighbourliness, neighbourhood attraction, and sense of community. This 18-item scale has very high test-retest reliability (α = 0.95) and internal consistency (α = 0.95). It was also able to discriminate among three disparate neighbourhoods (Buckner, 1988). All items are presented on a five-point Likert scale. For ease of interpretation, the scale was reversed (1 = *strongly disagree* to 5 = *strongly agree*). A Principal Component Analysis (PCA) was conducted and the scree plot, as well as the cumulative variance of 96 percent, suggested that a one-factor solution be retained. The scale had high reliability (α = 0.91).

Neighbourhood problems

Participants' perceptions of neighbourhood problems were assessed using a questionnaire from Anne Ellaway, Sally Macintyre, and Ade Kearns (2001). This 12-item scale used Likert rating (1 = *not at all a problem*, 2 = *minor problem*, 3 = *major problem*). The scale was reversed for statistical purposes: higher scores meant a more positive perception of one's neighbourhood. Items that did not seem to reflect Ottawa were modified (e.g., "Presence of needles/syringes" was replaced with "Presence of cigarette butts or beer bottles"). A PCA with a two-fixed component solution was run because the scree plot suggested only two components, which was more interpretable (Table 1). The two factors explained 51 percent of the variance. Each scale was summed and averaged to yield final scores. Component 1 (Environmental Problems) consisted of seven items (e.g., "Vandalism", "Smells/fumes"; α = 0.84). Component 2 (Safety Problems) comprised five items (e.g., "Disturbance from children or youngsters," "Uneven or dangerous pavements"; α = 0.70).

**Table 1: Factor loadings for Principal Component Analysis with Varimax
rotation of perceived neighbourhood problems**

Items	Environment problems	Safety problems
Vandalism	**.76**	.11
Litter and rubbish	**.73**	.14
Presence of panhandlers or shady characters	**.77**	.08
Speeding traffic	**.48**	.10
Reputation of neighbourhood	**.64**	.31
Smells/fumes	**.66**	.25
Cigarette butts or beer bottles	**.77**	.18
Burglaries	**.59**	.38*
Lack of safe places for children to play	**.47**	**.58**
Disturbance by children or youngsters	.27	**.42**
Uneven or dangerous pavements	.28	**.63**
Lack of recreational facilities	.02	**.84**

Notes: Factor loadings > .40 are in boldface. *This item had a factor loading < .40 on the safety problems subscale but was included in this factor based on theoretical reasoning.

Neighbourhood satisfaction

A questionnaire from the European Commission (2013) was adapted for this study as there was no validated scale applicable to a Canadian context. Participants were asked to rate their level of satisfaction with 12 different neighbourhood features (1 = *not at all satisfied* to 4 = *very satisfied*). A PCA with Varimax rotation was conducted (Table 2). The scree

plot, the number of eigenvalues greater than one, and variance explained (50%) suggested a two-component solution. Component 1 (Satisfaction with Neighbourhood amenities) consisted of seven items (e.g. "Availability of public spaces, such as markets and pedestrian areas"; α = 0.80). One item with a cross loading ("Availability of good quality, affordable food") was included in this subscale as it was considered an amenity. Component 2 (Satisfaction with Neighbourhood attractiveness) comprised five items (e.g. "The state of the streets," "The state of buildings"; α = 0.78).

Table 2: Factor loadings for Principal Component Analysis with Varimax rotation of neighbourhood satisfaction items

Items	Neighbourhood amenities	Neighbourhood attractiveness
Public transit (e.g., buses)	**.59**	.18
Availability of libraries or cultural centres	**.67**	.11
Availability of retail shops	**.72**	.14
Schools and other educational facilities	**.77**	.08
Availability of sports facilities, such as recreational centres or gyms	**.68**	.17
Availability of public spaces, such as markets and pedestrian areas	**.59**	.29
Availability of good-quality, affordable food	**.43***	**.50**
Availability of green spaces (e.g., parks)	.18	**.57**
The state of buildings	.21	**.74**
Cleanliness (e.g., does it lack vandalism, litter?)	-.05	**.80**
The state of sidewalks, trails, and walking paths	.26	**.71**
The state of the streets	.15	**.71**

Notes: Factor loadings > .40 are in boldface. *This item had a cross-loading but was included in the neighbourhood amenities subscale based on theoretical reasoning.

Formal and informal volunteering

Variables on volunteering were adopted from the *Canada Survey of Giving, Volunteering and Participating* (CSGVP; Statistics Canada, 2007). Formal volunteering frequency was based on how often participants volunteered without pay on behalf of an organization within the last 12 months (1 = *not at all* to 6 = *daily or almost daily*). For informal volunteering, participants were asked: "In the past month how often did you help relatives, neighbours, friends, or community members (who live outside your home) with activities that were not on behalf of an organization?" This was assessed on a four-point Likert scale (1 = *did not informally volunteer* to 4 = *daily or almost daily*). Informal activities may be less structured and less time-consuming, and thus a shorter time frame would improve the accuracy in which participants remembered these activities.

STATISTICAL ANALYSIS

After the PCA revealed two components for neighbourhood satisfaction, satisfaction with neighbourhood amenities and satisfaction with neighbourhood attractiveness were considered in separate models, though the direction of the hypothesis

remained the same. Theoretically, these components appear to be distinct; neighbourhood amenities may be more strongly associated with neighbourhood cohesion because of greater opportunities for social interactions. The models also included the length of time residing in the community. People who live longer in their community may have a stronger sense of place identity and more social networks, making them more driven to collective action and welfare (e.g., Fleury-Bahi, Felonneau, & Marchand, 2008; Prezza, Amici, Roberti, & Tedeschi, 2001; Young et al., 2004).

Model 1
H1: All variables, including satisfaction with neighbourhood amenities, will directly predict neighbourhood cohesion, as well as informal and formal volunteer outcomes.

H2: Neighbourhood cohesion will mediate the relationship between neighbourhood amenities and formal and informal volunteer intensity.

Model 2
H3: All variables, including satisfaction with neighbourhood attractiveness, will directly predict neighbourhood cohesion, as well as informal and formal volunteer outcomes.

H4: Neighbourhood cohesion will mediate the relationship between neighbourhood attractiveness and formal and informal volunteer intensity.

Path analyses were conducted in Stata software version 14.0 to estimate model parameters by using standardized correlation matrices. All variables in the models were manifest (i.e., observed) variables. The following indices of model fit were assessed: root mean square error of approximation (RMSEA), likelihood-ratio χ^2 goodness-of-fit test, relative χ^2 index (χ^2/df), comparative fit index (CFI), Tucker-Lewis Index (TLI), and the standard root mean squared residual (SRMR; see Hooper, Coughlan, & Mullen, 2008 for guidelines). Briefly, a RMSEA of 0.05 is considered moderate to some researchers (e.g., MacCallum, Browne, & Sugawara, 1996), and to others, any value below 0.08 is reasonable (e.g., Browne & Cudeck, 1992; Kline, 2005). A relative chi-square of less than five is considered adequate (Schumacker & Lomax, 2004; Wheaton, Muthén, Alwin, & Summers, 1977), and a model where the degrees of freedom is close to the chi-square value is also considered adequate (e.g., Thacker, Fields, & Tetrick, 1989). Some researchers suggest that the TLI and CFI should be greater than 0.95 and the SRMR less than 0.08 (see review by Hu & Bentler, 1999).

To test possible mediation within different parts of the paths, bootstrapping was used to obtain precise standard errors and bias-corrected confidence intervals (MacKinnon, Lockwood, & Williams, 2004; Preacher & Hayes, 2008). This method is powerful for obtaining accurate confidence intervals for indirect effects (e.g., Williams & MacKinnon, 2008), and it has stronger power, greater ability to prevent type one error, and is more useful for smaller samples (MacKinnon et al., 2004; Preacher & Hayes 2004, 2008). Bootstrapping methods are more accurate than methods that "assume symmetry and normality of the sampling distribution of the indirect effect" (Preacher & Hayes, 2008, p. 884). An effect was considered significant if its confidence interval did not include zero.

RESULTS

Demographics and socio-demographics
On average, respondents were neutral (neither agreed nor disagreed) about their feelings of neighbourhood cohesion ($M = 2.99$, $SD = 0.70$). The youth scored relatively high on satisfaction with neighbourhood amenities ($M = 3.15$, $SD = 0.54$) and satisfaction with neighbourhood attractiveness ($M = 3.24$, $SD = 0.53$). Youth also felt that neighbourhood environment problems were minor ($M = 2.56$, $SD = 0.44$), as were safety problems ($M = 2.64$, $SD = 0.37$).

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Age was unrelated to informal volunteering (r = 0.07, p > .05), nor was it related to formal volunteering (r = -0.05, p > .05). There were no gender differences in informal volunteering, t (302) = 0.40, p >.05, or formal volunteering, t (302) = -1.26, p > .05. There was no difference between visible minorities and Caucasian youth in either formal volunteering, t (303) = 0.06, p > .05, or informal volunteering, t (305) = -0.76, p > .05. A one-way ANOVA revealed no difference between groups according to religious attendance (no attendance, one to four times a year, monthly, weekly), either in their informal volunteering, F (3, 302) = 1.25, p >.05, or their formal volunteering, F (3, 300) = 2.07, p > .05. Residents' economic conditions may impact on their social cohesion and neighbourhood satisfaction. In this sample, however, there was no difference between household income groups (less than $20,000; $20,000–$39,999; $40,000–$59,999; $60,000–$99,999; $100,000 or more; and not stated) in neighbourhood cohesion, F (5, 300) = 1.18, p > .05. Further, neighbourhood satisfaction with amenities did not differ by income group, F (5, 300) = 0.74, p > .05, nor did satisfaction with neighbourhood attractiveness, F (5, 300) = 1.92, p > .05. Therefore, none of these variables were used as covariates in the path models.

PATH MODELS

Model 1: Satisfaction with neighbourhood amenities
Model 1 was identified because the number of parameters did not exceed the number of observations (Kline, 2005). After running the model, null parameter estimates were found for direct paths from safety and environment problems to formal volunteering (z = -1.58 and 0.20, respectively) and to informal volunteering (z = -1.24 and -1.04, respectively). To consider more parsimonious models, direct pathways were eliminated (i.e., the paths were constrained to zero) from neighbourhood problems to volunteer outcomes (Model 3).

Figure 1: Path diagram tracing perceptions of neighbourhood characteristics, including satisfaction with neighbourhood amenities to volunteering intensity outcomes
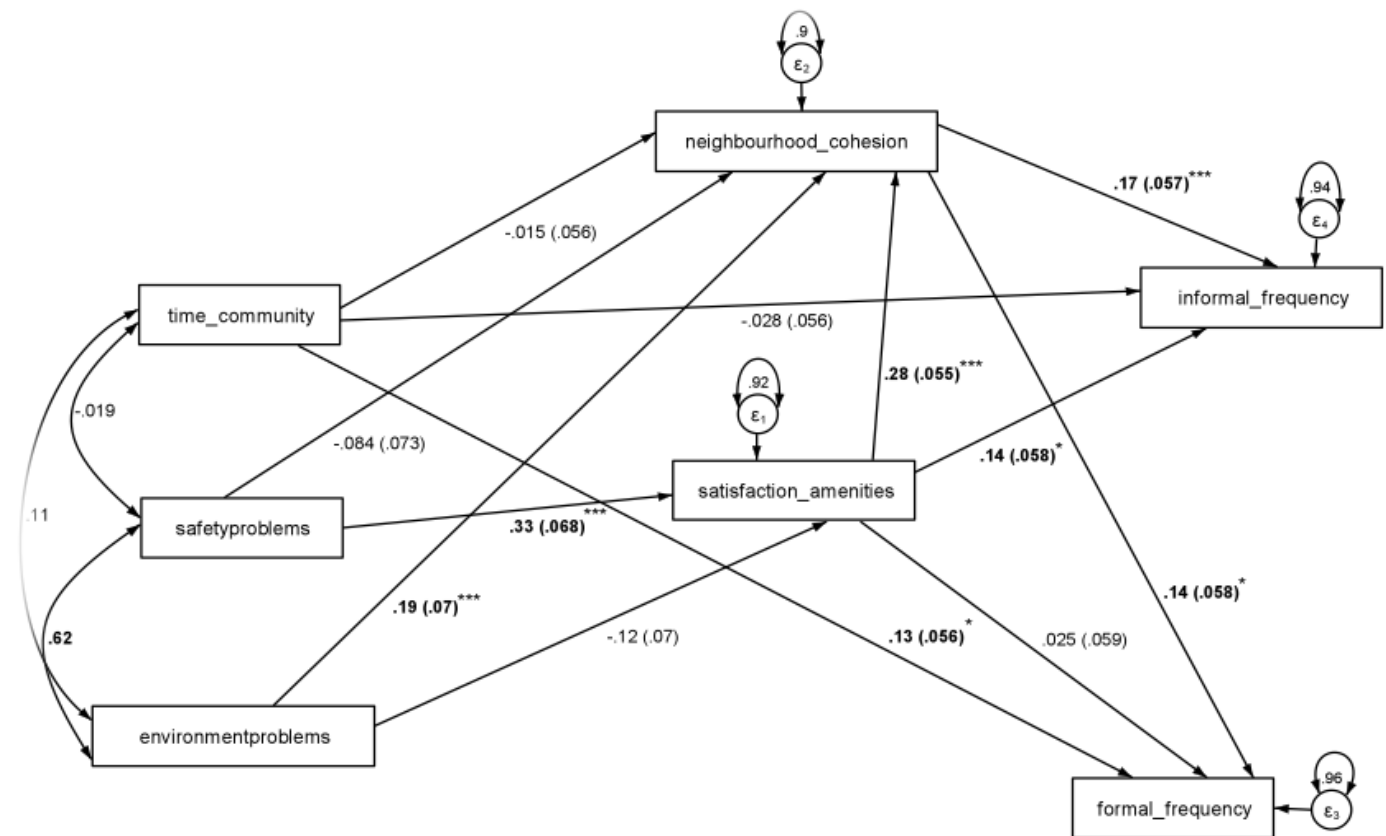
Notes: Satisfaction with neighbourhood amenities is included in this model; parameters are followed by standard errors; *p < .05, *** p < .001

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This revised model (Model 3) demonstrated a better fit than Model 1 for most of the indices (RMSEA = 0.04, CFI = 0.96, SRMR = 0.03). This difference in model fit was significant (LR χ^2 = 5.11, df = 4, p > .05). The difference in the Bayesian information criterion (BIC) between the two models also suggested that Model 3 was the better fit (BIC_i = 4722.72; BIC_{min} = 4705.01; ΔBIC = 17.71). A lower BIC reflects a better fit, and a difference greater than 10 in criterion values constitutes a very strong difference (Kass & Raftery, 1995).

Figure 1 shows the pathways leading to informal and formal volunteer frequency for Model 3. Lower perceived neighbourhood safety problems related to greater satisfaction with neighbourhood amenities (β = 0.33, p < .05), while lower perceived environment problems were associated with stronger neighbourhood cohesion (β = 0.19, p < .05). *H1* was not fully supported because only neighbourhood cohesion subsequently predicted higher informal and formal volunteer intensity (β = 0.17 and 0.14, respectively), while satisfaction with neighbourhood amenities had a direct path to informal volunteering (β = 0.14, p < .05) but not formal volunteering (β = 0.03, p > .05). Neighbourhood cohesion partially mediated the path from satisfaction with amenities to informal volunteering (β = 0.05, *SE* = 0.02, 95% CI [0.02, 0.08]), but not formal volunteering, thus *H2* was not fully supported.

Model 2: Satisfaction with neighbourhood attractiveness
Model 2 had fairly good fit, but similar to the first model, there were no direct paths from perceived neighbourhood problems to informal and formal volunteering, thus these paths were removed to consider a more parsimonious model (Model 4). This revised model had a better fit (RMSEA = 0.03, CFI = 0.99, SRMR = 0.03) and this improvement was significant (LR χ^2 = 3.01, df = 4, p > .05). The difference in BIC was also considered very strong (BIC_i = 4662.78; BIC_{min} = 4642.98; ΔBIC = 19.80). Table 3 shows a comparison of fit indices across all of the models (i.e., original and revised).

Table 3: Comparing indices across each proposed model (*N* = 300)

	Likelihood-Ratio-Test	Relative χ^2 Index	RMSEA [90% CI]	CFI	TLI	SRMR
Model 1 (amenities)	χ^2(2) = 4.16, p = .12	2.08	0.06 [0.00, 0.14]	0.97	0.74	0.02
Model 2 (attractiveness)	χ^2(2) = 4.70, p = .10	2.35	0.07 [0.00, 0.15]	0.98	0.79	0.02
Model 3 (amenities revised)	χ^2(6) = 9.26, p = .16	1.54	0.04 [0.00, 0.09]	0.96	0.87	0.03
Model 4 (attractiveness revised)	χ^2(6) = 7.72, p = .26	1.29	0.03 [0.00, 0.08]	0.99	0.95	0.03

Notes: RMSEA = Root mean square error of approximation; CI = confidence interval around the RMSEA; CFI = Comparative fit index; TLI = Tucker-Lewis Index; SRMR = Standardized root mean square residual. Model 3 had a better fit than Model 1 and Model 4 had a better fit than Model 2.

As shown in Figure 2, neighbourhood safety and environment problems were related to satisfaction with neighbourhood attractiveness (β = 0.19 and 0.32, respectively) but were not associated with neighbourhood cohesion. Although satisfaction with neighbourhood attractiveness was related to neighbourhood cohesion (β = 0.19, p < .05), it was not related to informal or formal volunteering, and therefore *H3* was not fully supported. Neighbourhood cohesion did not mediate the relationship between satisfaction with neighbourhood attractiveness and volunteer outcomes (*H4* was not supported). All other pathways leading to volunteer outcomes were similar to the model that included satisfaction with neighbourhood amenities (i.e., Model 3). It is of note that the size of the effects was relatively small.

Figure 2. Path diagram tracing perceptions of neighbourhood characteristics, including satisfaction with neighbourhood attractiveness to volunteering intensity outcomes
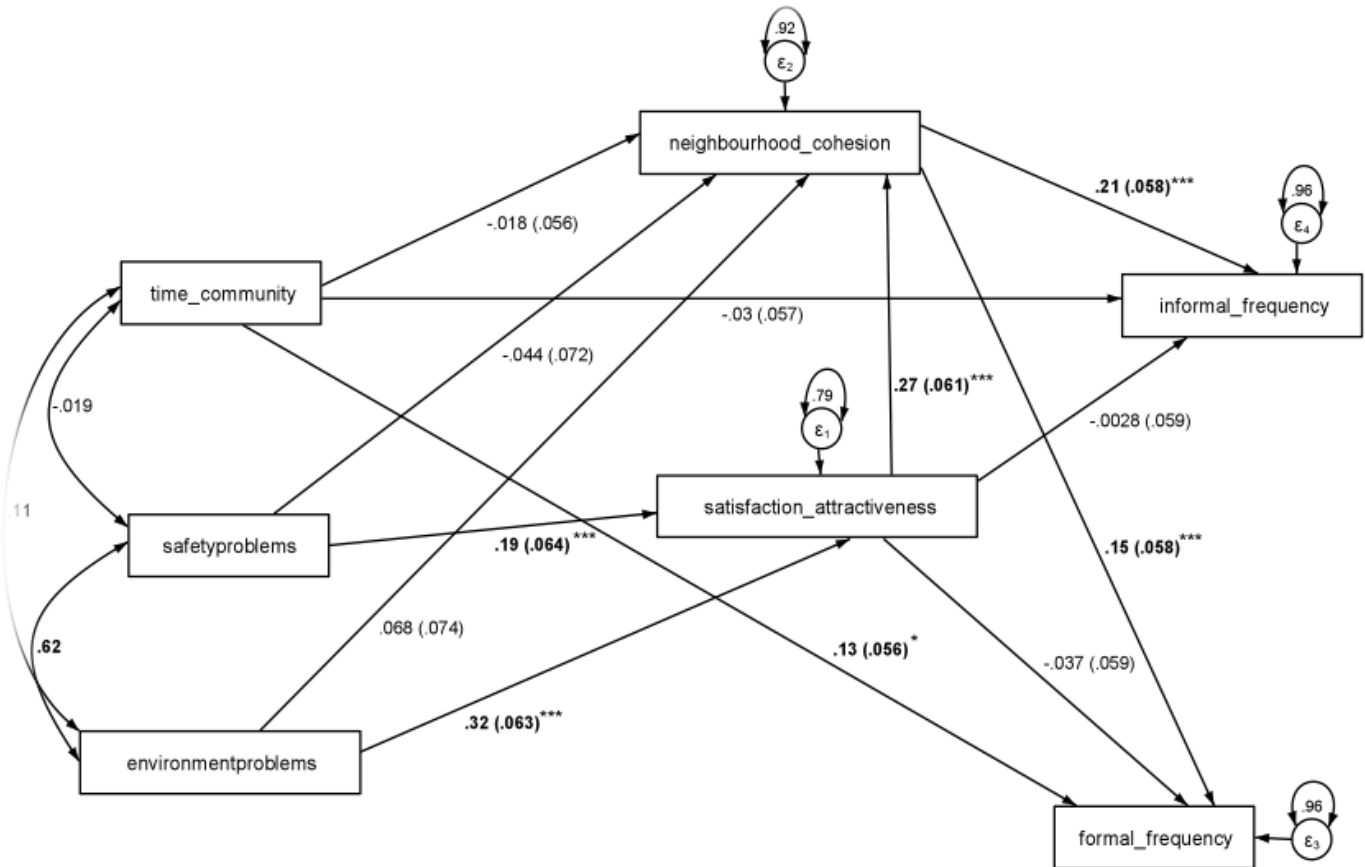
Notes: Satisfaction with neighbourhood attractiveness is included in this model; parameters are followed by standard errors; $*p < .05$, $***p < .001$

DISCUSSION

Based on what is known in the literature, this is the first study to explore the different processes through which neighbourhood perceptions relate to youth formal and informal volunteerism. Notably, in this sample, neighbourhood cohesion related most strongly to informal volunteering (i.e., helping neighbours, relatives, or friends directly). The positive perception of neighbourhood amenities was associated with greater informal volunteering intensity (but not formal), whereas perceptions of neighbourhood attractiveness did not predict any volunteer outcomes. Possible explanations for these findings are discussed in the next sections.

PATHWAYS TO YOUTH VOLUNTEERISM: THE IMPORTANCE OF NEIGHBOURHOOD COHESION

Neighbourhood cohesion may be a key element in youths' community engagement. Neighbourhoods that are more socially cohesive can cultivate social exchanges and companionship, which can consequently promote community participation (e.g., Bromell & Cagney, 2014; Forrest & Kearns, 2001). Conversely, weaker cohesion can reduce social interactions (Forrest & Kearns, 2001) and decrease community participation (e.g., Latham & Clarke, 2016). In this sample, informal volunteering may have associated more strongly with neighbourhood cohesion because this type of volunteering may in-

volve more reciprocity (Musick & Wilson, 2007). Given that mutual assistance is an important facet of neighbourhood co-hesion it would behove people to engage in give-and-take helping behaviours to contribute to a common collective.

Social cohesion may be greatly influenced by neighbourhood satisfaction. People who perceive greater accessibility to and availability of social amenities may experience stronger feelings of social cohesion because these amenities act as conduits to socializing (Völker et al., 2007). Similarly, positive perceptions of the built environment (e.g., aesthetics) have been associated with place attachment and social cohesion (e.g., Arnberger & Eder, 2012; de Vries, van Dillen, Groenewegen, & Spreeuwenberg 2013; Litt, Schmiege, Hale, Buchenau, & Sancar, 2015). Generally, people who are more satisfied with their neighbourhood and who feel a sense of place may be more committed to informal and formal community activities (e.g., Dallago, Perkins, Santinello, Boyce, Molcho, & Morgan, 2009; Grillo, Teixeira, & Wilson, 2010; Manzo & Perkins, 2006).

In this sample, perceived safety problems may not have been severe enough to influence feelings of social cohesion. One study revealed that a majority of Canadians felt that indicators of social disorder (e.g., graffiti, noise) were not a major problem in their neighbourhoods (Brennan, 2011). Further, Ottawa may be safer than many other regions in Canada. In 2016, the incident-based crime rate for all violations in Ottawa was 3,754.38 (per 100,000), which is well below the na-tional rate of 5,904.54 per 100,000 (Statistics Canada, 2018). This study also found that perceived neighbourhood prob-lems were not directly related to volunteering. In contrast, earlier studies found that physical and social properties of the neighbourhood that signal disorder (e.g., cracked sidewalks, crime) limited social participation (e.g., Browning, Cagney, & Boettner, 2016; Latham & Clarke, 2016). However, the bulk of this literature is specific to older adults. Environmental and safety problems may be more salient to older adults' volunteering than to youths' volunteering—older adults may feel more vulnerable to crime, rely more on neighbourhood resources, and face stronger mobility challenges (Oswald & Wahl, 2005). Volunteering may be more easily accessible to youth than older adults, and therefore youth may still engage in volunteering despite negative perceptions of environmental or safety conditions.

This study found that satisfaction with neighbourhood amenities directly predicted informal volunteering but aesthetics did not. Access to amenities and transit stops has been linked to greater interactions with neighbours (Child, Jake-Scoffman, Kaczynski, Forthofer, Wilcox, & Baruth, 2016), which may be a facilitator of informal helping. Whether students perceive their neighbourhood as attractive or not may not be critical to their informal helping, because this measure may be more superficial than satisfaction with neighbourhood resources/amenities. An alternative explanation may be that youth who perceive their neighbourhoods to be less attractive may still be volunteering to improve their neighbourhood (e.g., picking up litter). These findings have implications for intervention and policy, because overall it was found that mostly social aspects of the neighbourhood (cohesion, amenities) were related to volunteerism, whereas perceptions of neighbourhood problems and physical conditions were not associated with volunteerism. Community initiatives and pro-grams should focus on approaches to forging social cohesion among community members (e.g., meet and greet events) to bring people closer together, perhaps motivating them to volunteer in community activities.

Another finding was that neighbourhood perceptions were more strongly associated with informal volunteerism than formal volunteerism. Informal volunteering usually involves acquaintances to whom people may be attached (Stürmer, Siem, Snyder, & Kropp, 2006; Wilhelm & Bekkers, 2010). On the other hand, formal volunteering involves an organization that mediates the relationship between the recipients and the volunteer, thus the volunteer may feel less attached to the recipients (Stürmer et al., 2006). Formal volunteering involves a particular place and time, whereas people can carry out informal activities in "familiar areas freely" (Mitani, 2013, p. 1026). Youth who perceive strong neighbourhood cohesion may preserve this cohesion by helping neighbours and friends. Overall, neighbourhood amenities are conducive to social exchanges, which may lay fertile grounds for social cohesion, thus encouraging shared community participation.

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LIMITATIONS AND FUTURE DIRECTIONS

These analyses were based on cross-sectional data, and path analysis cannot infer causality but only test theoretical relationships. This study investigated how neighbourhood factors such as social cohesion may predict volunteerism, whereas these relationships are often bidirectional. Studies have shown that volunteering led to stronger feelings of cohesion, a stronger sense of belonging, and community attachment (e.g., Crook, Weir, Willms, & Egdorf, 2006; Dassopoulos & Monnat, 2011; Guo, 2014). Bidirectional relationships were not included in these models, as this would have made them non-recursive. Further, some constructs may be better represented as predictors versus outcomes (e.g., neighbourhood problems). Future studies should employ longitudinal designs to gain a clearer understanding about the direction of causation. Multilevel modelling techniques may be beneficial to directly test socio-ecological theories and explore how factors at the neighbourhood level impact on volunteerism. Future studies should also consider objective measures of the neighbourhood (e.g., census tract) and their relationship to youth volunteerism.

This study only examined neighbourhood perceptions in one Canadian city and may not be generalizable to other areas and cities. Future studies should examine whether these findings are maintained, especially in more economically and socially deprived neighbourhoods. Additionally, future studies should consider the relationship between cohesion and informal and formal volunteering in both urban and rural neighbourhoods. In some studies, rural Canadians reported a stronger sense of belonging to their community than non-rural Canadians (Kitchen, Williams, & Chowhan, 2012; Looker, 2014), and had higher levels of trust, safety, community connections, and participation in local affairs (Onyx & Bullen, 2000). A strong sense of belonging in rural areas fosters solidarity and social cohesion and this may translate into helping behaviour. Finally, this study included a small sample of undergraduate students with the majority being in medium to higher income groups, and, therefore, the results may not be generalizable to all youth. Youth who are pursuing higher education may have more qualifications to volunteer that attract nonprofit organizations (Wilson & Musick, 1997), whereas low-income youth may face more barriers to volunteering and live in neighbourhoods with more environmental problems. Future studies should focus on at-risk youth and youth of lower socio-economic status to determine whether their living conditions have different impacts on their volunteering. Further, it is also important to explore neighbourhood perceptions and volunteerism among high school students, because adolescence is a pivotal period for prosocial development.

CONCLUSION

This study contributes to the volunteer literature by showing that youth perceptions of their neighbourhood may be important to their volunteering intensities, at least in one Canadian city. In the Canadian context, as the composition of neighbourhoods continually evolves and becomes more diversified, it is essential to understand ways to avoid social exclusion and ensure youth have a sense of community. This research could be of potential value to urban planners, developers, and government agencies, as youth may invest more into their communities if more facilities are available to them, supporting the notion that it takes a community to build a community. Nonprofits and community stakeholders should also endorse strategies that strengthen social cohesion in the broader environment when trying to recruit young volunteers, because a high sense of community belonging may increase youths' proclivity to engage in acts of philanthropy. This not only has benefits for the individual but can benefit entire neighbourhoods through a constant flow of social capital, whereby strong social cohesion can stir greater participation, thus sustaining, strengthening, and revitalizing communities. Continued research in this area will pursue a more panoramic view of youth volunteerism by focusing not only on individual-level determinants but also the environmental influences of helping behaviour, thus potentially warranting intervention at the neighbourhood level to promote community involvement.

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Volunteering as Meaning-Making in the Transition to Retirement

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ABSTRACT

Understanding the volunteer experience of older adults is of critical importance to the nonprofit and voluntary sector, and society. Research suggests that volunteering is a way individuals derive meaning through the complex interactions that make up measures of self-worth, community concept, and identity. This study explores the meaning of volunteering in the lives of adults over the age of 60 as they transition into retirement. Analysis revealed four primary themes: role identity; confronting ageing, health, and dying; fear/anxiety about transitioning to retirement; and making a difference. Further analysis based on whether retirement was planned or not revealed important differences in the ways that meaning was made. The findings reveal suggestions for improvements in the recruitment and retention of the older volunteer segment in nonprofit organizations.

RÉSUMÉ

Comprendre l'expérience de bénévolat des personnes âgées est d'une importance cruciale pour le secteur bénévole et communautaire. Le bénévolat est un moyen pour les individus de trouver un sentiment d'identité grâce aux interactions complexes de l'estime de soi, communauté, et de l'identité. Cette étude explore la signification du bénévolat dans la vie des adultes de plus de 60 ans, lors de leur transition vers la retraite. L'analyse a révélé quatre thèmes principaux: l'identité; faire face au vieillissement; l'anxiété face à la transition à la retraite; et faire une différence. Si la retraite était prévue ou non a révélé des différences significatives. Les résultats offrent un aperçu unique de l'expérience des volontaires âgés et révèlent des suggestions d'amélioration du recrutement et de la rétention du segment des volontaires âgés.

Keywords / Mots clés Bénévole; Retraite; Les aînés; Sentiment d'identité; Transition / Volunteer; Retirement; Older adults; Meaning-making; Transition

INTRODUCTION

In Canada, the number of people transitioning into retirement is at an all-time high (Statistics Canada, 2015). These individuals are moving out of full-time working roles and into one of the many iterations of retirement—a time replete with fundamental changes to their way of life (Denton & Spencer, 2009). As a greater number of individuals retire, Canada

fundamental changes to their way of life (Denton & Spencer, 2009). As a greater number of individuals retire, Canada and other developed countries are faced with many associated challenges, including growing pressure on social assistance and government-held pension systems (Weaver, 2004), as well as an increased load on public healthcare systems (Canadian Institute of Health Information, 2014; Komp, van Tilburg, & van Groenou, 2012). However, alongside these challenges are also opportunities for communities and organizations. One of the most relevant opportunities for the nonprofit sector is the potential for a larger and increasingly healthy older adult volunteer force (Griffin & Hesketh, 2008; Kaskie, Imhof, Cavanaugh, & Culp, 2008; Tang, 2015).

A growing body of research demonstrates that many adults over 60 have personal and civic commitments within their communities and more free time than earlier in their careers/lives—factors that have been linked to a desire and commitment to volunteer (Einolf, 2009; Kelly & Harding, 2004). Older Canadians are volunteering in large numbers, with about 41 percent of Canadians aged 55 to 64 and 36 percent of Canadians 65 and older giving their time (Vézina & Crompton, 2012), a number that is particularly important now given that there are more Canadians over 65 than under 15 (Statistics Canada, 2015). These individuals may be well-suited for leadership and administrative roles, as well as programmatic or operational roles in areas of niche expertise (Mutchler, Burr, & Caro, 2003), given the breadth of life and work experiences they have had. Even with growing bodies of literature on experiences of ageing, quality of life indicators, and volunteer recruitment and retention, very little research has explored volunteering with community-based nonprofits through the transition to retirement (i.e., partially retired or newly retired within five years).

As older adults face transitions in occupation, sense of self, personal relationships, and other factors for successful ageing (Reichstadt, Sengupta, Depp, Palinkas, & Jeste, 2010), making sense of their individual experience and personal significance becomes critical to their own well-being. The construct of meaning-making (Davis, Nolen-Hoeksema, & Larson, 1998) offers a useful lens to understand choices related to and the impact of volunteering in community-based nonprofits by older adults. Meaning-making has a stronger focus on positive outcomes and benefits (e.g., Narushima, 2005; Schnell & Hoof, 2012), where previous work using role theory has been largely focused on the loss and re-establishment of identity (e.g., Chambré, 1984, 1993). In this study, the notion of being in transition from working to retirement is pivotal, as this phase of life is focused on significant social, economic, and lifestyle changes (Chambré, 1993; Einolf, 2009; Lancee & Radl, 2012), however, there is little research that explores the effects of these changes in the context of volunteering. Further, qualitative research designed to elicit the stories and experiences of older adult volunteers within the community-based nonprofit context is also sparse (Misener, Doherty, & Hamm-Kerwin, 2010). The current study seeks to help fill some of these important gaps in the nonprofit management literature.

Among community-based nonprofits in particular, which rely on volunteers to serve in all capacities, understanding those factors that influence individuals' experience and retention as volunteers is paramount to the sustainability of the sector, as well as the well-being of the volunteers. As such, the purpose of the study was to understand how older adults made meaning through volunteering during the transition from paid work to retirement, and how this affects the nature of their volunteer involvement. The central research question guiding the study was: what role does the volunteer experience play in meaning-making during the transition to retirement among older adults?

CONCEPTUAL BACKGROUND

Meaning-making

In order to understand the role of volunteering in the transition to retirement, this article draws on existing theories of meaning-making. Research on meaning and meaning-making appears across a variety of disciplines with a broad range of understandings, including health research (e.g., Parkinson, Warburton, Sibbritt, & Byles, 2010), feminist studies (e.g.,

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Rakow, 2015), business and industry studies (e.g., Lowe, Rod, Hwang, Johnston, & Johnston, 2016), and religious studies (e.g., Page, 2015), among other fields. For the purpose of the current study, the concept of meaning-making is drawn from the fields of positive and social psychology and the work of Susan Nolen-Hoeksema and Christopher Davis (2001) (see also Davis, Nolen-Hoeksema, & Larson, 1998; Nolen-Hoeksema & Davis, 2002). As such, meaning-making can be understood as the complex interactions of personal needs and desires that make up an individual's measures of self-worth, community concept, and the way they identify as a person. This complex interaction of individual and social self-concepts tries to answer questions such as: Who am I? What is my place in the world? Why do I matter? This conceptualization is framed by Davis, Nolen-Hoeksema, and Larson's (1998) two construals of meaning, where meaning is derived from *benefit-finding* (where meaning is about significance) and *sense-making* (where meaning is about the comprehensability of situations and settings). These constructs are a particularly useful way to understand individual experience and the development of existential and personal significance through life experience.

The sense-making construct of meaning-making is further informed by the work of Adam Theron and Linda Theron (2014), who explain that while meaning-making is inherently an intrapersonal process, it is also contextualized to the individual and their cultural setting. Individuals faced with major life changes look for a place for the self in a changed world as a way to gain perspective on major life changes, something that has been explored extensively in psychological research on illness and dying (Gillies & Neimeyer, 2006; Heine, Proulx, & Vohs, 2006). The same is true for recent retirees, who are seeking to contextualize their new roles by making sense of their new space and place. Tatjana Schnell and Matthias Hoof (2012) highlighted that meaning-making as a function of volunteering is generally absent from the literature and could be applied in order to better understand personal meaning and a sense of self among volunteers. Yoshitaka Iwasaki, Emily Messina, John Shank, and Catherine Coyle (2015) explored leisure in meaning-making for adults with mental illness and found cognitive and social benefits in volunteer work. Similarly, Heather Porter, Iwasaki, and Shank (2010) identified benefits related to identity expression, freedom, and social connections derived from volunteering. Thus, focusing on the processes of benefit-finding and sense-making within the transition to retirement allows for deeper understandings of the meaning-making process in this pivotal stage of life.

Retirement

Retirement and its associated changes in lifestyle have come to form an essential part of our understanding of life stages in North America (Denton & Spencer, 2009). Retirement can be defined as the withdrawal from paid working life, with sufficient resources to support one's self (with or without state subsidy) until death (Denton & Spencer, 2009). In Frank Denton and Byron Spencer's definition, the withdrawal from paid occupation is far from smooth, necessarily complex, and can have multiple transitions in and out of paid work. It is important to note that retirement is not always tied to age (McMahon & MacQueen, 2014), although in Canada, 65 years of age is when individuals are eligible for full retirement pension benefits from the government (Government of Canada, 2015).

Despite formalized pension processes, retirement is not always a linear process of moving from a full working life to complete retirement (Denton & Spencer, 2009). Some individuals may remain employed at a different or reduced capacity for a period of time, or seek out other employment after ending their career work (Griffin & Hesketh, 2008; Kim & Feldman, 2000). Regardless of the circumstances of the transition, the perception exists that retired individuals possess more free/leisure time, with increased choice over time-use activities (Einolf, 2009; Nimrod, 2007a; Rosenkoetter, Gams, & Engdahl, 2001). So entrenched is this idea that it dominates advertising and business strategies for companies associated with retirement (e.g., Freedom55, 2015). Retirement for many is a negotiation of the various role responsibilities that remain in the absence of work life, such as household work, social obligations, family care, and community involvement (Blanchard-Fields, Solinge, & Henkens, 2008; Rosenkoetter et al., 2001), as well as financial responsibilities, including living on a lower income, lifespan budgeting, the higher costs of medical and other living expenses, and social pressures

among friends and family (Lusardi & Mitchell, 2009; Mutchler et al., 2003). Additional expectations for civic participation, or the perception of increased availability to help neighbours and friends, also exists for older adults (McDonald, 1995; Nancy Morrow-Howell, 2007).

Some scholars have explored the different ways that older adults use their time after retirement, and in particular the roles that non-work activities play in the use of that time. Galit Nimrod (2007a, 2007b) and colleagues (Janke, Nimrod, & Kleiber, 2008), have looked extensively at the use of leisure time in retirees, and the links to perceived well-being. Exploring aspects of innovation theory, Nimrod and Douglas Kleiber (2007) showed that adding new activities after retirement is uncommon, yet those who did add new activities experienced a positive effect on well-being. Nimrod and Amit Shrira (2016) showed both an increase in the quality of life of highly involved individuals, and a reduction of quality of life in individuals with very low activity after retirement. Drawing from this literature on older adult leisure, scholars have shown that volunteering can be a tangible use of time and intellectual capital (Hong, Morrow-Howell, Tang, & Hinterlong, 2009; Misener, Doherty, & Hamm-Kerwin, 2010), and there are many avenues for its application and examination in the nonprofit literature.

Older adult volunteers

Similar to retirement, volunteering has been defined in many subtly different ways within the literature. Statistics Canada defines a volunteer as "A person aged 15 and over who did any activities without pay on behalf of a group or organization, at least once in the 12 months preceding the survey. This includes any unpaid help provided to schools, religious organizations, sports or community associations" (Vézina & Crompton, 2012, p. 38). This effort on behalf of organizations or groups is considered formal volunteering and can be contrasted with a less structured, sometimes less recognized type of informal volunteering, which often takes place within close communities and would include actions such as checking on neighbours or doing childcare (Lancee & Radl, 2012). Previous research has shown that older adult volunteers engage in both formal and informal volunteering (Tang, 2015). This section reviews key facts of the volunteer experience for older adults in order to build a foundation for the further review of meaning-making in this population.

Research on older adults' motivations for volunteering is extensive and demonstrates the diverse motives for engaging in this pursuit in later life. While not the central focus for the current investigation, an awareness of volunteer motivation can be useful as a backdrop to any investigation related to the experience of meaning-making in a given pursuit (Clary & Snyder, 1999). Various models have been developed to account for older adult volunteer motivation, and Morris Okun, Alicia Barr, and A. Regula Herzog's (1998) evaluation of them demonstrated the complexity and interactive nature of those motivations. Various elements promote volunteering among older adults, including access to personal resources (Principi, Schippers, Naegele, Di Rosa, & Lamura, 2016), positive self-image (Griffin & Hesketh, 2008), and ease of access (Tang & Morrow-Howell, 2008), among others. Lona Choi (2003) also demonstrated that when older adults volunteer they benefit from positive self-worth, which may encourage further civic involvement. Also, older adults are often compelled to volunteer through religious affiliation. Neal Krause (2015), among others, explored how involvement in religious organizations is a major factor in the motivation of older adults to volunteer in religious settings and beyond. Helen Ebaugh, Paula Pipes, Janet Chafetz, and Martha Daniels (2003) also explored how religion was situated in civic involvement, and how the work of religious organizations could be distinguished from secular organizations when engaging in volunteer labour.

Research on the topic of health and well-being in volunteering is extensive, and it generally demonstrates the positive effects of volunteering in retirement on older adults. Ronald Jirovec and Christine Hyduk (1999) explored whether the type and duration of volunteering had an effect on psychological well-being in older adults and showed that it did. Miya Narushima (2005) argued that the learning and transformative structures in volunteering allow older adults to maintain well-being and self-esteem. Lynne Parkinson, Jeni Warburton, David Sibbritt, and Julie Byles (2010) showed how both psychological and physical health factors affected participation and self-rated well-being in volunteer activities by older

women. Nimrod's work (2007b, 2008; Kleiber & Nimrod, 2009), has also made important contributions to this literature, showing that well-being is positively associated with leisure participation, and that this increases with age. Hanna van Solinge and Kène Henkens (2007) showed that the social environment also influences the life satisfaction and well-being of retirees, and that the social transitions in family and work relationships while moving into retirement were vital to maintaining life satisfaction. Marieke van Willigen (2000) also explored the effects of volunteering across the life course, and showed that volunteering in later life had positive effects on health and well-being, and potentially delayed mortality.

Literature in the area of older volunteer behaviour broadly examines the factors that impact the actions of the volunteers themselves or proposes models of volunteer behaviour. Norah Peters-Davis, Christopher Burant, and Heidi Braunschweig (2001) presented a multidimensional model of volunteer behaviour that includes structural, cultural, personality, and situational factors as central facets of older adult volunteer behaviour. Shannon Hamm-Kerwin, Katie Misener, and Alison Doherty (2009) apply this model in the nonprofit context, providing evidence of its applicability in the community-sport organization context and its utility as a multidimensional model for explaining the behavioural choices of older adult volunteers. In their meta-analysis, Elisabeth Godbout, Johanne Filiatrault, and Michelle Plante (2012) identify positive and negative effects on older adult volunteer engagement, including person-linked elements, such as personal values, age, and gender; environmental factors, including physical access and social connections; and occupation-linked factors, including work-similarity. In each of the categories identified in the meta-analysis, as well as earlier modelling work, volunteers were able to use their volunteering experience to make sense of new roles (e.g., sense of personhood or personality), or find new benefits through this form of civic engagement (e.g., novel positive social and environmental spaces).

Although research on the topic of health and well-being through volunteering for older adults is extensive (see Greenfield & Marks, 2004; Kahana, Bhatta, Lovegreen, Kahana, & Midlarsky, 2013; Morrow-Howell, Hinterlong, Rozario, & Tang, 2003; Narushima, 2005; Okun et al., 1998; Windsor, Anstey, & Rodgers, 2008), studies that explore older adults focus primarily on three things: influences on mortality, overall well-being, and how specific experiences affect health outcomes for older adults. For example, Alex Harris and Carl Thoresen (2005) showed that consistent volunteering significantly reduced mortality, an obvious benefit to those individuals facing advanced ageing. These studies, along with those cited previously by Nimrod and colleagues (Janke, Nimrod, & Kleiber, 2008; Nimrod 2007a, 2007b; Nimrod & Kleiber 2007; Nimrod and Shrira 2016), demonstrate that volunteering offers obvious and direct benefits to older adults, and that leveraging those benefits may help older adults experience greater meaning in an important part of the life course.

Using meaning-making as a lens on the volunteer experiences of older adults transitioning to retirement sheds light on, through sense-making and benefit-finding, the unique aspects of this experience and allows for comparison with previously researched understandings of retirement experiences, behaviours, and outcomes. This offers an important contribution for community-based nonprofit organizations seeking to involve older adults and ensure the volunteer experience is meaningful as they transition to retirement.

METHODOLOGY

This study employed an interpretive qualitative methodology whereby the researchers sought to inductively explore and understand the socially constructed meaning people derive from their experience of volunteering. The study also draws on constructivist data collection and analysis techniques (see Charmaz, 2006). This approach was chosen because no framework exists to date that has examined the volunteer experience specifically during the transition to retirement within the nonprofit context. As such, the researchers were mindful of prior literature on older adult volunteering in general (e.g., during retirement), as well as the literature on meaning-making, while being open to new themes and theorizing that can emerge from the "ground up" (Charmaz, 2006). Neither theory nor data are discovered as raw, unaffected, and void of researcher influence. Kathy Charmaz (2000) further argues that in this type of qualitative investigation, the researcher

cannot be objective in the collection and analysis of data; previous experience and expertise will always be a lens through which the researcher frames, collects, interprets, and analyzes data.

Participants were drawn from the population of older adults engaged in ongoing volunteering in community-based nonprofits in two mid-size cities in southern Ontario, Canada, during the spring of 2016. For the purposes of this study, "older adult in transition to retirement" was defined as adults over 60 years of age, who retired within the last five years, or who were actively in the process of leaving the workforce for retirement. Participants were habitual/continual volunteers (regular roles where they averaged more than five hours per month), and were involved with secular community-based not-for-profit organizations. The study was narrowed to secular organizations, given prior research noting that those who volunteer exclusively in faith-based settings may be doing so because of specific motives and normative expectations tied to religious affiliation, and may experience different benefits and/or constraints (e.g., Becker & Dhingra, 2001; Ebaugh et al., 2003). The researchers identified two public community databases that listed voluntary organizations within the two focal communities and sent recruitment letters to the chair or executive directors of all listed organizations across those databases (*N* = 27), inviting them to forward the recruitment letter to older adults within their organizations. Through this procedure, 12 older adults responded to the researchers directly and were willing to participate; they held a variety of volunteer commitments, from newcomer-services volunteering to administrative work. These initial participants also identified others through snowball sampling. Together, 15 older adult volunteers participated in the study, including 10 women and five men. All participants were between the ages of 60 and 70. See Table 1 for other demographic information and volunteer roles.

Table 1: Participant Demographics and Information

Name	Age-range	Gender	# of years since retirement	Main work	Current volunteer role(s)	Volunteer before retirement
HA	60-65	F	5	Manager, local business	Front desk	Yes
DK	60-65	M	3	University administration	Driver	Yes
LM	60-65	F	2.5	NFP management	Hospice	Yes
RL	65-70	F	>1	Therapist	Refugee/Child care	Yes
BJ	60-65	F	1	Crown corporation	Care of under-homed	Yes
ML	60-65	F	1	Sales	Literacy	Yes
WE	65-70	F	1	Sales	Tutor/Driver	No
JP	60-65	M	4	Computers	Photo	Yes
VM	60-65	F	>1	Coach	Community centre	No
DA	65-70	M	5	Teacher	Child care/Refugee	No
CM	60-65	M	2	Teacher	Trails/Theatre	Yes
HE	65-70	F	4	Clerical	Clerical/Local council	No
GD	65-70	M	>5	Sales	Local theatre	Yes
CJ	65-70	F	3	Administrator	Child care/Suicide awareness	No
MB	65-70	F	5	Teacher	Coordinate community dementia project	Yes

Data were collected through in-depth one-on-one interviews with an open, semi-structured format beginning with a single standardized question ("Tell me about your volunteering as you moved into retirement"), then guided by a series of

prompts allowing for the exploration of specific issues as they came up. Interviews were audio recorded and research notes were taken during the interviews to supplement the audio recordings (Charmaz, 2006). In addition to these research notes, personal analytic memos about particular interviews, trends between interviews, and researchers' preliminary thoughts were also taken on an ongoing process throughout the research, which allows the researcher to progress in a systematic, recorded, and transparent manner (Berbary & Boles, 2014; Charmaz, 2006). The data were collected over three months, whereby constant comparative processes and iterations between data collection and analysis took place. The study employed initial coding that was "provisional, comparative, and grounded in the data" (Charmaz, 2006, p. 48), and focused on the research purpose and questions. Additional conceptual focused codes were then applied to further differentiate the data. Finally, axial coding, which allowed for the connection of ideas into larger categories and the de-velopment of that categorical separation into theoretical concepts, was used. The methods of constant comparison, as well as active reflexivity, were employed during data analysis. Both of these were carried out throughout the research project, reflecting the constructivist nature of the methodology (Charmaz & Belgrave, 2012; Denzin & Giardina, 2009; Denzin & Lincoln, 2011). Largely, this meant the ongoing analysis of notes taken and information gathered during inter-views and surrounding interviews via the use of memos, with the intent of reaching the theoretical saturation of the con-cepts explored in the research questions. The findings are presented below in conjunction with a discussion based on the literature. Gender-neutral pseudonyms are used to represent participant quotations.

THEMATIC ANALYSIS AND DISCUSSION

Participants in this study had diverse experiences through the transition to retirement, and, thus, the role that volunteering played in that transition was dynamic and often very meaningful. Participants demonstrated the complex interactions of personal needs and desires that make up how meaning is made through volunteer work. How they derived meaning from each of these elements was both explicit in their responses, and emerged more subtly through thematic analysis, resulting in four major themes: ageing and health, overcoming loss, challenging the self, and making a difference. Although no identifiable patterns based on gender differences or other demographic data emerged in the data analysis, one sig-nificant pattern did emerge across participants related to whether or not retirement was formally planned, which influenced the ways they experienced meaning and the related choices they made about volunteering. Each of these themes is in-terconnected, but they are discussed separately below in order to present a full analytic representation of the individual themes and sentiments of the participants in conjunction with relevant literature.

Ageing and health

Participants in this study contextualized their changing lives through retirement first by positioning themselves as ageing but not old: "I'm already 62, but, hey, I'm not one of these older adults." The majority of participants in this study articulated different ways that volunteering increased their quality of life and well-being, and resulted in feeling less "old"; potentially side-stepping, at least for a time, the physical and cognitive drawbacks of ageing. Anchored by the feeling of being able to engage in activities to keep busy, and stalling the declines of ageing, participants explored how their volunteer work reflected this time in their lives. Participant LM provided one example sharing that:

> Like, the old 50 might be like 65 or 70 now, and that's why you have to keep yourself active. I think that's why other people are volunteering and thinking of it when they start transitioning out of work. You've got to have the next step, "What's the next step in my life?" Because you can have 40 years—well, you could, 30 years left yet? What the hell are you going to do?

Other retirees had different ways of understanding chronological age versus perceived age and the meanings associated with traditional descriptors connected to ageing. For example, "I don't consider myself old. Definition of old is somebody

80 or older. The definition changes and your roles, they change as you age. I'm 68 now" (DA). Another participant described ageing as a subjective process whereby perceptions of ageing are contingent on boundaries set by feeling and planning.

> I will go around saying to people I'm a senior now but sometimes I catch myself. I don't think of myself as a senior whereas there are some people that just even after they retire, they are old. And I think that old has something to do with feeling that they have done their work and now they don't have to do anything more. I'm not a person like that. (HG)

Both of these participants, while reflecting on their age, did so as a way of juxtaposing their retirement status with the fact that they were still actively engaged in volunteerism: activity that precluded them from considering themselves truly old. While these reflections might stem from the forced reconsideration of personal and social roles that occur at retirement, in the context of the interviews for this study, volunteering and the associated mental and physical activity was one of the pivot points that kept participants from feeling truly "old."

Volunteering was also an effective way to contextualize good health in the present when thinking about health issues from the past, or what might lurk in the future. One older adult noted:

> I had sort of an unusual step to retirement. I had some mental health issues, so I was on long term disability … I was eligible to retire in February of 2015, so I stayed [in] medical leave for that period of time and I made the decision to do that … I got involved in [the church] and I found my way to [community services] through church. They're a very big supporter of traumas and one of the fellow retirees who goes to bible study is a good supporter, so then I approached [community services] and became a volunteer there and so for the first few months of my retirement, I was working mostly on my mental health, so I got back involved. (JB)

Similarly, several other participants noted that volunteering allowed them to feel as though they were decelerating the inevitable movement toward the end of their lives, and made it sense for them because

> you feel good about yourself … that's what keeps you healthy so you can give more to others. You have to take care of yourself too, so that's good … And I started to go to the gym regularly, religiously and I thought I'm going to go into my old age healthy so that I can keep doing what I'm doing or even do more if I can but see now, I work with that one association already, the cultural one, I'm at the school and now I'm thinking about the—well, I will contact Alzheimer's and see what I can do there. (LM)

The potential for internalized negatives associated with ageing are reflected in the literature on older adults' expectations around social roles (Minichiello, Browne, & Kendig, 2000), as well as the volunteering literature (Warburton, Paynter, & Petriwskyj, 2007; Warburton, Terry, Rosenman, & Shapiro, 2001). Although many older adults in this study acknowledged the eventual decline in function that may come with ageing, they were eager to minimize those declines, and were using their volunteer involvement as one way to do so: "it's great to have a reason—you know, you'd get up, reason to put your makeup on, get dressed and it's good" (LM). For most participants, the ageing process was closely linked to physical activity and participation, and how these elements contribute to or maintain youthfulness, vitality, and cognitive presence as they transition through the life course. These findings echo Nimrod and Shrira (2016), demonstrating how highly involved/active individuals had a better self-rated quality of life and reported better perceived well-being. As such, volunteering served to give a counter-meaning to the tacit negative understandings about growing older and the implications of that transition for decreased quality of life and health (Nimrod & Janke, 2012). For these participants, being engaged

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with volunteer work allowed them to find new ways of making sense of growing older, allowing them to transition and age with fewer socio-emotional and physical consequences.

Adapting to change

Older adults discussed volunteering as a means of overcoming and making sense of the changes associated with retirement, particularly in their social connections, as well as the loss of purpose, identity, and meaningful time use associated with the exit from paid career work. Older adult volunteers were acutely aware of how the transition to retirement could result in changes and/or the loss of connections and identity, and saw both the good and bad of staying involved with voluntary organizations to shift their perception of those changes.

> I do have a lot of clients who think "What am I going to do in retirement?" and they immediately think, "Well, I'll volunteer and I'll work at the hospital." And I say, "Would you like that?" and they say, "Probably not." And I'd say, "It's a stereotype." Retirees are shown to be people who volunteer at a hospital and not everybody likes that. In fact, there are a lot of people like that. So it is a thing that they need to fill the space. They need that continuity you're talking about and they're a little bit panicky about, "How will I do that and what has meaning for me?" So I think that volunteer activities can ramp up in retirement and hopefully they do have meaning and people pick—like I could see if my sister ends up being in a nursing home and they need somebody to help raise money to buy a blanket warmer, I might get involved in that because it has meaning and that my sister might use this blanket that's warm. And so there's probably lots of opportunities in retirement for it to ramp up because it has meaning and that helps the continuity filling hours and getting a routine and all those other markers of well-being and relationships. (VM)

For some, the transition was smooth, or at least lacked significant challenges. For VM's clients and others, having meaningful activities to occupy their time was an important factor in easing the transition and maintaining a sense of self. LM said: "I volunteer in the summer for a summer camp, sometimes when I am on vacation, and I would just assist with little art projects or things like that or in the kitchen, and kids are just full of life, and I think I just wanted to keep busy [when I started]." LM's reasons for getting involved with the summer camp show an acute awareness of the perils of leaving the working world for retirement, and a desire to reduce the personal shock and adjustment associated with this significant change. She further explained her understanding of these issues:

> We get close to retirement and when you work for 35 years, over half of your life you've been working and then all of a sudden it's like, "This is the end of my [pause] what's my identity now?" That's a huge, huge thing and you don't have a schedule. … It's very frightening. It really is and I think a lot of people [would] get depressed if they don't get involved in something. (LM)

Other participants echoed similar sentiments to the challenges that VM discusses, and the propensity for depression LM articulated. In many cases, older adults recognized the change of personal identification markers associated with being in the working world and the potential for a sense of placelessness and hopelessness resulting from changes in/loss of identity—a phenomenon identified by Nimrod and colleagues (Nimrod & Janke, 2012; Nimrod & Shrira, 2016). Participants in this study saw volunteering as a means to counteract these potential issues in their own lives, in order to better cope with their own struggles in transition.

Volunteering also offered a meaningful opportunity to develop new social and role identities. For most participants, volunteering offered new challenges and new peer groups (e.g., participation on a new community board or organizing a

new social/recreational group). Through these new ventures, older adults found opportunities for continued growth, outlets for redirecting their interests and expertise, new social connections, and increased personal vitality.

In contrast, other participants chose to engage in volunteer work that was similar to the work they did prior to retirement. When discussing why they chose their specific volunteer roles, one participant shared that "I had never really thought about why I wanted to work at the desk, but it is like what I was doing before. I guess I missed the people" (HA). For HA it went beyond a simple social connection to the way in which it was possible to interact with people through the volunteer role, and how this mirrored HA's previous work in front-line sales and service. Prior experience in the service industry drew her to a volunteer role where she could regularly connect with new people.

By replacing lost role identity with volunteer roles, either through new roles or reprises of known work roles, older adults experienced meaningful ways of making sense of the significant shifts happening in their lives at retirement. At a primary level, volunteer roles were linked to ensuring that older adults had purpose in their lives. In this way, volunteering was a desirable choice to fill an individual's need for purpose as it allows for freedom in choosing activity and the potential for a great deal of responsibility and personal gratification (Morrow-Howell et al., 2003). On a secondary level, engagement with volunteer work as a retiree possibly fills a specific role identity void created by leaving the workforce, a void that also represents the value of self within the community (Chambré, 1984; Greenfield & Marks, 2004). In addition and similar to previous work on older adult volunteers (see Greenfield & Marks, 2004; Kahana et al., 2013; among others), volunteering offered a meaningful way to maintain consistent social interaction with others and overcome the loss of role, and the loss of social connections that may have been a significant component of their working lives. Bram Lancee and Jonas Radl (2012) also note that people's social and personal networks are most frequently tied to what they spend most of their lives doing; for many retirees that is their paid work space. As such, opportunities for rebuilding new or existing social connections is a priority for many retirees contemplating volunteering (Einolf, 2009; Morrow-Howell, Hong, & Tang, 2009).

Challenging self

Volunteering also provided participants with opportunities to challenge themselves in new ways and in new roles/contexts that served to extend their cognitive abilities by embracing unfamiliarity.

> Strangely enough, my retirement actually changed my volunteering. I was a scout leader for 20 years and when I started thinking about retiring, I began to realize that I don't want to tie to down to something that I need to attend every week on a regimented pattern. And so I semi-retired from that. I still help out the major camps and that kind of stuff. But I started … well I joined the hiking trail club here. (JP)

Several other participants also noted how their involvement in volunteer work as retirees engaged them in some of the problem-solving and personal challenges that help give meaning to their lives, and provide sometimes much-needed stimulation through taking part in a new activity that was not necessarily familiar.

> For me it was a desire to kind of move away from some of that [work] stuff and into the development of some different skills … I was quite deliberate about making choices for volunteer work that would move me into areas that were new and would involve a new kind of learning. (DK)

For these participants, the idea of personal challenge was essential to maintaining their cognitive capabilities, as well as a productive place in society: elements that are essential to their self-concept and worldview. For them, contribution and maintaining an intellectual standard seemed exceptionally important, and for this reason, there was a particular way that they made sense of the experience and they made decisions accordingly.

Volunteering, then, fuelled older adults' desire to continue to grow through challenging themselves and maintaining their own mental capacity in the process (Komp et al., 2012). The benefit of this challenge and success allowed them to continue to meet the benchmarks for measuring their own worthiness, given the significant personal changes in retirement (Greenfield & Marks, 2004; Morrow-Howell et al., 2003). This desire for challenge that some participants exhibited, and the subsequent benefits they described, adds a layer of complexity to the volunteer engagement decision-making of older adults at retirement, which extends beyond the regularly explored resource-based motivational constructs (Dury, De Donder, De Witte, Buffel, Jacquet, & Verté, 2015; Principi et al., 2016). These personal and intellectual challenges must also create an opportunity for older adults to better make sense of their changed social positions, allowing for improved coping with the rigours of transition and the rearticulation of a personal sense of purpose (Lancee & Radl, 2012).

Making a difference

Participants experienced meaning in their volunteer engagement by perceiving they were making a difference on two levels: an individual level—by directly affecting the lives of others or enhancing their own self-concept—and a community level—where their focus and purpose was to influence and improve the community they lived in. The benefits derived from making a difference were a key aspect of the way that participants made sense of their volunteer experiences. For example, one participant said that "you just need to have affirmation that you are, or confirmation that you are of value to someone, and you're making a difference because otherwise, what's the point?" (ML). Similarly, BJ contextualized the personal benefit derived from making a difference by explaining:

> There's a real mixture of people who come to us for help … it just is fulfilling. … It's such a positive experience and whether everyone must feel like that when they volunteer. I don't know whether everyone gets the same sort of gratification from volunteer work, but it really is profound for me. (BJ)

BJ discussed how she derives very deep meaning from being able to help community members, and is simultaneously drawing significant personal benefit from the work. Others talked about the benefit of their volunteering for the betterment of a community as a whole.

> Well I just want to give back to the community, also the community where I live, and it's a school where—my children all went to this school, and they grew up with that school. So I've had a bit of affinity to it I guess. (LM)

> I have been on the board of directors for [this organization] really since I retired. I do that because I want [the organization] to thrive and build community. And because I have always started as a teacher, I've always been a facilitator of group dynamics. (LR)

For these participants, community links and community building are central to the benefits of volunteering. These volunteers embody the notion that deep community ties tend to drive older adults to continue to contribute at the community level (Einolf, 2009; Gonzales, Matz-Costa, & Morrow-Howell, 2015). As such, volunteering offers an opportunity for older adults to experience meaning by serving their own communities, giving back, and feeling part of an activity that benefits the lives of others (Misener et al., 2010). The involvement of older adults working to better the community creates a dualistic benefit scenario where the individual benefits from the community setting, and the community benefits from the individual, mirroring Morris Okun and Josef Michel's (2006) findings, which correlate a sense of community and volunteer participation. Older volunteers' need and desire to feel as though they are making a difference is further evidence that place and organizational/community climate are essential to older adult volunteer participation (Dury et al., 2015; Ramsey, Parisi, Rebok, Gross, Tanner, Carlson, Seeman, Roth, & Spria, 2016).

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Retirement choice

There was a notable pattern within the data relating to the meaning of volunteering based on whether participants formally planned their retirement in advance or whether they were "forced" into retirement through particular circumstances, such as health reasons, downsizing/restructuring, or family-care commitments. In particular, those who planned their particular exit from paid work into retirement expressed that volunteering was a way to do something different from their previous work:

> I'm learning how to live differently, how to make those different choices, kind of explore a different way of being too. So yeah, it is different. And probably more at this point, we're just open to opportunities that might arise. … So part of thinking about volunteering was that you—it just opens up some different things that you can do. (DK)

The "planned" retirees expressed these feelings openly, and it was an important way they leveraged their volunteer work to make meaning in their lives through new experiences and the development of new skills. In contrast, those who did not formally plan their retirement and felt that circumstances demanded that they retire from paid work tended to find meaning in volunteer roles that looked very similar to what they had done in work prior to retirement (e.g., a participant who had been front-of-house in a family business now works the front desk at a community hub—both roles as the first-contact person and customer support). While they expressed the same attenuations as the planned retirees related to challenging themselves, making a difference, and adapting to change, their choice of volunteer activity more closely mirrored their former occupation or previous experience. This pattern was consistent across the study sample, and provides an interesting additional layer to the way that meaning-making can be considered in the volunteering decisions of these older adults in transition.

CONCLUSION AND IMPLICATIONS

The findings from the current study illustrate key ways that older adults find meaning in volunteering as they transition to retirement. By highlighting their voices, the study provides important insight into the unique ways that older adults experience sense-making and benefit-finding through volunteering. These individuals use volunteering as a leveraging tool against the inevitable pressures of ageing and health, as well as a way to benchmark their own health through participation energy and commitment. This helps them make sense of the physical and cognitive changes of ageing, and allows them to contextualize volunteer participation as a way to remake what retirement means in their lives. Older adults also find benefits in volunteering as a way to replace the personal role identity lost when leaving career work. For these older adults, volunteering also helps to replace lost social connections, which further punctuates the meaning of these leisure activities in their minds. Volunteering offers an important context for welcoming new challenges in their lives, allowing them to learn and practice new skills, engage differently with their existing skills, and build meaningful commitments in new, much less rigid schedules. Older adults were also able to make sense of the time and energy they devoted to volunteering by making a difference in their communities and in the lives of other individuals. Through the work of benefit-finding and sense-making provided by volunteering in the transition to retirement, the participants in this study were better able to answer, at least in part, questions such as: Who am I? What is my place in the world? Why do I matter?

As older adults transition out of work and into retirement, they are faced with a number of challenging circumstances, the most significant among them being the transition itself. Although we encounter media representations of the happy and healthy retired person moving into a phase of "freedom" or "the good life," the reality of that transition is much more complex. Retirees are faced with major changes in their lives, and each individual addresses these changes in his or her own way. This study provides clear evidence that volunteering is an established and meaningful coping mechanism for some older adults as they move through this transition. Through recognizing the complexities of this important stage of

life, and giving voice to the stories of those experiencing the transition, the study offers an important contribution to knowl-edge for nonprofit organizations that seek to engage older adults in meaningful volunteer roles.

Based on these findings, it is clear that older adult volunteers require a different approach to volunteer recruitment and retention than other volunteers. Where youth volunteers may not be able to commit to a regular role, and adult volunteers may require a rigid schedule to help them plan and manage their volunteer commitments, older adult volunteers are gen-erally not looking to be locked into their roles and schedules over long periods of time (Vézina & Crompton, 2012). Older adults have demonstrated positive physical and psychological well-being outcomes from volunteering, and are conscious of these benefits in real time. Organizations could more efficiently publicize these benefits to help recruit and retain older adult volunteers. Organizations must be mindful that through retirement, these older adults are also adapting to extreme changes in lifestyle and self-concept, and volunteering helps to establish, or re-establish, a healthy concept of self and community. By developing and marketing the healthy and inviting social and community aspects of volunteering, organ-izations could help encourage new volunteers to participate as they transition to retirement. In the face of resource con-straints and the desire to remain relevant in their communities, nonprofit organizations can embrace and accommodate older adults as a pivotal source of experience and mutual benefit.

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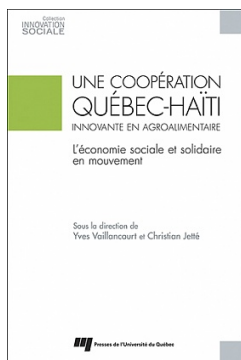
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Compte rendu / Book Review

par Jean-Bernard Robichaud

Une coopération Québec-Haïti innovante en agroalimentaire : l'économie sociale et solidaire en mouvement. *Collectif, sous la direction de Yves Vaillancourt et de Christian Jetté.* Québec : Presses de l'Université du Québec, 2018. 296 p. ISBN 978-2-7605-5005-6.

Ce compte rendu sera subjectif, tellement ce livre m'a rejoint dans une expérience comparable, il y a 25 ans en Haïti lors du Partenariat Acadie-Haïti. Même pays, même engagement des acteurs, même thématique (sécurité alimentaire), mêmes questionnements et mêmes soucis de rigueur dans la démarche évaluative. Mais qui a dit que la subjectivité devait toujours céder le pas à l'objectivité? Une lecture objective a bien des qualités, mais elle risque d'être plus détachée et plus froide et surtout elle peut obnubiler les aspects plus personnels, plus émotifs et plus volontaires des acteurs. Et que dire des liens de solidarité qui se tissent entre les acteurs du Nord et ceux du Sud? Que dire de la motivation qui nous anime? Une préoccupation importante de toute action de coopération solidaire est celle de la suite des choses—en termes plus savants, de la pérennité. Ceci me ramène au partenariat Acadie-Haïti avec la question, qu'en reste-t-il en Haïti, au-delà des bons souvenirs chez quelques-uns de nos partenaires et dans la population visée? Y a-t-il eu des effets durables?Le souci fondamental de la dizaine d'auteurs de ce compte rendu de recherche est de documenter tant le projet d'économie sociale et solidaire qui fait l'objet de l'évaluation que la démarche évaluative elle-même. C'est un document très profond par ses références théoriques, très systématique dans l'analyse des enjeux, très dense et engagé. Ce sera un ouvrage de référence à lire par tous ceux et celles qui voudront dans l'avenir cheminer dans une expérience de coopération solidaire, que ce soit en Haïti ou ailleurs.

Les trois parties de l'ouvrage sont bien montées.

La première partie met la table, elle présente le contexte du projet-pilote et de la recherche évaluative dans toutes ses dimensions. Elle présente les différents acteurs, que ce soit sur le terrain, ou en milieu institutionnel, haïtiens ou québécois. Les fondements théoriques et les concepts sont bien définis. Le contexte politique est aussi abordé dans sa complexité. On y note une volonté d'innovation sociale, une option de coopération Nord-Sud solidaire via l'économie sociale. Le concept de *capabilité* est particulièrement intéressant et porteur d'innovation. À mon avis, il fait faire un pas en avant dans nos efforts de coopération.

La seconde partie, après avoir présenté les origines de la coopération Québec-Haïti en économie sociale et solidaire et la dynamique de recherche partenariale, aborde sans détour la problématique de la souveraineté alimentaire en Haïti.

Elle reconnaît le savoir-faire des paysans haïtiens et la place des femmes dans une approche d'économie circulaire. Elle présente les cuisines collectives et les cantines scolaires comme terrain d'expérimentation et laboratoire de la sécurité alimentaire. Certaines sections sont particulièrement parlantes, notamment la place de la femme rurale dans la famille haïtienne ainsi que la *capabilité* des femmes dans le développement de l'économie sociale et solidaire.

La troisième partie pose des questions importantes sur les conditions de l'innovation en économie sociale et solidaire en Haïti. Même si ces questions sont spécifiques au contexte haïtien, elles ont une portée plus universelle et peuvent éclairer d'autres démarches du même type dans les pays dits en voie de développement. Cette partie pose aussi un regard critique sur certaines pratiques des pouvoirs publics dans l'élaboration des politiques publiques. Elle questionne également l'action des pouvoirs publics internationaux. Enfin, les auteurs réfléchissent sur le rôle des universités et des organisations d'économie sociale et solidaire dans le processus de développement local.

En conclusion, ce qui m'a le plus frappé dans cette lecture, c'est l'immensité de la tâche accomplie, avec si peu de ressources. Quand on connaît le faible niveau de financement accordé tant au projet-pilote qu'à l'équipe des chercheurs, force est de constater que les résultats dépassent largement l'investissement consenti par les bailleurs de fonds. Une note de bas de page met ceci en évidence : « La contribution bénévole des membres de l'équipe de recherche aura dépassé de beaucoup la valeur de 100 000 $ en travail salarié. » Ceci pose toute la question du financement de la coopération internationale. Les impacts du sous-financement des pouvoirs publics en matière de coopération sont immenses, mais trop souvent ignorés. L'une des conséquences de ce sous-financement chronique est l'absence de continuité dans l'action. La coopération se fait de projet en projet, trop souvent sans suite. Quand cette coopération Québec-Haïti sera terminée depuis 25 ans, comme l'est le partenariat Acadie-Haïti, en serez-vous à vous demander si votre action a effectivement été pérenne?

Rappelons-nous que dans la décennie 1970-1980, la contribution du Canada à la coopération s'approchait de 1% du PIB. On croyait cette cible à notre portée. Quarante ans plus tard, nous tournons plutôt autour du 0,25%. Et cette même tendance à la baisse est observable chez les autres pays dits avancés.

J'admire l'engagement des coopérants volontaires et de tous ceux et celles qui s'engagent en coopération, mais prenons conscience de l'ampleur de la tâche et de l'effort de solidarité internationale qui reste devant nous. Exigeons un meilleur appui de la part des autorités publiques aux efforts des citoyens et citoyennes qui veulent s'engager en coopération internationale!

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