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ÉDITORIAL / EDITORIAL

A good start Un bon départ

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Nous sommes très heureux avec les résultats du premier numéro d'*ANSERJ*. Au moment d'écrire ces lignes, les lecteurs ont téléchargé plus de 4,000 articles et comptes rendus de notre premier numéro. Nous continuons de recevoir d'excellents textes et nous espérons que vous serez d'accord avec nous. Toutefois, le nombre de textes en français pour ce second numéro n'est pas à la hauteur de nos espérances, mais nous souhaitons que les membres de la Francophonie participent davantage au mouvement.

À titre de rédacteurs en chef, nous encourageons fortement les étudiants, les nouveaux chercheurs et ceux expérimentés à nous envoyer leurs textes pour évaluation. Comme vous le verrez à la lecture de ce numéro, nous attirons des contributions représentant un éventail varié de disciplines et de sujets. Cela correspond à notre désir initial lors du lancement d'*ANSERJ*.

Il existe plusieurs occasions et défis avec le lancement d'un nouveau journal. La capacité à guider les nouveaux auteurs dans le monde des

We have been delighted with the response to the first issue of *ANSERJ*. As we write this column, readers have downloaded more than 4,000 articles and book reviews from the first issue alone. We have also received excellent submissions—we hope you agree, as you read through this second issue.

As editors, we strongly encourage students, new researchers, and experienced academics to submit papers for review. As you will see from this issue, we continue to attract a range of academic disciplines and subjects, which is just the response we were hoping for when we launched *ANSERJ*.

There are opportunities and challenges associated with editing a new journal. The opportunities lie in the capacity to nurture and guide new authors into the world of academic publishing, and to provide a space and place for critical thinking and rigorous research to see the light of day. One challenge is to support even experienced researchers as they convert a summary research report into a polished academic article. It's not always easy to present a

publications universitaires et à fournir un endroit pour un examen critique et rigoureux de leurs recherches représente des occasions de développement des nouveaux chercheurs. L'appui se situe également au niveau des chercheurs plus expérimenté afin de transformer le sommaire d'un rapport de recherche en un article impeccable pour une publication universitaire. Il n'est pas toujours facile de transformer une revue de la documentation et un contexte théorique solide en un texte avec des arguments concis et attrayants. Il n'y a pas de meilleure conclusion que de citer l'un des auteurs publiés dans le présent numéro, « Je suis fier qu'*ANSERJ* m'offre un endroit pour publier mes recherches. » Nous sommes d'accord.

body of literature and a sound theoretical construct as an argument that is both concise and compelling. We can do no better than to quote one of the authors whom we have published in this issue, "I'm so glad *ANSERJ* is here to give me a place to publish my work!" So are we.

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Advocacy Limitations on Gender and Sexually Diverse Activist Organizations in Canada's Voluntary Sector

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ABSTRACT

Registered charities are restricted when engaging in advocacy, whereas Canadian nonprofits face a far more difficult time when fundraising. The impact of such limitations on Canadian gender and sexually diverse[1] activist organizations is one example of the implications on Canada's democratization process. Despite the efforts of the Voluntary Sector Initiative (VSI), and updated political activity policies, Canada lags behind both the U.K. and U.S. in recognizing and legitimizing advocacy as an important contribution to its democratic process. An organized challenge of the system at the political and legal level is called for to address this issue.

RÉSUMÉ

Les organismes de bienfaisance enregistrés font face à des contraintes lorsqu'ils défendent une cause, tandis que les organismes sans but lucratif rencontrent de nombreuses difficultés pour amasser des fonds. L'impact de ces contraintes sur les organisations militantes de genre et de sexualité diversifiés n'est qu'un exemple de répercussion sur le procédé de démocratisation du Canada. Malgré les efforts déployés par l'Initiative sur le secteur bénévole et communautaire (ISBC) et malgré la mise à jour de politiques sur l'activité politique, le gouvernement du Canada a du retard par rapport à ceux du Royaume-Uni et des États-Unis en matière de reconnaissance et de légitimation de la défense de causes en tant que contribution importante à son processus démocratique. Pour aborder cette question, nous sommes amenés à remettre en question le système de façon méthodique sur les plans politique et juridique.

Keywords / Mots clés

Activism; Advocacy; Gender and sexually diverse populations; Voluntary sector
Militantisme; Défense d'une cause; Populations de genre et de sexualité; Secteur bénévole

INTRODUCTION

This article looks at how Canada regulates the voluntary sector with regard to charitable purpose and political activities in determining charitable status and the ability to advocate for social change. Viewing advocacy as an integral aspect of the concept of charity, I explore how such a premise is aggravated by the doctrine of political purposes. The Voluntary Sector Initiative (VSI) in which the Canadian government engaged in joint talks with the voluntary sector is referenced, and updated political activity policies by the Canada Revenue Agency (CRA) are examined and analyzed. The population focus is specific to Canadian gender and sexually diverse activist organizations, yet the findings have implications across the voluntary sector. Through interviews and content analysis, this paper exposes the limitations placed on Canada's voluntary sector regarding advocacy due to restrictive regulations (Brooks, 2001; Hall et al., 2005; Pross & Webb, 2003; Scott, 2003; Webb, 2000) and how gender and sexually diverse advocacy groups are disadvantaged regardless of voluntary sector status.

Organized efforts to advocate and lobby for social change in Canadian society on the part of minority and disenfranchised groups in the voluntary sector are limited by regulation (Canada Customs and Revenue Agency, 2003a). The legal status of voluntary organizations (e.g., charitable, or nonprofit incorporated) constrains the extent to which they may advocate or lobby for change.[2] Although it has been argued that charitable regulations have expanded to include clarification on permitted political activities (Elson, 2007/2008), I contend that these changes represent incremental improvements at best, while limitations persist. Underscoring such limitations is what is termed in the legal literature as the "Doctrine of Political Purposes." This doctrine draws a fine line between political and charitable purposes, deeming the latter ineligible for charitable status if its objects are heavily based upon the former (Parachin, 2008). A critical deconstruction of a series of historical judgments on legal cases of this matter have been critiqued for falling short of legal justification (Brooks, 1983; Carter & Crawshaw, 1929; Gladstone, 1982; Michell, 1995; Parachin, 2008; Webb, 2000; Wright, 1937), particularly with regard to charities' advocacy work in furthering public benefit (Cotterrell, 1975; Dunn, 2008; Fridman, 1953; Ontario Law Reform Commission, 1996; Parachin, 2008; Sheridan, 1973).

Ultimately, what I bring into question are the limitations placed on charities, and by extension nonprofits, in the voluntary sector. Regulatory constraints concerning political speech and expression based on charitable works limit participation in the political process of democracy (Dunn, 1996). So, why are charitable activities delineated from political purposes such as reforming the law (Dunn, 2008)? This paper is predicated on the role of charity as involved in community engagement and the creation of a civic voice that is permitted to enter the political engagement process on a level playing field, both within the voluntary sector and between sectors (e.g., private sector) as part of a healthy democracy. Such a premise questions why civil society–based organizations that wish to advocate within a social justice mandate are not permitted to do so within the context of registered charity status and its associated benefits.

NONPROFIT ADVOCACY

Two role dichotomies have been identified within the voluntary sector: an increased role in service delivery, much of it redirected from the public sector; and the role of organizations that challenge the system (government) through social change and associated funding concerns (Lindsay, 2001; O'Connell, 1996). Yet, because there is a voluntary sector dependency on private sector, and particularly public sector, funding of core activities and projects, the level of advocacy activities is limited. This is further exacerbated

for state "advocacy structures" (i.e., arm's-length governmental bodies) due to a conflict between program effectiveness and repeated program mandate changes by government funders (Malloy, 1999).

Even when there is a delineated difference between the voluntary sector group and the state, partnerships that form between the two create an environment in which advocacy activities become muted. This is due to voluntary sector "community" partners, who are awarded service provision contracts that make them accountable to both service recipients and the state (Basok & Ilcan, 2003; Walzer, 1995). Voluntary organizations enter contractual agreements that impose restrictive governance (Phillips & Levasseur, 2004), in essence institutionalizing the relationship with negative implications on advocacy and autonomy (Laforest & Phillips, 2001). The subsequent impact is one in which actors within the voluntary sector increasingly become overly responsible service providers at the expense of being advocates for social justice (Ilcan & Basok, 2004; Laforest & Orsini, 2005).

Some such actors form collective identities representing agreed-upon interests, creating political agencies that counter dominant groups and political discourse (Jenson, 1993, 1995; Kymlicka, 1996). Such collective voices demand a form of citizenship that includes not only benefits but also a right of representation both to and by the state (Jenson & Phillips, 1996). The gender and sexually diverse populations have formulated such groups in Canada, with many having attained charitable status. Historically, Canadian lesbian and gay activists have had to carefully weigh their strategies between philosophical leanings and pragmatic achievements (Adam, 1995; Rayside, 1998; Ross, 1995; Warner, 2002). Regardless of which strategies are chosen, the concept of explicit representation (Jenson, 1995) is an important one to the gender and sexually diverse movement (Mulé, 2006; Smith, 2005a), reflected in the demand for infused recognition in policy (Mulé, 2005).

Distinct from the legal justice of human rights protections for lesbians, gays, and bisexuals—yet still absent for transsexuals, transgenders, and intersex[3]—there is much to focus on with regard to social justice for all these populations (Kinsman, 1987, 2006; Mulé, 2006; Smith, 1999; Warner, 2002). The legalization of same-sex marriage and the right to adopt can create a false impression of "equality," particularly when the gender and sexually diverse face and experience numerous social justice issues. These social justice issues include bullying and bashings, stigmatization and low self-esteem, and employment barriers; STIs such as HIV/AIDS; and broad health concerns such as depression, substance use, addictions, and risk of suicide. Intersectional concerns may be age-based, involving children, youth, adults, and seniors who identify as lesbian, gay, bisexual, or transgender (LGBT); ethno-racial cultural conflicts; (dis)ability challenges; and religious-based crises.

The current neoliberal environment discourages local gender and sexually diverse organizations from engaging in advocacy activities, creating a focus on service provision (Carroll & Ratner, 2001; Smith 2005a, 2005b). The gender and sexually diverse movement at the federal level has taken a legal approach, reinforcing individualism and class politics in line with neoliberalism (Smith, 2005b). Thus, despite legal recognition for some,[4] the specified and particularized needs of the gender and sexually diverse communities from a social justice perspective continue, and as such full citizenship in civil society remains elusive (Sears, 2005). Social justice work by NGOs is often hampered by capacity concerns (Laforest & Orsini, 2005) of which gender and sexually diverse social justice groups are not exempt, operating in under-resourced environments in terms of funding, personnel, volunteers, and time. This can have a negative impact on their capacity to address policy concerns in a timely and appropriate fashion. This neoliberal environment, coupled with a history of oppression and disenfranchisement (Adam, 1995;

Smith, 1999; Warner, 2002), has resulted in a systemic lack of recognition in policy (Mulé, 2005, 2007), reinforcing the marginalization of gender and sexually diverse populations.

Critical social work theories (Fook, 1993; Moreau, 1979, 1990; Moreau & Leonard, 1989; Mullaly, 2007) recognize the dialectical relationship between the state and its structures with individuals and their communities in that both benefits and oppression can be experienced (Allan, 2003; Pease & Fook, 1999). On the one hand there is the attainment of recognition (via charitable and/or nonprofit incorporated status) to address a social issue via service delivery. On the other hand there is the frustration of not being able to address the "causes of the causes" due to limited advocacy opportunities. Specific to gender and sexually diverse populations, queer liberation theory (Altman, 1971; Bronski, 1998; Vaid, 1995; Warner, 1999; Warner, 2002) speaks to agency utilized by individuals and organized social movements that recognizes, respects, and dignifies their difference as a valid contribution to the diversity of society, contributing to a project of emancipation as undertaken by progressive members of the LGBT communities. This liberation strategy is distinct from the norm within the membership of the LGBT communities who are inclined to work within structured systems toward neoliberalized notions of acceptance and respectability (Duggan, 2003; Richardson, 2005) and are thus far less inclined to question such systemic structures and their implications on cultural diversity (Mulé, 2006, 2008). A fused critical queer liberation and critical theory lens identifies limitations, questions the status quo, and seeks systemic change through emancipation. Premised on such a lens, what is the impact of existing CRA policies on advocacy/political activities on charities, and by extension, nonprofit civil society organizations such as those in gender and sexually diverse communities?

METHODOLOGY

Data gathered for content analysis in this study targeted existing policies, standards, and guidelines reviewed from a structural systemic perspective inclusive of current regulations on the Canadian voluntary sector particular to advocacy, political activities, and recognition of diversity in Canada between April 2001 and May 2010. The Internet served as a major source in the gathering of these data. This critical discourse analysis focuses on interviews conducted with leading Canadian gender and sexually diverse social justice organizations and how they are implicated by the regulation of Canadian charities.[5]

"ADVOCACY" AND THE CONCEPT OF CHARITY

At the core of the relationship between charity and social justice is the legitimacy of advocacy activities. The extent of advocacy activity by charities has been historically and legally restricted based on the doctrine of political purposes. What is argued in this paper is that if charities are to effectively address their mandates they must take on the "causes of the causes" that frustrate their ultimate purpose, and this requires the ability to advocate for social reforms. By placing advocacy restrictions on charities, their work is often reduced to service provision, and the capacity to affect the social changes required to adequately address the very issues the charity has been created to address is lost. Thus, I will argue that restricting nonpartisan advocacy is antithetical to a charity's capacity to fully carry out its good works.

From a legal perspective, the doctrine of political purposes has enormous influence on this issue, establishing the principle that advocacy activities by charities are incongruous. Doctrine arguments are based on tradition and legal authority, the incapacity of the judiciary to rule on public benefit as derived from political purposes (Drassinower, 2001), and the ascription of differentiation between charity and politics (Parachin, 2008). Such arguments conceptualize charities as needing, for the most part, to

separate themselves from political matters. Political matters are often controversial, as though charities and their good works are incompatible with controversy (Harvie, 2002; Sacks, 1960). The very essence of issues experienced by the gender and sexually diverse communities has been seen by many as political and controversial, yet these communities are not alone in the voluntary sector as being deemed as such.

What is posited here is a concept of charity that permits nonpartisan political activity involving advocacy that is in keeping with a charity's purposes. This argument is premised on the principle that, based on the importance and relevance of their work, charities have a valuable voice to contribute to society through the democratic process. Placing advocacy restrictions on such charities, regardless of their mission or where they are positioned on the political spectrum, limits their freedom of speech and expression, and curtails their ability within the democratic process to reform law (Dunn, 1996, 2008) or engage in influencing social change.

CRA POLICIES

In 2003, the CCRA implemented a new policy statement, *Political Activities*, that defines advocacy as, "demonstrated support for a cause or particular point of view. Advocacy is not necessarily a political activity, but it sometimes can be" (CCRA, 2003a, p. 15). Political purposes in this policy is based on the legal definitions, "to support a political party or candidate for public office; or to seek to retain, oppose, or change the law or policy or decisions of any level of government in Canada or a foreign country" (CCRA, 2003a, p. 16). The policy extends to political activities, giving charities more leeway in conducting public awareness programs. This includes explicit communications, calls for political action, and intentions of activity toward retaining, opposing, or changing a law, policy, or decision at any level of the Canadian government or a foreign country (CCRA, 2003a). Also, this policy implemented a sliding scale of expenditures for political activities ranging from 10% to 20%, based upon revenue levels of charitable organizations. Charities with revenues in excess of $200,000 are capped at 10% and otherwise vary with income down to the lowest category (less than $25,000) at 20% (CCRA, 2003a). This change contrasts with the previous across-the-board 10% expenditure limit.

The CCRA subsequently issued a policy statement *Registering Charities that Promote Racial Equality* (CCRA, 2003b) that essentially broadens the definition of charitable purposes to include organizations that promote or educate about racial equality, work to eliminate racial discrimination, and foster positive race relations in Canada. Thus, the promotion of racial equality is now recognized by the CRA as analogous to mental and moral improvement, which falls under the fourth charitable purpose of "other purposes beneficial to the community." Organizations could also qualify under the purpose of "advancement of education." The rationale provided in the policy for this expansion cites both U.K. and U.S. policies, but selectively zeroes in on race relations issues, ignoring the broader anti-discrimination policies that exist in both countries. More recently, the CRA issued another guidance document, *Upholding Human Rights and Charitable Registration* (2010), in which upholding human rights is considered charitable under all four heads (see above) and can be considered a charitable purpose in its own right under the fourth head, "other purposes beneficial to the community that are considered charitable at law." At the outset, this guidance appears to be more comprehensive than the more specified focus of "promoting racial equality," yet it too has its limitations.

Three gender and sexually diverse organizations in Canada, each operating with different nonprofit models, offer insights into how they function under voluntary sector regulations. Their respective mandates and means of pursuing social justice for the gender and sexually diverse dictated which model

each settled for in order to meet their purposes. Egale Canada is a national multi-issue LGBT rights nonprofit organization, which set up a charitable arm to allow it to pursue its advocacy work under the former and public education work under the latter in order to reap the benefits of the charity system. This model notwithstanding, the restrictions on advocacy are no less felt:

> I mean it's—obviously it's a headache. And it's an administrative headache, in terms of having to run parallel organizations when you have limited resources. So, there are huge issues with respect to it. And the tax receipts, the filing, the administrative stuff is a nightmare … It restricts what we can do as an organization … Because when you want to raise money for a court case, people don't get a tax receipt, and a lot of people donate because of tax receipts … It takes us away from our advocacy work, because we constantly have to figure out where we're going to get our next dollar in order to advance LGBT rights … So, I think it's another way of tying our hands, with respect to advocating for LGBT rights in Canada … we're certainly not given any encouragement or help from government in advancing human rights. (Egale Canada Representative, September 9, 2010)

The Canadian Rainbow Health Coalition (CRHC), also a national LGBT rights organization with a focus on the broad health and well-being issues of these populations, sought and received registered charity status. From its process in attaining such status to its ability to carry out its purposes, the role of advocacy has been impacted:

> [O]ne of the problems that we ran into initially was in our application for charitable status with Revenue Canada. We had to end up changing some of our purposes to remove terms like "advocacy," so we had to change that to "educate" in order to get our charitable tax status … Certainly it affected the language and in some ways it seemed to me to be a little petty to change the word "advocate" to "educate," to basically say the same thing, just a change of word … the problem we had around our mandates and mission statements with Revenue Canada certainly delayed us getting charitable tax status so that was problematic … It certainly causes us to be careful about the advocacy work we do I mean, certainly, when we're dealing with government, and I think that we've tried to do a bit of advocacy with Health Canada and the Public Health Agency of Canada to again get them to address the health issues. And there are Revenue Canada's rules that one has to be careful around the amount of lobbying that they do, certainly political lobbying or what they consider to be political lobbying … I think at times that they're problematic. We work with our community to solve our own issues; but governments at all levels also have the responsibility to address our populations' issues, so I think at times the [political activity] rules have the capability of hamstringing organizations. (Canadian Rainbow Health Coalition Representative, May 22, 2009)

The provincially based Queer Ontario (successor to the now dissolved Coalition for Lesbian and Gay Rights in Ontario [CLGRO]) is a multi-issue progressive, radical nonprofit group that advocates for LGBTQ Ontarians' rights. Strong adherence to their mandate for advocacy and political activities have caused CLGRO/Queer Ontario to question how the voluntary sector is structured and critique the inherent limitations placed on social justice groups:

> You see this is how groups such as our predecessor CLGRO and our current entity Queer Ontario came to the decision to be nonprofit organizations and not formally seek charitable status. These organizations both had "advocacy" right in their respective mission statements. Both were and are highly principled organizations that are strongly committed to their goals and values. We always had a strong sense then, when we were CLGRO, and even now as Queer Ontario, that we will not compromise on advocating for the rights of LGBT people from a progressive queer perspective. Thus, we were not prepared to reshape ourselves to fit governmental regulations at the expense of our work. Now, this is not to say the consideration of becoming a charity wasn't taken up, because it was within CLGRO but ultimately not pursued because it was apparent our mission statement would raise red flags with CRA. It was at this point that CLGRO started raising questions about the system. Why is advocacy, or does advocacy raise alarm bells for the government? Why would fighting for the rights of LGBT people in Ontario not be seen as charitable? Is this not a human rights issue? Why are human rights issues not a concern? (Coalition for Lesbian and Gay Rights in Ontario/Queer Ontario Representative, October 3, 2010)

As is further discussed in the next section, the intricacies and nuances of Canada's charity policies maintain a conservative ideology that does not necessarily embrace change. It can at minimum contain, if not outright constrain, the progressive dynamic voices of its voluntary sector, regardless of whether those voices are coming from the conservative or liberal ends of the political spectrum, as all are restricted by the doctrine of political purposes affecting the sector.

DISCUSSION

Operating from the premise that the voluntary sector (and the varying organizations therein: charities, nonprofits, etc.) has an important role to play in contributing to social justice, critical social work theory calls on actors in civil society to be accountable to those whom they serve (Dominelli, 1997; Fook, 1993; Mullaly, 2002). Such accountability is not reserved for service provision only, but includes addressing systemic and structural issues that can create and perpetuate social injustices for individuals and communities (Carniol, 2010; Adams, Dominelli, Payne, 2009; Mullaly, 1998). This is a deeper level of accountability that goes beyond merely tending to the symptoms of social problems known as "band aid solutions" and getting to the root of issues known as the "causes of the causes" via advocacy for social change.

Yet, it is precisely at this juncture that the values of social justice conflict with current CRA policies. Social justice, which values fairness, equality, equity, dignity, and diversity, for example, is not always aligned with the parameters of legal justice. This is not to say the pursuit of social justice (i.e., human rights) is uncontroversial, but rather part of the role of civil society in a democracy is to identify, raise, and educate about such issues and to grapple with them as a charitable purpose that will ultimately benefit society. Canada's parliamentary democracy neither facilitates nor encourages political activism, particularly when compared to the U.S. republican democracy (Belfall, 1995). The structural apparatus that underpins the voluntary sector, in essence, restricts the extent to which charities may undertake advocacy activities. By extension, the resources of nonprofits are restricted as they cannot issue tax receipts for donations, negatively implicating their ability to fundraise.

These systemic limitations are of particular relevance to the gender and sexually diverse communities who only attained legal recognition in human rights legislation based on sexual orientation (Adam, 1995; Smith, 1999; Warner, 2002) over the past 35 years in Canada but are still pursuing gender identity rights. Long-fought advocacy achieved these legal victories, but now with most human rights battles having been won on the legal justice front, there are many more challenges on the social justice front. Complicating these challenges is the observation that the gender and sexually diverse communities are non-monolithic. Queer liberationists (e.g., Queer Ontario) are considered the most progressive segment of the gender and sexually diverse communities for their discontent with the status quo, their challenging of heterosexist hegemony, and their demand for recognition and legitimization based on difference. As such, advocating for a liberationist type of social justice within a larger neoliberalized gender and sexually diverse community (Duggan, 2003; Richards, 2005; Smith, 2005b)—Egale Canada, for example—that seeks acceptance, respect, and the opportunity to assimilate (hence working with the system) proves challenging (Mulé, 2006) for queer liberationists. The latter find themselves contesting the very political activity restrictions the CRA outlines by undertaking such social justice advocacy.

Although the federal government is slowly broadening its interpretation of the four heads of charity, and particularly of purposes beneficial to the community, the CRA's means of doing so continues to be conservative and restrictive. The 2003 policy document *Registering Charities that Promote Racial Equality* (CCRA) was curious in that this commendable guidance was nevertheless limited to the one social location in the absence of so many others in multicultural Canada. What underscores the design and development of this policy is an implicit ideologically driven heterosexist discourse that fails to acknowledge or recognize gender and sexually diverse populations. It would be another seven years before the CRA would issue its document *Upholding Human Rights and Charitable Registration* (2010). In both cases the jurisdictions of the U.K. and U.S. are cited as having similar policies and in both cases the CRA was selective in what it chose to highlight.

Given that legal precedent establishes that charitable purposes are premised upon the formal policy acknowledgment of an accepted public benefit, and that generalized anti-discrimination work and the promotion of human rights has been accepted as such in the U.K. and U.S., Canada's initial restricted focus on anti-racism and its more recent and conservatively named *Upholding Human Rights and Charitable Registration* (CRA 2010) could better reflect the breadth of Canadian human rights legislation (ILGA, 2000) and its potential for expansion (CCEW, 2002a, 2003b; CCRA 2003a, 2003b; Charity Commission News, 2003; IRS, 2002). Both of these policies place a heavy emphasis on upholding existing law, underscoring the limitations on its *Political Activities* policy (CCRA, 2003a) that charities operate under. In addition, a review of the permissible purposes and activities of the aforementioned two policies emphasize education/service provision, preaching, research and analysis, and public awareness as acceptable. Although these activities do verge on advocacy, charities cannot explicitly pressure the government to enact or alter legislation.

The CCRA's *Promotion of Racial Equality* policy document (2003b), with its named sole focus on the elimination of racial discrimination, falls short of, and thus is contradictory to, the broader parameters of Canadian human rights legislation. For example, opposing homophobia and heterosexism would also be conforming to existing laws, yet this is explicitly absent from this policy. The CRA's *Upholding Human Rights and Charitable Registration* (CRA, 2010) expands the terrain to include other minorities such as the sexually diverse (e.g., lesbians, gays, and bisexuals). However, this policy's implicit stance of providing a public benefit based on existing law excludes minorities who are not legally protected from discrimination. Therefore, minorities based on gender identity, such as transsexuals, transgenders, and

intersex, would fall outside the purview of this policy given their lack of protection in Canadian human rights legislation.

The representative system in Canada, contrary to both the U.S. and U.K., has not adapted to interest-focused groups and their representation in the democratic process (Pross, 1986). Given this, how do voluntary sector regulations ensure that all charitable purposes are respectful of Canadian human rights legislation? It would be beneficial if the CRA adopted what the U.S. and the U.K. currently have. Both countries include definitions in their charitable purposes that broadly address discrimination and promote human rights, domestically and abroad, as a valued contribution to democracy and social development. And although the U.K. and U.S. also have similar limitations on political activities, the iteration of their respective policies is not nearly as constrictive. The CRA's *Upholding Human Rights and Charitable Registration* (2010) focuses on the limits rather than the potential achievements of the policy.

In Canada, advocacy legitimacy is based upon tax rules rather than broader principles of democracy, resulting in an unclear concept of advocacy premised on highly restrictive court definitions (Phillips, 2003b). Yet it is noteworthy that the CCRA made an attempt to expand both its definition of permissible political activities and its corresponding expenditure limits (CCRA, 2003a). The former contributes to a clearer understanding of the extent to which charities may engage in advocacy work involving political activities and the latter is an attempt at levelling the internal field of charities with regard to resource expenditures of larger versus smaller charities. Although this policy provides some degree of clarification regarding political activities, its impact is rather limited in the absence of an expanded definition of charitable purposes. A mathematical calculation of the expenditure limits reveals a valiant attempt at addressing the imbalance of influence based on the size of charitable organizations, but one with limited success as larger charities are disproportionally advantaged.

The attempts of CRA to further clarify what is and is not permissible for charities to engage in regarding human rights, political activities, and thus advocacy can be described as meagre at best, for such policies continue to be undermined by the persistence of the doctrine of political purposes. A doctrine has been developed through the courts over the past few centuries based on a series of legal test cases on the role of political purposes, often conflated with advocacy, in the work of charities. Attempts at distinguishing charity and politics (i.e., partisan versus nonpartisan politics, political activities, lobbying, advocacy, and influencing the public) via jurisprudence have been found to be inconsistent, with some cases being superficially justified and others historically inaccurate (Parachin, 2008). The rationale for this doctrine includes being a time-honoured practice, the authority of the law as it currently stands, judicial incapacity to rule on public benefit derived from political purposes (Drassinower, 2001), and charity and politics being described as merely "just different" (Parachin, 2008). Although the doctrine allows for a certain amount of political activity, what remains elusive to charities is the indeterminate line at which such activity no longer is permissible. This dilemma is further complicated by the asserted incompatibility of charity and controversy (Harvie, 2002; Sacks, 1960). The inconsistency of the doctrine of political purposes completely negates the reality that for some charities controversy will be at the core of their purposes. This issue also intersects with the concept that promoting a point of view is political while the advancement of religion is charitable and the tension that lies therein (Parachin, 2008) is only mentioned here as this issue is much greater than the purposes of this paper.

Advocacy and the LGBT movement in Canada

The Canadian Rainbow Health Coalition, Egale Canada, and Queer Ontario are three of a limited number of gender and sexually diverse organizations that take up political advocacy work, and as such they are

at the forefront of the LGBT movement in Canada. These three gender and sexually diverse organizations each operate under different models within the voluntary sector. The Canadian Rainbow Health Coalition sought and obtained charitable status, but not without having to revise the iteration of its mission and having to closely monitor its advocacy activities as a result. Egale Canada essentially runs as two organizations, one of which is established as a registered charity. This not only doubles the administrative work and limits its focus on advocacy, but also requires it to closely self-monitor the activities that are advocacy based so as not to attract suspicion about its purposes.

Queer Ontario quite consciously opted to be a nonprofit organization due to advocacy being an integral part of its mission, and based on its predecessor's (CLGRO) work on the issue both internally and to a limited extent within the VSI (see earlier CLGRO/QO quote). Yet Queer Ontario operates on a very limited budget due to this decision. In essence, what is revealed here is that regardless of their operational models, all three are experiencing limitations in being able to fully carry out their respective mandates involving advocacy work. The implications for the progress of the gender and sexually diverse movement are concerning. Although the limitations expressed can be extrapolated to other social justice movements within the voluntary sector, for the gender and sexually diverse their general oversight and awkward referencing during the VSI (VSI, 2002a) and resulting CRA policies (CCRA, 2003b; CRA, 2010) demonstrate an ongoing sense of not being fully recognized.

Analytically, the themes of power imbalances to cultural repression, from discriminatory privilege to subjective politics and systemic bias, both within the voluntary sector and its regulators are worthy of closer examination in four contexts. First, the limitations inherent in *Promotion of Racial Equality* (CCRA 2003b), and the way the VSI structured and referenced racial and cultural groups, both excluded numerous other groups protected by Canadian human rights legislation. Second, the non-recognition of lesbians, gays, and bisexuals as a cultural group defined by sexual orientation is culturally repressive and limiting. Third, ignoring legally unprotected gender minorities such as transsexual, transgender, and intersex people sets up a systemic bias based upon privilege (CRA's 2010 *Upholding Human Rights and Charitable Registration*). Lastly, by focusing narrowly on definitions of racism and racial discrimination (CLGRO, 2003) or upholding current human rights laws, these policies undermine the experience of inequality felt by numerous minority groups and individuals with intersectional minority status. In essence, the kind of barriers gender and sexually diverse populations face in general society is mirrored in the voluntary sector's review and current structure. Ultimately, this can hinder attempts at reducing homophobia, transphobia, and heterosexism in Canadian society.

To be adequately heard within Canada's democratic society, gender and sexually diverse communities require the capacity to advocate on a level playing field. This lack of capacity is reflected in the absence of a formal concerted voice coming from gender and sexually diverse communities across Canada. Although Egale Canada had identified the Voluntary Sector Initiative as an issue (Egale Canada, 2003), it did not take any formal steps to address its concerns at the time, partly due to a preoccupation with attaining same-sex marriage rights. CLGRO, because of its limited resources, was only able to monitor the VSI process, make submissions to the CRA's 2003 proposals on political activity and the elimination of racial discrimination (CLGRO, 2003), and host a community forum. CLGRO has since dissolved and its successor Queer Ontario (2010) lists advocacy and activism within the voluntary sector as one of its numerous concerns:

> [P]eople are not fully aware of the complexities of the voluntary system and how it works, including people within the LGBT communities.… This speaks to the kind of

> in-depth analytical processes CLGRO would engage in, that many other LGBT groups didn't. It's why we became interested in the process of the Voluntary Sector Initiative (VSI). Even there, had we the resources to contribute more time and attention to it, we would have, but ultimately we only provided feedback on guidelines CRA produced in the midst of the VSI and we also hosted a public forum in our communities on the issue. And as it turns out, even that limited input on our part, turned out to be the only input from an organized LGBT body, as far as we know. (Coalition for Lesbian and Gay Rights in Ontario/Queer Ontario Representative, October 2, 2010)

Because of how charities are regulated, efforts to change laws and/or government policies and influence public behaviour and community opinion, on the part of all of its actors, is highly controlled and restricted (IMPACS, 2001b; IMPACS & CCP, 2002). This restrictive atmosphere keeps registered charities and the people they serve systemically oppressed. The lack of recognition of gender and sexually diverse populations within broader voluntary sector policy only further silences their voices and limits their impact in affecting social change outside the courts. Even beyond gender and sexually diverse populations, the current Conservative government has created a hostile environment for organizations that engage in advocacy work (Brennan, 2010; Ward, 2010).

Implications for the voluntary sector

The current political environment is an unfortunate one for the broader voluntary sector as it will require political will at the federal level to address the changes required to better acknowledge the importance of advocacy in the work of the sector. The limiting effects on advocacy work undertaken by the gender and sexually diverse communities can be extrapolated to the voluntary/nonprofit sector at large. Although the Panel on Accountability and Governance in the Voluntary Sector, under chair Ed Broadbent, brought this issue to the government's attention and CRA policies were subsequently updated to reflect broader policy changes, no federal party has taken up the explicit issue of advocacy and its limitations in the voluntary sector (Panel on Accountability and Governance in the Voluntary Sector, 1999).

Legally, charities have been generally conceptualized as separate from advocacy and associated political activities as argued in the doctrine of political purposes (Parachin, 2008). Challenges to these legal constraints are required—with the plural emphasized—as some specific cases have done just that (see Parachin, 2008). Clearly more is required if the broader legal context is going to shift. A major disadvantage to nonprofits without charitable status is their inability to raise funds in the absence of "credibility" that comes with being a charity. What will instigate such changes will be a collective voice of charities and nonprofits within the voluntary sector that are most directly affected. Ideally, a collaborative effort on the part of the major sectors (public, private, and nonprofit) could encourage a concerted change, yet this scenario is highly unlikely given differing interests and losses that would be felt by some in levelling the field. The most affected organizations (recognizing that not all are affected) will need to organize and inform themselves, then strategize on how and where to call for a reconceptualization of charities and nonprofits that see the value and importance of advocacy as an integral and indispensable part of their work for social justice within Canada's democratic system.

CONCLUSION

Although several attempts have been made to modernize the voluntary sector in Canada, this study found that the designation of charitable purpose, the lack of definition of "advocacy," and what is

considered permissible political activity restricts both registered charities and nonprofits in their participation in policymaking. Contributing to these restrictions is how the registered charities are regulated under the Income Tax Act and an adherence to the doctrine of political purposes.

Furthermore, this paper's focus on gender and sexually diverse activist groups, as one example of a social justice–seeking constituency, with mandates of social change, found that regardless of status, they were all negatively affected by advocacy regulations. Shortcomings were found in the CCRA's *Promotion of Racial Equality* policy (2003b), which simultaneously highlights redressing one form of discrimination and oppression while omitting all others. This stand contradicts Canadian human rights legislation and the CRA's recent (2010) *Upholding Human Rights and Charitable Registration* policy.

The price paid for silencing minority and disenfranchised groups is that some of the most informed voices on social issues are not being permitted to participate on a level playing field with their public and private sector counterparts. This denies Canadian citizens the resourceful breadth and depth of knowledge that the voluntary sector can offer in policymaking processes. A reconceptualization of charity and the systemic approach to nonprofits is required at the political and legal level, spearheaded by grassroots organizations within the voluntary sector, to challenge current restrictions on advocacy and the detrimental effect on social justice.

NOTES

1. For the purposes of this paper, gender and sexually diverse populations refers to individuals who identify as lesbian, gay, bisexual, transsexual, transgender, two-spirit, intersex, queer, and/or questioning.

2. To be deemed a charity, an organization must apply for such status through the regulating body of their respective country. Charitable status allows the organization to issue tax receipts for donations received, resulting in higher fundraising returns and qualifying them for public funds by numerous funding bodies that require such status. Yet, charities are restricted in the degree to which they can engage in advocacy or lobbying activities. Nonprofit organizations are not under charitable regulations and thus are free to undertake advocacy and lobbying activities to the extent they choose. Yet, these organizations cannot issue tax receipts for donations received and have limited options for public funds, and thus have greater difficulty sustaining themselves.

3. A federal bill that would have provided explicit human rights protections including against hate crimes based on gender identity and gender expression, got as far as the Senate, but died before being voted on due to the 2011 federal election call.

4. Sexual orientation has been included as a prohibited ground for discrimination in human rights legislation federally in Canada since 1995 and in all provincial and territorial human rights legislation throughout the country.

5. Interviews with government officials were conducted for the study but have not been utilized in this analysis.

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The Benefits and Economic Value of Community Recreation: Proposal for an Analytical Framework Based on an Exploratory Study

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ABSTRACT

This article presents the results of an exploratory study on the impacts of a program provided by a community recreation centre. The study proposes an analytical framework to assess the impacts of recreation on young people and refers to product and impact concepts developed by Marée (2005). The proposed framework includes dimensions that are sufficiently precise to grasp the impacts of community recreation centres (benefits, savings, impacts on individuals, life settings, and society), yet also sufficiently broad to allow for the evaluation of the impacts of other social endeavours.

RÉSUMÉ

Cet article présente les résultats d'une recherche exploratoire qui étudie les effets d'un programme d'un centre communautaire de loisir. La recherche propose un cadre d'analyse des impacts du loisir chez les jeunes qui prend appui sur les concepts de produits et d'impacts développés par Marée (2005). Le cadre d'analyse proposé comporte des dimensions suffisamment précises pour appréhender les impacts des centres communautaires de loisir (bénéfices et économies pour les individus, les milieux de vie et la société), mais il est aussi suffisamment large pour évaluer les impacts d'autres entreprises à vocation sociale.

Keywords / Mots clés

Community organization; Social performance; Economic value; Recreation /
Organisme communautaire; Performance sociale; Valeur économique; Loisir

INTRODUCTION

The importance of community intervention to prevent school drop-out[1] (Cook, 2008; Mercier, 2000) and its influence on social relations and academic perseverance (Roy, 2003; Bourdon, Charbonneau, Lapostelle, and Létoumeau, 2007) has already been shown. The same can be said for the contributions made by Quebec's *centres communautaires de loisir* (CCL) (community recreation centres) to the prevention of social problems, the networking capabilities of people and families, and community development (Fréchette, 2000). However, the economic value of the impacts of community recreation continues to be a subject of debate, especially as conventional financial indicators do not provide information on the spin-offs of programs offered by community and social economy organizations. Despite the imprecision and difficulties inherent in the notion of social utility (Marée, 2005), as well as the pitfalls presented by its evaluation and measurement, this study aims to offer indicators for understanding the impacts of community recreation and, more generally, to contribute to the development of a framework for analyzing the performance of social organizations.

This article is organized as follows: We will first present the general issue of the value of the impacts of recreation. We will then develop an analytical framework and present the program studied as well as the methodology used. Next, we will present and discuss the data collected and proceed with an analysis of the economic value of the program under study. In conclusion, we will identify possible avenues for future research.

WHAT IS THE VALUE OF RECREATION?

In this article, recreation refers to community-based educational or sports activities that contribute to the overall development of individuals and the ability of citizens to take charge of their local community (Fédération québécoise des centres communautaires de loisirs, 2001, p. 40). Thus, recreation has a value for individuals and groups and also constitutes a means of improving the functioning of societies. These views are in line with the findings of many studies.

In his meta-analysis of studies on the effects of recreation on young people, Torjman (2004) shows that recreation has positive spin-offs for the social relationships between adolescents and their peers and teachers. Torjman also points out that recreation has an impact on the behaviour of young people with regard to the prevention or reduction of negative behaviour, stress and petty crime, alcohol or drug consumption, and eating disorders. Recreation can also stimulate the adoption or maintenance of positive behaviours such as involvement in volunteer activities and peer and mutual support, as well as increased self-esteem, and it has positive effects on social participation, social cohesion, and intercultural understanding.

Torjman's (2004) assessments concur with those reported by Fréchette (2000); namely, that recreational activities aimed at developing the potential of individuals, supporting life settings (e.g., school and family), and, more generally, improving life conditions for vulnerable groups are beneficial (Fréchette, 2000). There is therefore a consensus that the enrichment of the social and educational capital of settings constitutes one effect of recreation in a local community or institutional setting (Fréchette, 2000, 2002).

The studies of Browne, Byrne, Roberts, Gafni, and Whittaker (2001) also discuss the effect of recreation in the context of social-community interventions and its economic value. These authors argue that recreation interventions help children who have emotional problems and whose parents are on social

assistance maintain their social, physical, and academic skills at a level comparable to those of so-called healthy children. These interventions also impact mothers with mental health problems, for example, by helping them to reduce their use of medication, to make use of counselling services, or even to go to food banks.

Table 1 - Spin-offs of recreation

Problems encountered School absenteeism Consumption of alcohol/drugs Anti-social behaviour Isolation School drop-out/social exclusion Vandalism Attention deficit Aggressive behaviour Negligence and lack of hygiene Sources: ACLP (1998); CPRA (1998); Bouchard et al. (1994);; Krichbaum & Alston (1994); NRPA (1994a,1994b); Montelpare et al. (1993); Crompton (1993); Shilts (1991); Torjman (2004); Beauvais (2001).
Personal skills and attitudes promoted among the young participants Self-esteem/self-confidence Leadership Improvement of school grades Development of professional or personal goals Crisis management Perseverance Hygiene habits Mutual support Development of life habits compatible with work and social life Positive relationship with adults Sources: ACLP (1998); Driver et al. (1991); Haggard & Williams (1991); Sonstroem (1994); Fréchette (2000); Beauvais (2001).
Collective effects identified Feeling of belonging to the school community Keeping young people in the regions Positive school climate Network of mutual academic support Recreation in rural communities Positive representation of recreation in the regions Improved representation of teens among adults (teachers, parents, and townspeople) Support for vulnerable families Sources: Fréchette (2000; 2002); Fréchette et al. (2002 and 2003); MELS (2005).

Lastly, US studies (CPRA, 1998) indicate that recreational programs have preventive effects on young people with social problems, allowing for substantial savings in social programs. Table 1 presents a summary of studies on the spin-offs of recreation for young people based on different problem areas.

In light of the consensus on the benefits of community recreation, and given the investment that such

intervention requires, the need to measure its economic value has become increasingly apparent (Quarter, Camichael, Sousa, & Elgie, 2001). The fact that conventional financial statements do not reflect the economic and social performance of nonprofit businesses has been generally recognized for some time; it is also acknowledged that there is a lack of standardized and generally accepted performance indicators for social organizations comparable to the financial indicators used to measure for-profit businesses (Renaud & Brésil, 2006). Authors have even criticized conventional accounting for creating the perception that collective businesses are consumers of resources rather than creators of value (Quarter, Mook, & Richmond, 2003a).

There is therefore a consensus on the need to develop accounting practices, indicators, and measures that adequately reflect the characteristics and specificities of social economy organizations (Bouchard, Leblanc, & Michaud, 2005). In this context, it is important to underline the efforts that have been made to identify social and economic indicators (CSMO-ÉSAC, 2004, 2007) as well as the work dedicated to the development of an analytical framework that can be used to identify the basic parameters for measuring the social utility of businesses in the social economy (Gadrey, 2003 and 2004; Bouchard, Fontan, Lachance, & Fraisse, 2003; Bouchard, Bourque, & Lévesque, 2000). Finally, the application of a strategic approach and a performance-based management system in nonprofit organizations represents another way of evaluating the social economy and contributes to creating a bridge between management sciences and the social economic sciences (Renaud & Brésil, 2006; Shwu-Ing & Jr-Mong, 2008). However, there is still substantial work to be done in terms of developing a "social accounting" system (Quarter, Mook, & Richmond, 2003b).

A CONCEPTUAL FRAMEWORK FOR STUDYING THE COLLECTIVE IMPACTS OR SPIN-OFFS OF COMMUNITY RECREATION IN ACCORDANCE WITH THE ECONOMIC VALUE APPROACH

The analytical framework of Marée (2005)

Collective impacts refer to the advantages that communities draw from the actions of a social program, including positive effects on the public budget, improved functioning of the job market, or strengthened social links (Marée, 2005). These impacts justify the existence of public policies in support of social economy corporations; their study allows for a comparison of the returns on investment of the sums allocated in order to promote the optimal distribution of public funds. Collective impacts can be direct, in which case the public programs or policies bring results for the people targeted, or indirect, meaning that the programs or policies have consequences (adaptability, productivity, greater human capital, improved job market) which, in the short or medium term, affect people or organizations that are not the direct beneficiaries.

Marée (2005) also suggests that social programs generate three "products": a main product (a job, for example, in the case of a work integration program), support products (e.g., an increase in family income), or derivative products (e.g., collective well-being). Marée associates three categories of impacts with these products:

- impacts related to the program as such (impacts on the economy, avoidance of expenses, impact on the public budget, increase in social capital);
- impacts attributable to the organization's activity (e.g., local development); and,
- impacts generated by the organization's production and methods (economic and social innovations, increased productivity).

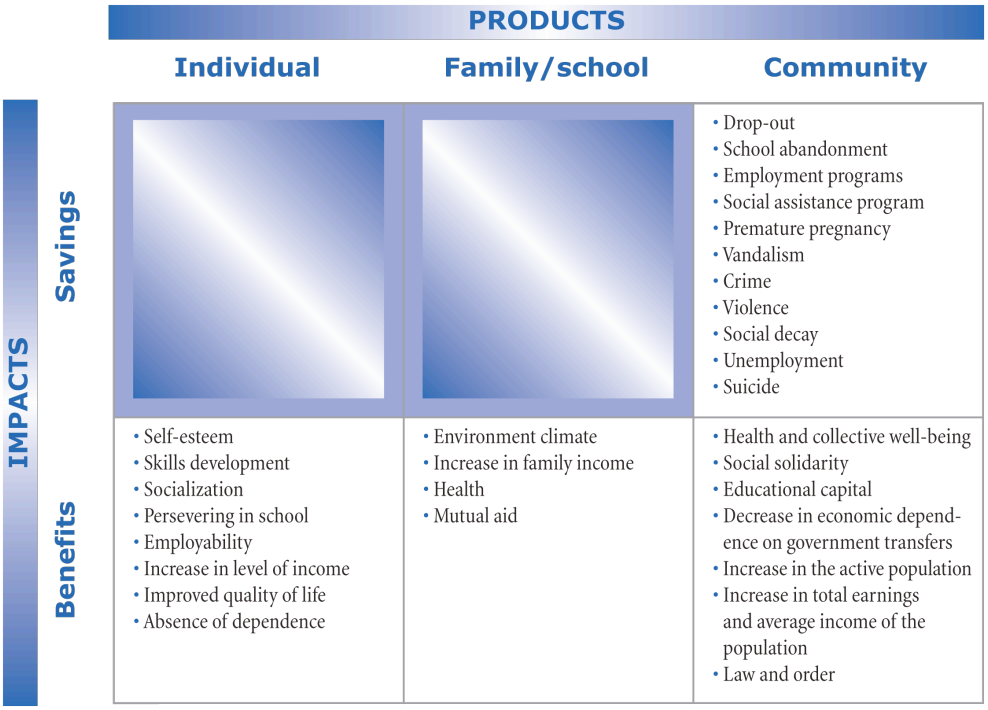
According to Marée (2005), a measure is a quantitative estimate of the impact based on indicators. An indicator designates a non-monetary value of the impact, while a measure (or value) refers to the expression of this indicator in monetary terms. Some impacts can be measured while others cannot; the latter can thus only be expressed qualitatively or in non-monetary quantitative terms.

Lastly, Marée (2005) evaluates collective impacts according to the economic value approach; that is, based on the market price or the consent to pay individuals for non-market goods, with the consent to pay being generally determined through surveys with individuals. This approach has conceptual problems (that of the non-determination of preferences, in particular) and raises methodological issues, but it retains a certain potential for assessing the value of non-market goods (Marée, 2005). However, while the economic value approach can be a reliable tool for evaluating non-market goods and collective goods, in particular, it alone does not suffice in terms of clarifying decisions pertaining to public matters. Marée thus favours the development of approaches based on non-monetary indicators of non-market production and multi-criteria analyses, a path that has been relatively disregarded to date.

The analytical model of community intervention through recreation

Based on the summary of the spin-offs of recreation established in Table 1 and the concepts and framework developed by Marée (2005), we established the following model (Figure 1):

Figure 1 – Analysis model of community intervention through recreation



The framework summarizes the impacts reviewed and presents them by referring to the hypotheses developed by Marée (2005):

1. Community recreation generates direct and indirect *products*; that is, for the individuals targeted by the activities, their life settings (family, school environment), and the broader community. These products can be observed in the short, medium, or long term. The notion of *product* makes it possible to situate the *impact of recreation* at one of the three levels of analysis: the individual targeted by the program, their family or immediate environment, or the extended community from which they come.
2. The *impact* element refers to the idea that *recreation* generates *savings* (e.g., savings of funds otherwise spent on the education of young drop-outs, employment programs, social assistance programs) and *benefits* (e.g., personal well-being, increased employability, improvement of health and collective well-being).
3. The *benefits* are observable at each of the three levels of analysis but are generally difficult to quantify in monetary terms. The *savings* are, for their part, normally realized at the level of the community and are consequently measurable; it is acknowledged that an individual or family can invest monetarily in a private intervention (consultation, therapy, etc.). However, given that community recreation primarily affects the most vulnerable individuals and groups, we postulate that savings at the individual and family level are non-existent or, at best, minimal.

CASE STUDY

The community recreation centre, Service d'animation des jeunes de l'Outaouais (SAJO), which offers programs for young people, is one of 83 centres communautaires de loisir (CCL) (community recreation centres) in the Fédération québécoise des centres communautaires de loisir (FQCCL). CCLs are organizations dedicated to the development of individuals, families, and the community through community recreation, popular education, and community action. By encouraging the active participation of its users, these centres allow users to discover their qualities and skills, experience solidarity, and organize in order to promote the social development of their milieu.

Founded in 1970, SAJO operates in the rural region of the Petite-Nation in Outaouais within the Papineau Regional County Municipality (Papineau RCM). The Papineau RCM comprises 18 towns and has no highway infrastructure. Most of its towns have fewer than 1,000 inhabitants and none has more than 5,000 inhabitants (Duval & Gagnon, 2006). Since the mid-1980s, the region has experienced an exodus of young people. Subsequently, the proportion of people aged 34 and under has dropped drastically: of the 51% represented by this group in 1986, only 36.6% remained in 2001 (Duval & Gagnon, 2006).

SAJO's mission is to promote a positive life setting for all, and in particular for people going through difficult life situations that are likely to destabilize them with regard to their family life, social integration, or personal development. In concrete terms, the centre implements activity programs that call on many disciplines and apply various educational and pedagogical strategies.

The emergence of the Bouffée d'oxygène (BO_2) program

Over the course of the year 2000, recreation workers in the Papineau RCM observed the following: recreational activities for adolescents of the Petite-Nation region were limited and transportation services were non-existent. These findings brought to light the insecure conditions faced by individuals and families, the isolation of the population, and the lack of available resources to organize group activities or counter the exodus of young people.

The directors of the local school board (Commission scolaire au Cœur-des-vallées, CSCV) were also concerned about the situation of young people, and decided to invest in special projects to motivate young people and involve them in various forms of learning (Savoie-Zajc & Lanaris, 2002). This resulted in SAJO's mandate to develop a program for adolescents in the Papineau RCM. The Bouffée d'oxygène (BO_2) program was thus created, with one of its components (the Kamis project) being offered at the Louis-Joseph-Papineau High School in Papineauville. SAJO provided a facilitator to create and lead sports and recreation activities at the school during free time; that is, during recess, at noon, after school, and on weekends. The project enjoyed tremendous success. Over the course of the 2004–2005 school year, the BO_2 program recorded 10,482 sign-ups (SAJO, 2005): nearly 60% of students in the school participated in organized activities during their lunch hour, and approximately 35% of students participated in at least one extracurricular activity in the evening that same year (SAJO, 2007). In 2008, the number of sign-ups rose to 23,459 (SAJO, 2008).

METHODOLOGY

General approach

The objective of this study was to identify and evaluate the impacts of the BO_2 program to broaden our knowledge of the performance of social organizations.

The study focused on individuals because the program's activities were easier to define at the individual level. More precisely, we sought to identify the impacts and products generated by the program by studying the life paths of five young people who participated in the program.

Data collection

Three data collection tools were used in the study: non-structured interviews, a discussion group, and document analysis.

The interviews were conducted with two workers from the community recreation centre and one administrator from Louis-Joseph-Papineau High School, where the program took place. The interviews aimed to gather the respondents' perceptions of the spin-offs of the program. The respondents were encouraged to express their views on how the program had affected young people, the school, and the community.

Holding a discussion group is a method largely used in the framework of exploratory studies (Morgan, 1997). The technique consists of bringing people together and stimulating a discussion by starting from a group interview guide touching on the themes and subthemes retained in the study and then drawing up a partial and later a global summary analysis of the discussion (Simard, 1989). The main objective of the

discussion group was to identify the paths of different young people who had been active in the BO_2 program. The group was composed of five representatives from the school (the principal and four teachers) and one worker from SAJO. The discussion lasted a little over two and a half hours. At the request of the researchers, the group identified five young people who had participated in the program. In choosing the five cases, participants were asked to adhere to two requirements: 1) choose cases that presented different situations; that is, young people with different problems (learning disabilities, social integration problems, etc.) and 2) choose three cases involving a girl and two cases involving a boy. The sample is decidedly biased given that the cases were selected on the basis of particular characteristics responding to specific objectives (Mayer & Ouellet, 1991); also, the choice of the subjects was based on "expert opinion" (Lefrançois, 1991), in this case the school and community representatives, because the latter were considered to be in the best position to identify the cases to be studied. This approach is, however, justified by the exploratory nature of the study.

To ensure reliability, the interviews were recorded and transcribed; the discussion group was led by three individuals, and notes were compared and discussed.

Lastly, we analyzed internal SAJO documents, statistics, and reports of the Cœur-des-Vallées School Board, as well as general documents (results of national censuses from 2001 and 2006, statistical bulletins on education, budget regulations for school boards established by Quebec's Ministère de l'Éducation, du Loisir et du Sport, and information documents on job assistance and social security programs). The goal of this documentary analysis was to document the impacts observed and to collect data that would make it possible to determine the economic value of these impacts.

Despite the methodological precautions taken by the researchers to ensure the reliability and validity of the data collected, the limitations inherent to this research must nevertheless be recognized. First, it should be noted that it is impossible to isolate the impact of a recreation program from that of other organizations or people involved in a young person's life, such as school, family, and other groups. Moreover, no control group was used in this study (that is, one group having undergone a community-based intervention and the other not) in order to evaluate the real impact of the BO_2 program and provide a comparison over time (before and after) (Duncan & Magnuson, 2003). Also, it was impracticable to take into account the characteristics of the young people (e.g., mental health problems) and their surroundings although it is recognized that students' networks (family, friends, and others), the mobilization of school teams, and a positive relationship between young people and the institutional system contribute significantly to preventing school drop-out (Beaumont, Bourdon, Couture, & Fortin, 2009; Vultur, 2009; Cook, 2008; Marcotte, Royer, Fortin, Potvin, & Leclerc, 2001; Rousseau, Tétreault, Bergeron, & Carignan, 2007; Molgat, 2007; Bourdon & Vultur, 2007). Another limitation concerns the impossibility of generalizing the results due to the small number of cases studied. We believe, however, that the exploratory nature of the study explains this limitation and justifies the publication of the results. Lastly, the degree of savings realized is based on the hypothesis that there are public programs that aim to minimize or abate the effects of school dropout (adult education and employment assistance programs in this study). Because it is impossible to confirm that public programs exist for other problem areas, or that these are sufficiently financed, the quality of the calculation of savings is strongly compromised.

PRESENTATION OF RESULTS

Benefits of the BO_2 program for the community and the school

The documentary analysis indicated that the general situation of the Papineau RCM improved slightly between 1996 and 2001, and that this progress accelerated somewhat between 2001 and 2006. The data from the last national census showed, in particular, a decrease in the ratio of economic dependency on government transfers and an increase in the active population (see Table 2).

Table 2 - Socio-economic data for the Papineau RCM

	1996	2001	2006
Average income of the population aged 15 years and over	$19,394	$21,578	n/a
Economic dependence on government transfers	24.0%	23.4%	21.7%
Median income of families	$40,544	$44,775	$47,380
Median income of men aged 15 years and older	$24,013	$25,983	$25,385
Median income of women aged 15 years and older	$14,257	$16,920	$17,314
Active population	8,720	8,880	10,335
Employed population	7,505	7,970	9,420
Participation rate	53.4%	53.1%	56.0%
Employment rate	45.9%	47.7%	51.1%
Unemployment rate	13.9%	10.2%	8.9%

Based on the school board's annual reports, there was progress at the Louis-Joseph-Papineau High School at various levels (decrease in the drop-out rate, vandalism, drug use, etc.).

It is recognized that the improvements observed do not result solely from the implementation of the BO_2 program. However, the 2005–2006 Annual Report of the CSCV makes explicit reference to the contributions of community organizations such as SAJO to such progress. The discussion group participants also confirmed SAJO's contribution to the improvement of living conditions in the region and at Louis-Joseph-Papineau High School. In fact, SAJO was perceived as the key link to a holistic approach to supporting young people.

The data collected during the interviews and discussion group show that the BO_2 program had positive spin-offs on parent-child relationships, the resilience of children living in difficult settings, the climate at the school, the students' overall motivation to go to school, the students' relationships with teachers, and the spirit of mutual support at the school. The program's contribution to the socio-professional integration of young people was underscored and many of the program participants went on to pursue postsecondary education. Although the program was only one of many influences (teachers, social workers, etc.) on these young people, there was a distinct drop in absenteeism and school drop-out rates, while participation in extracurricular activities increased; the school environment subsequently became more stimulating.

Benefits of the BO_2 program for the young people studied

The impacts of the BO_2 program were also noticeable in the five cases studied. The results obtained from the discussion group revealed that the program enabled three of these young people (cases A, B, and C) to pursue and obtain a high school diploma in the regular school system; reduced the harmful effects of

having dropped out for another young person (Case D) by giving this person the tools necessary to integrate into the job market; and helped a fifth young person (Case E) to overcome major behavioural problems. The following sub-sections present a narrative description of the path taken by each of these five young people. It should be noted that the following data come solely from the discussion group and that the young people represented by the five cases were not interviewed

Case A

The first case involved a young person (hereafter referred to as "Case A") whose hyperactive tendencies were controlled by medication. This student was rarely absent from school and displayed a strong need to be active. As this student had been subjected to harassment at elementary school, he/she had become quite intolerant as a teenager. Nevertheless, Case A felt constantly under attack and was always on the defensive. This student's relationships with peers were hostile and he/she tended to be aggressive. In terms of school performance, Case A was not without intellectual resources, but his/her marks were low. Case A's behaviour could not be explained by his/her family environment, but the CLSC (local community service centre) nevertheless offered follow-up support to both the family and Case A.

When Case A began high school, he/she took part in a support program for students who were experiencing difficulties, contributed to the development of the student radio station, and joined a student exchange program. Case A had problems with social integration. This student demonstrated leadership skills but was not very open to other people's ideas and showed even less tolerance when his/her ideas were challenged, in which case he/she would become verbally aggressive. Because of this behaviour, Case A was forced to leave the student exchange program against his/her will and not without some fuss. In referring to this, one participant in the discussion group said, "We had a rough time of it!"

The BO_2 program reached out to Case A and those around this student noticed a significant change in his/her behaviour. This young person, whom the respondents described as a "time bomb," became much more sensible and reasonable. Moreover, this student's school marks improved. This change was immediately attributed to the BO_2 program and its flexibility. While participating in the program, as elsewhere, Case A sometimes displayed inappropriate behaviour and mood swings, but also showed a strong willingness to participate in teamwork. The BO_2 program made allowances for Case A's behaviour and mobilized his/her energy in a positive way.

To sum up, the following characteristics of the BO_2 program made it possible to assist Case A: the program offered a wide variety of activities at different times of the day and a personalized approach to young people in crisis or who were seriously withdrawn. Thus, each participant was eventually able to get something out of the program, which was not the case in a classroom setting with 30 or so other students.

The program was centred on recreational activities; consequently, the young people who took part were seen not in terms of their differences or problems, but simply as participants. This made it an appealing intervention program compared to social or support services offered to young people, which define themselves first and foremost in terms of the young people's problems. Lastly, isolated young people were *naturally* integrated into the BO_2 program. Recreation workers met students in the hallways or on the school grounds, in the same way that street workers might operate.

In concrete terms, the BO_2 program had an important impact on Case A given that, according to the respondents, this student would very likely not have completed his/her high school studies without it. As it

offered a variety of activities, the BO_2 program gave Case A the chance to discover and develop his/her skills. The respondents, moreover, asserted that the program helped Case A choose a career path since this student decided to pursue postsecondary studies in a helping profession.

Case B

In the opinion of the respondents, Case B was "miraculously saved from the school system." Suffering from physical health problems and difficulties with verbal communication, this young person had been constantly rejected by his/her peers. This student had become aggressive and often got into fights. Case B had experienced many failures in extracurricular activities. His/her academic performance was poor.

The room used for the BO_2 program — "the shack" — became a haven where this student could go during "down time" instead of remaining isolated in the library as he/she had tended to do in the past. The BO_2 program helped Case B improve his/her communication skills and this student made significant progress in this regard, opening up the possibility of making friends.

Without the intervention of the BO_2 program, this withdrawn young person would have continued to be isolated. The respondents agreed that the program helped Case B come into his/her own, develop his/her strengths, and set aside his/her weaknesses. Case B began to make friends, feel accepted, and take pride in his/her successes in these extracurricular activities. Case B developed problem-solving strategies that helped this student overcome his/her difficulties and adopt appropriate social behaviours. Case B also made progress academically. His/her marks rose from a 50% average to a 70% average, thus allowing this student to follow the regular academic program. Case B's parents expressed their gratitude to the program workers, saying that it was the BO_2 program and its Kamis component that enabled their child to stay in school.

Furthermore, the BO_2 program proved to be a space in which different workers could come together to support Case B. The discussion group participants expressed the view that, in terms of intervening to support students, the school team was faced with limits that the community-based nature of the BO_2 program enabled it to overcome. Case B managed to carve out a place for him-/herself. This young person even won a prize for the student who had made the most progress, and his/her academic achievements were recognized on several other occasions as well.

Case C

Case C had experienced a significant bereavement and displayed a very self-effacing personality. This young person had grown up in a family that was facing many problems. The family's socio-economic difficulties had brought them to collect social assistance. Case C had been exposed to domestic violence, family breakup, drug addiction, and the world of drug dealers. The respondents said that this young person "had raised him-/herself" and was doing quite well given the disadvantaged circumstances. They nevertheless acknowledged that Case C had a negative self-image and low self-esteem. This student sometimes simply ran away when there were tensions in a group setting and often went to "the shack," where he/she participated in several of the program's projects. The program offered a wide variety of activities and Case C took advantage of many of them. These projects and activities allowed this young person, above all, to gain a sense of self-worth, build his/her self-esteem, and develop his/her intellectual resources.

The respondents were categorical on one point: the less time Case C spent at home, the better. Given this context, the BO_2 program became a refuge for this student. Case C stayed until closing time and participated in all the organized activities.

As this student was very intelligent, Case C would probably have obtained a high school diploma without the BO_2 program. However, he/she would most likely not have developed as many personal and social skills. Although Case C's energy was "spread thin" since he/she took part in so many different activities, this student nevertheless mastered whatever he/she took on and received several mentions of honour.

Case D

Case D came from a family that was disadvantaged on several levels (economically, socially, and culturally). This student had been tagged as having limited intellectual resources and was quite behind academically. Case D had a neglected appearance, was often dirty, and had questionable personal hygiene. This young person was rejected by his/her peers. He/she was quick-tempered and manipulative, displayed antisocial behaviours, and had been suspended from school more than 30 times. The BO_2 program "picked this student up" when the system had reached its limits and no one wanted to have anything more to do with him/her.

The respondents felt that Case D's involvement in the BO_2 program had prevented this student from dropping out of school and that it had had a positive effect on his/her personal and social development. Case D learned to keep clean, dress properly, and take care of him-/herself. As one respondent put it, "We sort of raised this kid."

Case D spent time with other young people in the BO_2 program and developed acceptable social skills. This student recognized his/her own limits when it came to dealing with other people, especially in situations in which he/she felt frustrated. A teacher developed a special rapport with one of the recreation workers from the program and sent Case D to see this worker whenever this student was on the verge of losing his/her temper. This collaboration proved to be beneficial and prevented Case D from being suspended and expelled from the school. Once this young person began to grasp the basics of acceptable social behaviour, he/she learned to take refuge in "the shack" whenever he/she was about to blow up. Like Case C, Case D stayed at school in the evenings, feeling more comfortable there than at home with his/her family.

Through the activities of the BO_2 program, Case D discovered a certain talent for art, and this helped build his/her self-esteem. This student persevered and even won a prize for his/her artwork. Case D left school before completing his/her high school studies but continued to participate in other BO_2 and SAJO activities. This young person continued to need support and planned to obtain a high school diploma through the adult education program. Meanwhile, Case D was active in the community, leading activities for young people, and recognized that people's view of him/her had changed.

Case E

Case E arrived at the school after being expelled from another school because of violent behaviour. This young person was raised in a violent family environment and his/her family had broken up. Case E showed the characteristics of a delinquent. This young person took drugs, loitered after school, and did not go home until late at night. This student was thought to be responsible for some acts associated with vandalism and petty delinquency. At school, Case E's relationships with teachers and other students were

troubled and he/she had difficulty integrating into the group. This student's social network was limited and he/she tried using inappropriate behaviour as a strategy for entering into relationships with others. Case E was considered to be at risk of being rejected by the school system.

Case E was first able to integrate into school activities through sports when one of the SAJO workers was assigned the job of coaching the volleyball team. From there, Case E went on to join the Kamis component of the BO_2 program. This young person discovered what it was like to be appreciated by adults and to be valued for his/her personal attributes. This student ended up leading activities for other young people at the school, in line with the philosophy of "activities *for* young people *by* young people" that is so central to the approach of SAJO and the BO_2 program. The troubled behaviour that Case E had displayed in the past gradually disappeared and this student developed leadership skills, became involved in causes that were important to young people, and learned to use his/her intellectual resources.

Case E later earned his/her diplôme d'études collégiales (DEC), a technical college diploma, and worked with troubled youth and delinquent adults. At the time of this study, this young person was pursuing university studies and intended to return to the Petite-Nation region upon their completion.

Summary of Paths

Table 3 summarizes the paths of the five young people: for each case, we will present the difficulties identified, the changes observed, and the benefits attributed to the intervention of the BO_2 program. It should be pointed out that our research approach was based on the perceptions of the respondents and that these perceptions may vary from one person to another. However, the main consensus drawn from the discussion group supports the analysis presented below.

Table 3 shows that for each of the five cases studied, the BO_2 program had positive effects on the young person's self-esteem, skills development, and socialization. More specifically, the program had impacts with regard to employability (four cases), schooling (three cases), and level of income (two cases). Even though these impacts are not measurable, they are considered to be obvious and significant. The same can be said for the benefits concerning school and family, for which improvements were observed in four cases. A greater readiness to engage in mutual support was also observed in one case. Lastly, benefits with a long-term reach were also identified; in particular, improved collective well-being in two cases and increased social solidarity in another case. It should be pointed out that the data on the paths of the young people were echoed in former studies on community recreation (Torjman, 2004; Howard & Peniston, 2002; ACLP, 1998; Tindall, 1995; Bouchard, Shepard, & Stevens, 1994; Krichbaum & Alston, 1994; Montelpare, Yardley & Kannters, 1993; Crompton, 1993; Shilts, 1991; Beauvais, 2001; Driver, Brown, & Peterson, 1991; Haggard & Williams, 1991; Sonstroem, 1994; Fréchette, 2000).

Thus, the data collected were consistent with the knowledge provided by the literature review: community recreation programs working to overcome problems with high social costs are beneficial.

Table 3 – Summary of the data collected on the five young people studied

	Case A	Case B	Case C	Case D	Case E
Difficulties identified	Social integration problems Aggression Loss of control Rejection by peers Attention deficit	Academic deficiency Isolation/rejection by peers Antisocial Aggression dysphasia Potential drop-out Illness	Low self-esteem Had run away from home Petty crime Onset of drug abuse Complicated relationship with family Lack of behaviour models	Academic deficiency Behavioural problems Compulsive lying Rejection Negligence/lack of hygiene Considered a nearly hopeless case	Aggression Consumption Theft, vandalism Antisocial Difficulties with relationships and integration
Changes observed	Success at school Control of emotions Team work Helped peers with extracurricular activities Offered support to a group of students who were behind academically	Team work Local and provincial awards Perseverance Openness concerning the illness Improved academic results	Exteriorization Recognition of his/her strengths Involvement in activities Experienced success End of drug abuse Academic diligence	Crisis management Improved hygiene Dropped out of school but returned later through adult education program Relationships with others Leadership Academic diligence	Integrated into the group Success in sports Leadership Maturity College studies Employment in social intervention in the public sector Academic diligence
Impacts attributed to the intervention of BO_2	Prevention of school drop-out Reduced aggression Development of self-confidence Success at school Socialization	Reduced aggression Self-esteem Returned to school Development of personal/professional goals Socialization Completed a process of problem resolution	Self-esteem Prevention of drug addiction Avoidance of social drop-out and deviance Positive relationship with adults	Healthy lifestyle Behaviour/ attitude compatible with life in society and job market Conflict management Returned to school Socialization	Overcame behavioural problems Socialization Integrated into the group Leadership development Integrated into the job market Personal development Returned to the region

When analyzing the results in light of our analytical framework (Figure 2, see the elements in bold), we found that the BO_2 program effectively generated *benefits* for individuals, family, school, and community. We would also argue that the program generated *savings* because it contributed to:
young people (cases A, B, and C) persevering in the regular school system instead of dropping out, thereby avoiding the greater costs associated with adult education programs which may otherwise have been incurred; giving one drop-out (Case D) the tools necessary to integrate into the job market without needing additional intervention from the public system.

Figure 2 – Analysis of the impacts of BO_2 based on the situation of the cases

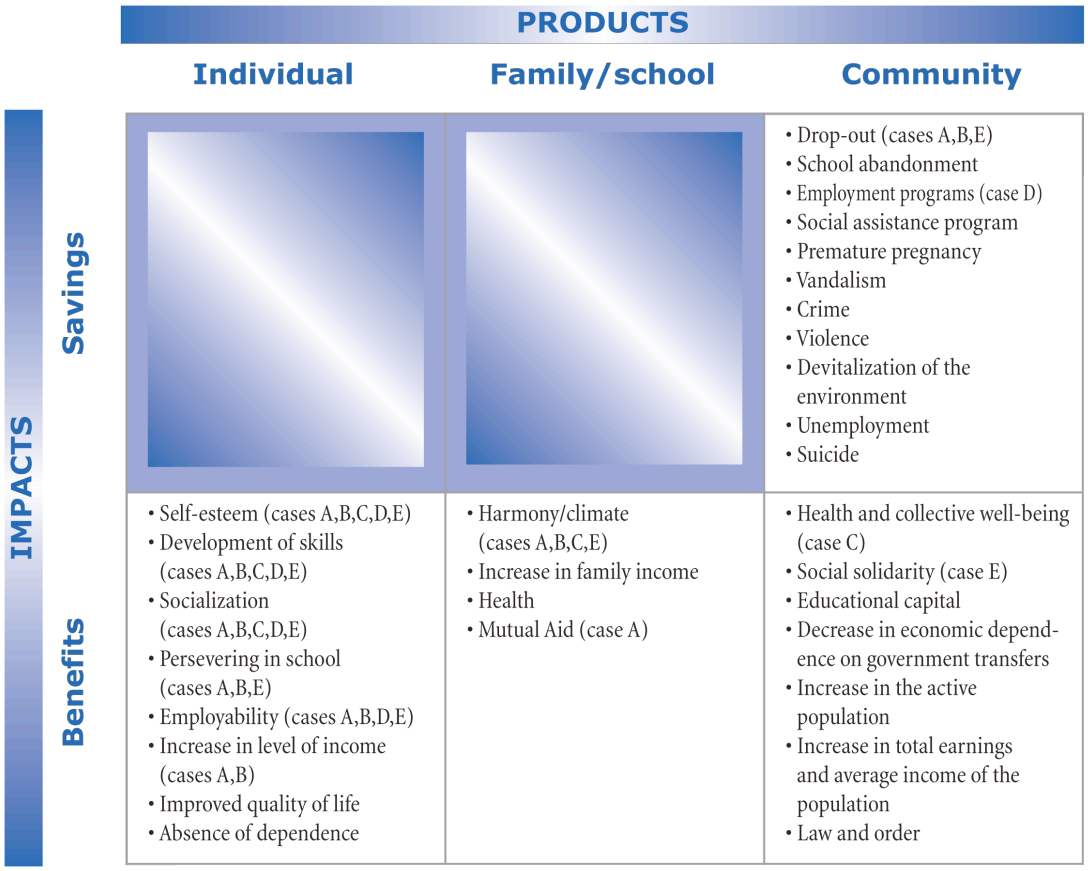


Figure 2 illustrates that the direct effects on individuals are more easily identifiable than the indirect effects that manifest themselves over the medium or long term. However, this conclusion is based more on our methodological choices than on the non-occurrence of the products.

Figure 2 also illustrates that the benefits are more easily perceptible than the savings. This finding is, for its part, fully consistent with the conclusions of Marée (2005), which state that impacts are not always translatable into monetary terms and that there is a need to develop other indicators for measuring collective non-market goods.

Economic value of BO_2

The last part of our analysis consists in attributing a monetary value to the impacts of the actions of the BO_2 program. It should be pointed out that the data support the idea that the BO_2 program contributed to preventing school dropout in three cases and to helping another youth integrate into the job market. We thus set out to measure the economic value of the BO_2 program by referring to the savings realized by the Quebec government in adult education and job market integration. More specifically, we posit that savings were realized by the public authorities given that the intervention of the BO_2 program allowed: (1)

potential drop-outs (cases A, B, and C) to persevere and obtain a high school diploma in the regular school system rather than in the adult education system; and (2) one drop-out (Case D) to overcome the negative effects of having dropped out of school by giving this individual the necessary tools to integrate into the job market.

The values used to quantify the savings achieved by avoiding school drop-out were based on the budget allocations made by Quebec's Ministère de l'Éducation, du Loisir et du Sport (MELS) to a school board to pursue the schooling of a drop-out who had reached majority.

The values used to quantify the savings achieved through employment assistance were based on the allowances paid to the participants of the "Programme alternative jeunesse," run by Quebec's Ministère de l'Emploi et de la Solidarité sociale (MESS). This program was deemed to be appropriate because it is specifically aimed at people under 25 years of age who wished to "acquire personal, social, and professional autonomy."

The values retained did not include the expenditures for infrastructures or other fixed expenses in the case of MELS measures, or for the functioning of the programs in the case of the MESS. Moreover, the amounts retained to educate a dropout did not include the sums required to educate students presenting special needs (e.g., disabled students). These amounts could constitute real savings; however, their incorporation into this analysis would have required introducing hypotheses that would have been difficult to support empirically.

The savings made according to the impacts observed were calculated as follows:

- concerning school dropout (i.e., leaving school before obtaining a high school or vocational diploma), the cost of educating a young adult is higher in the adult education system than in the regular system; that is, the system for young people. In 2007–2008, the additional cost incurred to educate a young adult was $3,408 per year.

  The additional cost of $3,408 corresponded to the difference between the "basic allocation for adult activities in general training" ($5,606) and the "allocation for the basic functioning for activities of young people" ($2,026) in effect for the 2007–2008 school year. The "basic allocation for adult activities in general training" comprised an allocation per student for "teaching resources" ($4,592), an amount for "pedagogical guidance" ($234), and a sum for "support resources" ($780). The "allocation for the basic functioning for activities of young people" comprised two basic amounts; that is, $1,571 for teaching and $455 for educational activities. These values were drawn from a document titled "Règles budgétaires pour l'année scolaire 2007–2008. Commissions scolaires" (Budget regulations for the 2007–2008 school year. School boards) published by the MELS (http://www.mels.gouv.qc.ca/dgfe/regles/reg_cs/index.html).

  In light of the above, the BO_2 program generated annual savings of $3,408 per year for each case in which dropout was avoided.

- in the case of employment assistance, it cost $7,398.36 per year ($616.53 per month for 12 months) to help a person aged 25 years or younger acquire autonomy.

  This cost corresponded to the annual sum of the monthly average allowance ($616.53 per month) given in 2007–2008 to a participant from the Outaouais region in the Programme alternative jeunesse (MESS website). It should be pointed out that the cumulative duration of adults' participation in MESS programs was 218.9 months in 2008 (MESS website).

  Thus, the BO_2 program generated annual savings of $7,398.26 for each person for whom recourse to the Programme alternative jeunesse was avoided.

CONCLUSION

Programs for young people provided by the CCLs are popular and numerous, and it is thus pertinent to evaluate the real or potential spin-offs of these programs and to estimate their preventive value for individuals, families, and society as a whole. There is a strong argument for developing tools that can translate this value into economic or financial data. The case of SAJO's BO_2 program constitutes a first experience in constructing an analytical model of spin-offs in terms of products that can be associated with an economic value. We can assume that it would be possible to apply this framework to all programs provided by CCLs in order to evaluate the benefits and savings of these programs. Across Quebec, each of the 83 community centres reaches between 1,000 and 5,000 people per week, of whom adolescents represent 14% (FQCCL, 2007).

Therefore, based on this exploratory study, we are convinced of the importance of pursuing research aimed at documenting the savings generated by recreation for young people, despite the absence of public programs aimed at each of the problem areas. However, the challenges involved are considerable. Social accounting is an arduous task given that its social impact does not involve real financial transactions (Quarter, Mook, & Richmond, 2003b).

Our contribution is that of having established an innovative correspondence between community recreation and a novel method, that devised by Marée (2005). On a practical level, this research introduces indicators that are pertinent and adapted to the reality of the population taking part in activities at community recreation centres. The framework developed presents impacts and products of community recreation which have been observed for a long time by recreation workers but which have yet to be acknowledged by the theories. The framework thus provides feedback to administrators and directors of community organizations who often receive no external feedback whatsoever, and offers the funding parties a basis for evaluating their investment in community organizations. Overall, we believe that the study offers critical elements for dialogue between board members and organization managers on the one hand, and the funding parties on the other. Such dialogue could lead to 1) perceiving community intervention in terms of value creation and savings of public funds as opposed to highlighting only the consumption of resources and 2) improving the distribution of financial resources in order to improve practices. As Wheaton (2003) pointed out, "changing the method changes what we see." Our method, albeit very exploratory, provides a fresh view of the impacts that community recreation can have on a community.

Despite the limitations discussed earlier, this study establishes an analytical framework that brings a new perspective to the impact of community programs. This framework appears to be both broad enough to evaluate the different impacts (savings and benefits) of the intervention on the community and precise enough to present significant results. Lastly, this study brings out the difficulties involved in measuring the economic and social performance of community organizations. However, it opens a way for future research projects based on representative samples, which will lay the foundations of a system of indicators that can be used to evaluate the activities of community organizations.

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NOTES

1. The term "school drop-out" refers to people who have momentarily or definitively left the school system without having obtained a high school diploma (MÉQ, 2000). The term "school leaver" refers to people who have *definitively* left the school system without having obtained a high school diploma (general or vocational). The dropout rate does not correspond to the school leaver rate because the interruption, in the case of the former, is not necessarily definitive (MÉQ, 2000 and 2003).

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Measuring Performance for Accountability of a Small Social Economy Organization: The Case of an Independent School

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ABSTRACT

This article is a result of a joint project in social economy research between a community partner—an independent school—and academic partners. The school is a democratic organization, run by teachers and parents. The goal of the project was to find ways to improve communication and reporting about general performance of the school as part of the school's accountability to its members. Starting from lessons of the balanced scorecard approach for non-profits, we describe the process of development of survey-based measures for the particular organization. The direction of the tool development and subsequent organizational changes were carried out in a participatory process between the school's staff, the parents, and the board. We identify the limitations and challenges of this process, and outline its successes to draw lessons for other similar democratic organizations.

RÉSUMÉ

Cet article est le produit d'un projet conjoint de recherche sur l'économie sociale entre un partenaire communautaire—une école privée—et des partenaires académiques. L'école est une organisation démocratique dirigée par des enseignants et des parents. Le but de ce projet était de trouver des façons d'améliorer la communication et la reddition de compte en ce qui a trait au rendement général de l'école comme faisant partie de la responsabilité de l'école envers ses membres. En commençant par des leçons sur l'approche de tableau de bord équilibré pour les organismes sans but lucratif, nous abordons le processus de l'élaboration de mesures fondées sur des enquêtes pour l'organisation particulière. L'orientation du développement d'outils et des changements organisationnels subséquents ont été déterminés lors d'un processus participatif entre le personnel de l'école, les parents et la direction. Nous

établissons les limites et les défis de cette façon de procéder et en soulignons les réussites pour tirer des leçons qui serviront à d'autres organisations démocratiques comparables.

Keywords / Mots clés
Non-profit democratic organization; Measuring performance; Balanced accountability in schools /Organisation démocratique sans but lucratif; Mesure du rendement; Responsabilité équilibrée dans les écoles

INTRODUCTION

Performance measurement in schools is often linked to discussions about how to improve student performance. It is associated with a desire to improve the effectiveness and efficiency of schools, although views on the nature of such improvements and the appropriate measures to be applied vary (Cullen,Joyce, Hassall, & Broadbent 2003; Huitt, 1999; Elementary Teachers' Federation of Ontario, 2001). There has also, perhaps, been an emphasis on a top-down approach, with measures often being defined by external regulatory bodies and centring on assessing student achievement, typically through formal testing. In addition, and linked to student performance, there has been some interest in assessing teachers' performance, at least partly on the basis of their students' achievements. One expression of this has been the re-emergence of performance-related pay for teachers in the U.S. and U.K. (Burgess, Croxson, Gregg & Propper 2001).

Originating in the context of a community and university research alliance (CURA),[1] our interest is in taking a wider perspective on school performance, considering the multistakeholder nature of the organization and seeking to explore the potential for developing performance measurement tools at the individual organization level, and with the participation of key stakeholders. Our goal is not to ignore the importance of student achievement, but rather to emphasize the different meanings of achievement to different stakeholders instead of relying on the standardized testing tools. In addition, we aim to balance these different definitions of achievement with other aspects of performance and explore the potential for a set of more rounded measures that more closely reflect the particular goals and identity of the organization and its members.

A Canadian elementary school[2] in our study has a particular teaching philosophy that emphasizes the balanced academic and social development of a child. According to the philosophy of our focal school, standardized testing can be viewed as counterproductive in that it produces an educational strategy aimed at obtaining particular test results, rather than developing children as problem-solving individuals within a wider society. Performance-related teacher pay also violates the culture and intentions of this organization, which is based on a strong sense of cooperation, teamwork, equity, and equality, so that teacher evaluation and student success must be viewed in a different context. The central question then becomes how to measure performance and communicate it clearly to the stakeholders while maintaining the organization's unorthodox approach to education and respecting its democratic character. On the one hand the issue is about accounting for student learning, and on the other it is about the internal processes, transparency, and accountability to members.

Stakeholder engagement is a critical component in this project, in light of the participatory action research methodology, and (arguably) even more so when striving to gain insights into the nature of accountability in non-profit organizations. There is an increasing consensus in the literature that accountability in non-profit organizations has to be defined in the broadest terms as being responsive to the expectations of a wide set of stakeholders, and that the traditional definitions—including financial performance, internal

controls, and regulatory compliance—are not sufficient to describe an organization's performance (Ospina, Diaz & O'Sullivan 2002; Barrett, 2001; Pruzan, 1998; O'Dwyer & Unerman, 2008).

The traditional standards used to ensure accountable behaviour in decision-makers in organizations do not provide adequate measures of a non-profit's adherence to mission, fulfillment of goals, or impact on community, so that responsiveness to stakeholders lies at the heart of definitions of broad, or "holistic," accountability (O'Dwyer & Unerman, 2008). Others also point out the importance of internal accountability, both in terms of performance standards and internal responses (Kearns, 1996; Ebrahim, 2003). The school in our study is owned and operated by its members. It does not receive any public funding, and it self-subscribes to following the provincial curriculum requirements as a benchmark. Broad accountability in this context includes internal accountability to members, but also a wider responsibility to external stakeholders, such as the community, including the school's graduates.

With these key issues in mind, the research team in the social economy project decided to examine the balanced scorecard (BSC) approach to measuring performance (Kaplan & Norton, 1992, 1996, 2001b, 2004, 2007) and how it could be applied in the setting described above. The appeal of the BSC is in its emphasis on balancing a range of financial and non-financial performance measures for organizations, and in its potential for actively engaging stakeholders during the important process of developing measures within a strategic planning framework.

The rest of the article is developed as follows. We take a closer look at the BSC literature in reference to evaluation of school performance, but also in reference to benefits for small non-profit organizations. The school and its mandate and educational philosophy are then described in more detail, setting the stage for the description of our progress with tool development, but stopping short of the development of a full scorecard based on select objective indicators. The survey results are analyzed in the balanced accountability framework (Jones, 2004), making a case for the use of survey-based indicators and potential development of other indicators in this context.

LITERATURE: THE BALANCED SCORECARD

The BSC approach (Kaplan & Norton, 1992, 1996; Niven, 2003) assumes that financial performance measures on their own provide a limited historical view of an organization's performance, and that financial information, while an essential element in planning and decision-making, needs to be balanced by other perspectives. Specifically, in addition to financial measures, the BSC adds measures in relation to: customers (how do customers see us?); internal processes (at what must we excel?); and learning and growth (how do we continue to improve?). The BSC also seeks to concentrate attention on a relatively small, manageable number of key measures, which can assist in focusing attention on key goals. One appeal of the process of developing, implementing, and using the BSC is that it provides opportunities for involving a wider range of people not previously involved in discussions of performance measures (Kaplan & Norton, 1992). This wider participation results in an important shift away from a controlling perspective, traditionally driven by the finance function, to one that embraces vision and strategic thinking. This is particularly true in small organizations where people at all levels can potentially be involved in the process (Andersen, Cobbold, & Lawrie, 2001), and therefore seems suitable for a democratic organization like the school in our study.

In the non-profit organizations context the user/client perspective may be placed at the top of the BSC, moving finance from its pre-eminent spot (Kaplan & Norton, 2001a). More important, non-profits can place their overarching mission objective at the top of their scorecard, since the mission represents their reason for existing and their point of accountability with society. The mission represents the long-term goal, while the four categories can then be used to represent short- and medium-term objectives. Such division into more manageable shorter-term goals appears to have merit for non-profits if one takes into account the findings by Sawhill and Williamson (2001) that reveal the difficulty of measuring mission impact for non-profits, but relative success when they measure mission-oriented goals.

Kaplan and Norton (2001b) note the value in communicating the BSC to all levels of the organization and point to the role of the BSC in clarifying strategic thinking. Numerous other case studies also indicate the differing levels of intensity of use and integration of the BSC within planning and decision-making processes, as well as the various ways of applying the approach to different functions within an organization. Some organizations, for example, have made extensive use of the BSC and performance measures and management to better understand the relatively complex workings and activities of the organization and improve decision-making at various levels (Pointer, Totten& Orlikoff 2005; Kaplan & Norton, 2001b; Meliones, 2000). Conversely, some smaller organizations may not go as far as implementing BSC measures or indicators, but may value the initial process of discussion and consultation, providing an opportunity to share information and reflect on the organization's activities and clarifying strategic goals (Lawrie et al., 2006; Manville, 2007; Sioncke, 2005; Halpern & Richman, 2002). Lawrie et al. (2006) suggest that there is a place for considering performance measures and performance management in small organizations but in a way that takes account of both limited resources and also the much closer involvement of decision-makers in the daily activities of the organization. This closeness to daily activity allows those involved in managing to see some aspects of performance first-hand and so reduces the need for the range of performance data required in larger organizations.

One challenge with the implementation of BSC mentioned in the literature is that it is time-consuming, because to be effective it needs to be modified to reflect a particular organization's goals and perspectives and produce measures that are relevant to that organization; and it needs strong long-term internal leadership, motivation, and support for its development and implementation. Poor design and poor implementation may lead to its failure. On a more positive note, the BSC is viewed as a potential vehicle for greater participation and empowerment of staff and members; can extend beyond strategic management and assist with organizational change; and can also evolve from a measurement to a management tool. The development process of the BSC may also have a positive impact on the strengthening of organizations' information and communication systems (Halpern & Richman, 2002). A word of caution, however, comes from Forbes (1998) who stresses that, generally speaking, performance measures are limited in nature and the approaches of devising measures for non-profits must allow for reflection, communication, and learning.

Some studies examine the use of the BSC in education. They apply to schools in the U.S. (Carr, 2005; Karath**a**nos & Karath**a**nos, 2005) and elsewhere (e.g., Malaysia, see Lee, 2006; Portugal, see Saraiva, Rosa, & d'Orey, 2003; and the U.K., see Storey, 2002), as well as to institutions of higher education (e.g., Cullen et al., 2003; O'Neil, Harold, & Bensimon, 1999). These and other studies applying the BSC model to measure the effectiveness of schools offer some relevant conclusions for our case. For example, there is recognition that development of the scorecard needs to involve staff in order to build commitment, and constant review and action are needed to assess strategy (Cullen et al., 2003). The importance of self-

evaluation is also indicated as a BSC advantage (Saraiva et al., 2003), stressing that teacher-designed evaluation tools may have more merit than measures imposed by the outsiders (Storey, 2002).

An interesting view is offered by O'Neil et al. (1999) who see the BSC as an opportunity to effect change from within and structure measures internally before they are externally imposed. In other words, they suggest that the BSC development has the potential to satisfy regulators' demands for measurable performance and accountability, while also encouraging internal engagement and consultation in the process. Another point they make is that the most effective use of BSC depends on agreement about the core processes and their assessment, and acceptance of credible mission-driven measures of performance.

The need to strike a balance between the various interests of stakeholders is also echoed in the literature, as is the need to be cautious in applying a model originally designed for use in a market economy setting. Dimmock and Walker (2004) underscore the importance of avoiding too narrow a focus on market measures (such as enrolment and finance) and support the need for a more holistic approach to strategy, including a coherent set of values. Strategic intent and leadership for school improvement should be value driven, learning focused, and long term, and should include cultural context.

Lastly, Jones (2004) stresses that student testing need not imply student learning, and believes that schools should be held accountable for the physical and emotional well-being of students, student learning, teacher learning, equity, access, and improvement. He also emphasizes that schools should be accountable to their "primary clients" (that is, students, parents, and the local community), with accountability achieved through multiple measures including qualitative and quantitative approaches, seeking to improve student learning and school practice, equity, and access; provide guidance and information for decision-making; and reflect a democratic approach. In Jones's view, the educational version of the BSC's four components would consist of: 1) student learning; 2) opportunity to learn; 3) responsiveness to students, parents, and community; and 4) organizational capacity for improvement, replacing the BSC business model components. We return to Jones's study later, using this framework to evaluate the performance of the school in our case. In light of these arguments, most of which apply to our case, we describe the process of development of some qualitative measures for the school, which evolved within the organization.

CASE STUDY: SCHOOL'S BACKGROUND

The school in our study is governed by a board of directors (consisting of parents and teachers) and managed daily by teachers and one administrative support person. The school has been in operation for more than 30 years as a joint effort of parents and teachers. It started small in a university setting as an experiment in holistic education methods. Originally the school included children from kindergarten to grade four. It grew in stages over the years, expanding to grade six when the school gained independence, to finally reach its current size that includes K–grade nine (children aged 4–15). In the few years prior to the beginning of this project, the school underwent expansion in the number of classes and age groups, with an overall increase in the number of students from approximately 80 to the present 170 in less than two years. A new building was built in a new location to house the expanded school. The new building whose size facilitated this latest growth spurt were prompted by the expiration of a lease in the rented space the school occupied over a number of years.

The teaching philosophy of the school, although rigorous and with high expectations, does not conform to the same criteria of either the public school system or other private schools in the region. It subscribes to a holistic approach to education (see Gamberg, Kwak, Hutchings, & Altheim, 1988): experiential learning, multi-age classrooms, and theme-teaching rather than teaching by subjects. It ascribes to the scientific methods in learning, so that children of all ages engage in brainstorming, organization, research, and delivery; and it does not use any formal testing as an evaluation method, save for grade eight and nine students who require this skill for entry into the public or private high school systems. At younger ages (up to grade six) report cards are also not produced, thus requiring extensive communication and trust between teachers and parents.

In terms of the organization, teachers and parents share responsibilities on a number of committees, which have a supporting role in the operations of the school. The school initially incorporated as a multistakeholder cooperative with two types of members and was managed by the teachers and parents through their engagement in committees, from maintenance and landscaping, to finance and curriculum. The board of directors included teachers and parents as well, and was chaired by a parent. This structure remains today, even though the school changed its legal status to a non-profit society to qualify for registered charity status.[3] The management and governance are, therefore, conducted by laypersons, even though teachers who have been with the school longest have accumulated knowledge about the organization and carry its vision. Strategic planning for the school has typically been haphazard, even though strategic planning sessions have been used, particularly when growth was on the agenda. However, fast growth has also meant that the fashion in which the school was run when it was small is no longer producing the same results now that the school has doubled in size.

Communication among stakeholders was negatively affected by the sharp increase in the school's size, thus the board of directors has engaged in discussions about performance evaluation and effective communication within the school. The school joined in on a social economy research project as a partner with academics who were also parents of children enrolled in the school, and together the partners have been examining these issues over the past few years.

METHODOLOGY: MEASURING PERFORMANCE

Tool development

Given the nature of the organization, the initial challenge was to achieve consensus about the purpose and scope of measuring performance, and to agree on the process and methods. The process was driven by a small group of parents and the Head Teacher, and supported by the board. It was recognized that a twofold approach would be best: the school would engage in data collection and decisions about appropriate indicators and both quantitative and qualitative measures would be produced in the form of survey instruments for the stakeholder groups. Stakeholders were identified to be teachers, parents, students, and the outside community, and it was decided to proceed with engagement of the two major stakeholder groups—teachers and parents—in the development of survey instruments. The process started with survey development for a couple of reasons. One is that it was less time-consuming and less contentious. Both stakeholder groups were required to participate in order to make the tools relevant, and that implied discussions about issues that were then addressed by direct questions, rather than indirect measures. Further, there was some initial apprehension among the teachers about the purpose and use of evaluation, and concerns about tools and their "ownership." A participative way forward through a dialogue was the only acceptable option. Also relevant was a lack of clear understanding (or lack of

discussions) about the possible indicators and measures to use and their relationships to outcomes. Given the school's cultural aversion to testing and use of indicators, the survey approach was seen as a better fit. An invitation for volunteers was issued to the parents and teachers at the school, and they then formed separate research groups. Both groups engaged in discussions about evaluation and reporting, and each developed a list of general issues of importance to them to become a part of the survey for their group. They also participated in the development of questions to address selected issues (available from the authors). Parents were involved in both the parent and alumni survey development (but not the staff survey) and feedback from teachers was invited on all aspects of the process.

In the staff survey, teachers included questions that addressed overall job satisfaction, parent-teacher interactions, professional development, communication and leadership, governance, and evaluation. It is interesting to note that teachers wanted to report on the consistency of teacher evaluations, as well as the effectiveness of the peer evaluation process that the school uses to achieve these aims. Also of interest was the issue of communication and stress on transparency in decision-making. The parent survey included questions about the overall school life of the children, curriculum, parent-teacher interactions, school environment, governance and administration, and special programs in the school. Parallel to this process, the school engaged in revamping the mission statement so that other efforts could be aligned with the mission, and to develop a common understanding of the school's mission and purpose so that the measures could be more effective.

The surveys were constructed using standard psychometric approaches in order to ensure adequate balance (positively and negatively phrased items) as well as appropriate response scales (e.g., Likert-type forced-choice scales) to allow for quantitative analysis, and open-ended comment-based responses to allow for qualitative analyses. This dual approach allowed respondents to provide information in the format they felt most comfortable with. Surveys, once developed, were discussed in three separate focus groups: one for parents, one for teachers, and one for graduates of the school. Based on input from the focus groups, changes were made to the surveys to ensure that all topics of interest were being covered.

RESULTS

Three surveys were constructed: one for the parents, one for the staff of the school, and one for the students who had graduated from grade nine.[4] The parent survey first asked parents to report the class level of the child for whom the respondent was answering the questions. For those families with more than one child in the school, parents were asked to respond to the child-specific questions once for each child. Overall, parents responded to questions distributed across nine sections of the survey: Overall Impression; Parent-Teacher Interactions; Curriculum Content; Classrooms and Outdoor Environment; Your Child and the School; Before-/After-School Programs; Other Programs and Activities; Open-ended Questions; Administration and Board of Directors. In the first year of the survey, 111 respondents started the survey, 19 of whom had a second child in the program and 1 of whom had a third child in the program. Thus, in total, 131 surveys for the child-specific portions were started and 111 surveys for the non-child-specific items were started. There was some attrition throughout the survey, reducing the total number of child-specific responses from 131 to 125. Overall, based on 148 students enrolled at the time of the survey, this translated to a response rate of 89%—an excellent response rate by any standard. This survey has been repeated for several years now, and with the exception of one year that had a 50% response rate, response rates have typically been above 80%.

The staff survey was very similar in structure to the parents' survey. Staff responded to questions distributed across eight sections: Overall Impression; Parent-Teacher Interactions; Job Aspects and Professional Development; Communication and Leadership; Administration and Board of Directors; Evaluation and Assessment; Clubs and Other Activities; Open-ended Questions. Sixteen of 19 staff members responded to the survey, representing an overall 84% response rate, also an excellent response rate. All surveys were completed online using a Web-based survey collection tool. Clearly, the computer access necessary to complete the survey was not an issue, given the high response rate. It should be noted that the respondents also had a higher than average socio-economic status. Most, if not all, of the parents and staff have home computers and Internet access, and we could therefore carry out Web-based data collection. The data were coded and analyzed using standard statistical and qualitative analytic procedures by an independent research assistant. In the parent survey the responses were overwhelmingly positive, with a number of suggestions for improvements provided. Responses in the staff survey were similarly positive, although concerns were raised in a number of areas, particularly staff evaluations and hours worked. These results were critical in raising confidence in the survey methodology at the school, so the surveys continued to be conducted annually and are now in their fourth year (see Smith & Novkovic, 2011).

An important part of our approach was stakeholder engagement and communication, thus a series of opportunities to meet with the respondent groups was organized. Stakeholder groups had been involved in the questionnaire development stage, and were also engaged in the presentation of results. First, the data were presented to the board, and then to the staff, and at the annual general meeting to all members. In addition to the oral presentations and discussion periods, two complete written reports were also made available.

DISCUSSION

As stated in the introduction, Jones (2004) argues that the health of (public) schools depends on a balanced accountability model and that the four components of the balanced school accountability model are 1) student learning; 2) opportunity to learn; 3) responsiveness to students, parents, and community; and 4) organizational capacity for improvement. The author lays out arguments in favour of this approach, and possible indicators for each of the four performance areas. We believe that those arguments carry over to the school described in our study, even though it is a private school, because of its philosophy and the values it is based on. Therefore, we take a closer look at how the school in our study fares under this model, and how our assessment addresses each of these issues, based on the results of the surveys and focus groups. We also discuss possible indicators that can be extracted from the surveys, and some that need to be developed to measure the school's performance.

Student learning

Tracking student learning and progress is not a trivial task. Jones (2004), among many others, outlines the importance of reliance on a variety of assessment methods to evaluate learning, rather than depending on standardized tests alone. Arguments against standardized testing as the learning assessment tool abound (see www.fairtest.org for example), and in the case of the school in our study, testing is not applied at all in grades pre-K to eight. The school uses a theme-based teaching approach, with ongoing evaluation of student progress (outlined in Gamberg et al., 1988). Theme-based learning in this context provides a specific topic (e.g., oceans or discovery) and all the subjects in the school are

included within this underlying theme. This links the subjects together and allows them to be taught in a fluid and connected (rather than esoteric and unconnected) fashion. Teachers report on students' progress through ongoing communication with parents facilitated through small class sizes. As indicated in our survey, this occurs through frequent before- and after-school communications, as well as four parent-teacher meetings per year. This approach seems to be received well by parents, especially for younger students. Indeed, the majority of parents felt they understood where their children should be and how well they were doing, even with no testing or report cards (with the exception of the upper-middle schoolchildren who need report cards to progress to high school in the public system).

An important issue with the lack of a formal evaluation approach is the need to invest in professional development for teacher assessment training to achieve high "assessment literacy" (Jones, 2004). Another issue is that parent-teacher communication must be very effective in order to build trust and provide the "missing information"; that is, the benchmarks parents usually construct through test results. This is one area where small cooperative-based schools may have some difficulty. It was clear in the staff survey that, being outside of the public system, opportunities for professional development were somewhat limited. In addition, because of the school's unconventional approach, relevant learning opportunities were rare.

Therefore, a two-tiered approach seems important. First, the school needs to be clear on the *use* of evaluation methods other than (or complementary to) standardized testing. Our school does well on that score alone. Specifying those methods is an important element of communication with the stakeholders. The second part of the equation must be *evaluating* the effectiveness of those alternative methods. Indicators may be used to track the professional development, effective communication, and other measures of increased likelihood of learning. Another important element is parent perceptions of learning. Parents in our survey generally felt that their children were learning, but had some concerns about specific subjects (e.g., history, geography). This is in part due to the lack of communication about how topics get covered in the theme-based approach when there is no official time allocated to the subject. The shift needs to be from evaluation-based performance to outcome-based performance. How do the children apply their knowledge?

Thus it was important in the survey that parent and staff opinions about learning were obtained. Select survey questions developed by the school's stakeholders can be used as indicators of specific goals or outcomes. Based on this approach, one could use answers to the questions related to teacher professional development, and teacher evaluation and assessment, but also parents' view of the learning and progress of their children overall, and in specific areas. Nonetheless, these are simple perceptions. One must also be aware that perceptions and reality may not always mesh. Thus it may be important to obtain and assess objective outcomes (reading level, math preparedness, and language skills) relative to same-age peers in other schools.

Opportunity to learn

In the public school context, Jones (2004) argues that schools must provide equitable learning opportunities to all students. We are looking at a private school, and as such it is not open to all. Efforts are made to provide scholarships, but as in any private school, those are not sufficient to render the school "open to all." The school is guided by the interests of the insiders, and actions are typically taken to benefit the long-term goals of the organization, rather than address the individual needs of the broader

community of learners. Alternative interpretations of the opportunity to learn may include access to knowledge; professional teaching conditions; learning environment; and fair, humane, and equitable treatment of students. Generally speaking, schools need to devote time to develop measures of opportunities to learn within the school, as well as to evaluate teachers on some of these measures.

Results of the parent and staff surveys speak to the above issues for our target school. Access to knowledge by the teachers was reflected in staff responses to the professional development section. They felt that professional development, if relevant and available, was not always accessible due to time and budget constraints. With a high teacher to student ratio, little money was left over for substitute teachers to allow for professional development. In addition, teachers reported working an average of 49.5 hours per week, thus little time was left for additional development. Teachers also noted that part of professional development was teacher evaluations, and although they found the peer evaluations useful, when deficiencies were found, they did not have much time to work on the issues identified. Furthermore, lack of time limited the frequency of evaluations, further impeding the opportunity to learn and develop.

Nonetheless, parents highlighted the fair and ethical treatment received by the students, and lauded the fact that the small classes allowed for greater teacher-student contact. Both parents and staff discussed the importance of communication in the learning process, but both groups also felt that parent-teacher communication was sufficient, although parent-administration and teacher-administration communication could be substantially enhanced. Again, this deficiency was perceived to be due in large part to the multiple roles the administrators held (e.g., full-time teacher as well as division head or head teacher).

An additional measure of students' opportunity to learn may be the availability of additional learning resources. A resource teacher is typically made available to assist with specific student needs, for example, but with limited resources this service may not be available at all times and to all students.

Some relevant measures can be quantified (resource teacher availability; teachers' hours per week; number of days per teacher in professional development; number of scholarships, for example), while others may be extracted from the survey (percentage of parents or teachers who rate a particular item highly, for example). If a descriptive reporting format is chosen, it ought to be consistent over time to track progress.

Responsiveness to students, parents, and community

The process of development of performance measures we have described in this study is a reflection of responsiveness of the school in question to its stakeholders, and from that perspective the school is doing very well. Moreover, in our case the stakeholders include teachers who are typically viewed (as in the case of Jones, 2004) as the executors of other stakeholders' demands, rather than equal partners in the delivery of education programs. It is worth noting that because a private school is free of the demands of local geographical divisions, most teachers with children have had their own children educated at the school as well. Thus, most teachers are or have been parents of students themselves. Generally speaking, the overall high investment by teachers is evidenced by a strong teacher presence in the management and school governance, which results from its history as a multistakeholder cooperative. This aspect makes the school portrayed in this study unique. The process of development of stakeholder surveys and other evaluation methods, as well as the use of those tools, has the potential to further increase the responsiveness of the organization to its stakeholders. Improvements can be made to

include community interests in a wider range of activities, but also to report on all the aspects of the school's responsiveness to the stakeholders' needs.

It has been said that the simple act of measuring something causes it to change. This appears to be the case with this school. When the project started, the board of directors was eager to see the fruits of the study, as they believed that they had a strong school, albeit with some areas that required improvement. As the results of the surveys were disseminated, clear areas for development were identified. Communication with parents, particularly around school policies and grade-appropriate benchmarks, was identified as an area where improvements could be made, and in the time since the results were made known the school has made strides to address these and other issues. The survey results also identified strengths, and boosted confidence in the school's education methods and philosophy.

For endogenous changes to continue, it is paramount that all stakeholders have a sense of ownership of the process and tools of performance evaluation. Stakeholder engagement is therefore essential in identifying issues, developing measures, finding solutions, and developing strategic planning. This school continues to demonstrate achievement in those areas. A potential challenge is that stakeholder participation could be unbalanced, with parents being under-represented relative to their numbers. Effective communication with parents is therefore essential for success.

Organizational capacity

The fourth aspect of a balanced school accountability model is the organizational capacity to provide high levels of performance. The school in our study already delivers on the aspect of teacher empowerment, considered by Jones (2004) to be an integral part of capacity building. All teachers are deemed equal, all share responsibilities, and all have a say in the school governance, teaching, curriculum, and other aspects of school life. In a typical public school the curriculum is predetermined. At our target school, all the teachers, including those new to the school, meet for two weeks in the summer to work out the curriculum for the year. This makes for a substantial additional workload, but this level of control is mentioned by the teachers as an important benefit.

A downside of the control exerted by the teachers may be that this level of engagement includes a high degree of responsibility and workload. Thus, many of the teachers indicate that they (and their families) feel they are overworked and burned out by the end of each school year. Based on the survey, these perceptions can be quantified and reported. Additional indicators may also be developed as needed, such as numbers of teachers involved in particular decisions, teacher turnover, etc.

In addition, the teachers are paid significantly less than public school teachers with similar levels of experience,[5] and, as mentioned above, they may have less time to prepare for teaching, document student progress, and engage in professional development compared to teachers in public schools. Indeed, the exceptionally high average hours worked per week is already more than 10 hours per week above that of an average teacher in the public system. Collective decision-making and support, however, may take away some of the stress and improve performance.

It is well established in the organizational stress literature (Carayon, 1995; see Kelloway & Day, 2005, for a review) that increased job control is predictive of reduced stress and negative stress outcomes. Therefore, in order to ensure the continued improvement and development of the school and staff, these issues need to be closely tracked and reported on in order to give them the attention they deserve. Also

important is tracking of volunteer hours by all stakeholders, for both communication[6] purposes and awareness of value added and commitments to the school. On that note, measures of perceived openness (democratic decision-making) of the school to input from all stakeholders are also vital (for example, are all teachers exerting equal decision-making powers; are students engaged in decisions that concern them; are parents equal partners in decision-making; do the community partners influence decisions in any way, etc.).

Lessons and challenges ahead

As discussed in this study, the balanced scorecard approach outlines the importance of stakeholder engagement and strategic thinking in an organization (Kaplan & Norton, 2007). Performance measurement of non-profit organizations is typically linked to the fulfillment of their mission, rather than financial goals (e.g., see Sawhill & Williamson, 2001, while balanced mission-supporting goals would form the content for reporting, vision, and strategic thinking. The mission of the school in our study, besides student academic performance, includes promotion and preservation of an educational approach, namely theme learning in multi-age groupings, with an emphasis on cooperation rather than competition. The school should therefore focus on measures that indicate success in those areas. We discussed a balanced approach above, and addressed some issues relying on survey results. Other types of measures and indicators need to be developed, however, and used regularly to report progress.[7] Ideally, the school would focus on consistency in the delivery methods (teacher training and ability to apply teaching through themes), and collecting supporting evidence that the method does what it claims to do. Some possibilities include comparative studies of children of different ages. Following children after they leave the school and documenting their progress would also be a valuable tool to document success of the educational approach taken in this school. Alumni surveys will do some of that, but a coordinated effort to engage all stakeholders is needed to devise appropriate measures and indicators.

It has been recognized (see Andersen et al., 2001) that small organizations may lack the resources to fully implement the BSC measures and indicators. However, they may value the initial process of discussion and consultation, providing an opportunity to share information and reflect on the organization's activities and clarifying strategic goals (Lawrie et al., 2006). The school in our study has undergone this consultative process, and moved toward stakeholder surveys to measure progress and implement change. We find that the school has also benefited from the process, even though advances have occurred in stages, with various participants and varying degrees of success. In the process of stakeholder engagement around survey development and reporting the school has developed additional communication channels, responded to stakeholder suggestions, engaged in strategic planning, and improved communications. It is also clear that a broader focus on financial issues, as typically included in the BSC, would benefit the school.

Much remains to be accomplished, particularly regarding institutionalizing communication channels and stakeholder engagement. The ad hoc approach that worked reasonably well in a smaller school in the past is no longer enough. A move in a positive direction was the establishment of an Evaluation Committee of the board. This committee is charged with developing and reporting on the results of the current and future stakeholder surveys. However, the mandate of the Evaluation Committee needs to be revisited regularly to ensure currency and focus. This committee may provide the institutional support and memory needed to continue development of the balanced indicators and measures, assist with survey results and recommendations, and provide leadership in evaluating performance.

We believe that a consistent set of measures needs to be developed to assist in the school's management and facilitate succession planning, both based on the survey data, and additional quantitative indicators of interest to stakeholders. Developing a BSC is viewed in the literature as a potential vehicle for greater participation and empowerment of staff and members; it is said to extend beyond strategic management and assist with organizational change, and it can also evolve from a measurement to a management tool. The development of these measures should involve all stakeholder groups, as stakeholder engagement and an inclusive process have been this school's hallmark.[8]

Another aspect of the process of developing self-evaluation tools and methods using internally accepted, credible, mission-driven measures of performance is their potential for external impact. O'Neil et al. (1999) see the BSC as an opportunity to effect change from within and structure measures internally before they are externally imposed. In our context, the school may consider external accreditation at some point in the future. Therefore, developing its own measures that accurately reflect its mission and goals may serve a double role. Clarity about the need for the particular multistakeholder governance structure it developed would also be beneficial in the case of such an effort.

CONCLUSION

We have discussed the process of developing performance measures for a school that is a small, multistakeholder, democratic organization. Devising such measures in such an organization is a challenging and lengthy process that depends on the particular skill set of the volunteers engaged at different times. In addition to the lack of resources (including time), small democratic organizations face other challenges, such as leadership and vision to carry forward performance assessment tasks. Typically, decisions are ad hoc, with limited strategy, making it all the more difficult to undergo the process of organizational change. For the school in our study the need for organizational change resulted for the most part from its fast growth. Parents and teachers involved wanted to preserve the organizational culture, while the school doubled in size.

In this article we described the process of developing stakeholder surveys, to be used for reporting about progress and accountability and responsiveness of the school to stakeholders' concerns over time. The dialogue between various stakeholders, in the spirit of devising balanced measures of performance, has been described in the article with the goal of refining the mission of the organization, and communicating about the mission, the vision, and the interim goals that support it.

The balanced scorecard literature related to non-profit and small organizations, and to educational institutions in particular, addresses some relevant issues for our purposes. We adopted the balanced accountability framework (Jones, 2004) to illustrate some possibilities for consistent evaluation and reporting within that structure. School accountability to its stakeholders, we argue (in line with Jones), calls for: reporting about student *and teacher* learning and opportunities to learn; addressing working and learning environment; responsiveness to stakeholder concerns; and ensuring organizational capacity for high levels of performance. An additional dimension must be stakeholder involvement, measured by both objective measures and subjective views of an organization's openness to receive input from all stakeholders.

For the school in our study, the key to meaningful evaluation and reporting of performance is turning to strategy and institutionalizing the main values that create its unique culture. The balanced approach is a natural fit, given this organization's mission, culture, and values. A prolonged focus on the "bottom line"

may negatively impact the values espoused by its members. The organization has made great strides toward this goal, but more needs to be done. In particular, concerted efforts are necessary to create a balanced report with the purpose of increasing transparency with more open communication and ensuring long-term member loyalty.

The organization we described in this article has been facing all the challenges of a small democratic organization engaged in devising its performance measures. However, all democratically governed non-profit organizations could benefit from this process in the long run, since stakeholder engagement and ownership of particular processes, based on shared responsibilities, are important. Also important for the future shape of any organization is the process of building the institutional framework to support its mission.

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NOTES

[1] CURA in the Social Economy, funded by the Social Sciences and Humanities Research Council 2005-2010.
[2] The school is independently owned and operated by the parents and teachers.
[3] This change was based on legal advice at the time. It was later established that the school could incorporate as a non-profit cooperative and keep its charitable status. As all structures of a cooperative remain, from member shares to the governance structure and participatory management, the school's stakeholders decided to avoid the costly process of changing the legal status again. They remain a society, governed on cooperative principles.
[4] The full questionnaire is available from the corresponding author on request. An Alumni Survey was also developed, but due to small sample sizes because of limited numbers of junior high school graduates to date, the results of this survey are not discussed in this article.
[5] Approximately 80% of the public teacher salary at the time of the project. The board's goal of achieving 90% of public school salaries has recently been achieved.
[6] Teachers often express that parents' commitment to the school is insufficient, while parents may be unaware of the long hours teachers spend at the school. Tracking volunteer hours could possibly explain some of these trends.
[7] This could become a part of the Head teacher's report, for example.
[8] The school has recently examined the terms of reference of its committees. Historically, all committees have been open to all members, but more recently some were defined as Committees of the Board for functional reasons. This may require re-examination by parents and teachers, as this openness in management and governance may in fact provide the needed sense of transparency and inclusion.

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The Role of Community Organizations in the Transformation of the Social Development Model in Québec[1]

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ABSTRACT

Community organizations have played a major role in the delivery of social services in Québec since the 1970s. Their activities aimed to provide an alternative to the heteronomous, bureaucratic practices of the public sector. But their desire to move away from the public sector did not prevent them from demanding financial support from the state. Historically, these associations' struggles have led to the establishment of an original partnership and a funding mode whereby they could retain their organizations' autonomy. This autonomy was the guarantee of both their specificity and their ability to innovate in terms of social practices. While this state recognition certainly remains in some respects ambivalent, it is nonetheless undeniable that these associations today constitute a significant component of the Québec model of social development.

RÉSUMÉ

Les organismes communautaires jouent un rôle important dans la prestation de services sociaux au Québec depuis les années 1970. Leurs activités se sont développées dans l'optique d'apporter une alternative aux pratiques hétéronomes et bureaucratiques du secteur public. Cette volonté de se distancier du secteur public ne les a toutefois pas empêchés de revendiquer le soutien financier de l'État. Historiquement, les luttes menées par ces associations se sont donc traduites par la mise en place d'un partenariat original et l'établissement d'une mode de financement qui leur permet de préserver l'autonomie de leur organisation. Cette autonomie est le gage de leur spécificité et de leur capacité d'innover sur le plan des pratiques sociales. Certes, cette reconnaissance étatique demeure à certains égards ambiguë. Néanmoins, il est indéniable que ces associations constituent aujourd'hui un élément important du modèle québécois du développement social.

Keywords / Mots clés

Community organizations; state; social development model; innovation; funding / Organismes communautaires; État; Modèle de développement social; Innovation; Financement

INTRODUCTION

The action of community organizations has proven pivotal in the past three decades in the evolution of the social development model in Québec. Seen at the outset as providers of residual services operating on the fringe of the system, community organizations gradually gained legitimacy during the 1980s and 1990s in the context of frequently innovative social practices that offered solutions to the shortcomings of the bureaucratic state. It is estimated that in 2009–2010 the sums invested in community organizations by the Québec government provided full-time work for the equivalent of more than 30,000 people in Québec, and ensured the participation of many thousands of volunteers. Moreover, that same year, the Québec government paid almost $844 million to more than 5,000 comunity organizations (SACAIS, 2010). This is clear evidence of the community sector's activities being recognized, despite the ambiguities and socio-political tensions that accompanied this financial support.

Our aim in this article is to analyze the role that community organizations played in the evolution of Québec's social development model. To do so, we first look back at some of the main innovations put forward by the community sector in the health and social services system in Québec. Second, we will show that community groups' influence is, however, neither the sole nor even the most telling influence to have had an impact on the system's transformation. A number of management principles, with their origins in the market sector, significantly affected the general alignment of services.

The influence of community groups has grown since the early 2000s, and this has affected the institutional framework benchmarking community organizations' participation in the delivery of health and social services. This will lead us, thirdly, to demonstrate that although the principles associated with new public management (NPM) reflected the government's growing concern with the efficiency and effectiveness of the system, their rigid, authoritarian application prompted a re-evaluation of the institutional compromises that led historically to the deployment, within the system, of the social innovations generated by community practices. The government thereby weakened one of the fundamental elements of the Québec model of social development. First, though, we will present some of the theory and methodology behind the benchmarks that guided the work for this article.

THEORY AND METHODOLOGY

To take into account the community sector's decisive impact on the evolution of Québec's social development model, we use a theoretical framework that allowed us to analyze the complex interactions operating within the processes of crafting the institutional and organizational forms that structure society (Touraine, 1973). Our analyses were therefore based on three converging theoretical approaches—social movement theory, regulation theory, and convention theory—whereby social stakeholders (e.g., community organizations, labour unions, public servants) have the capacity to transform social relationships, particularly in their dealings with the government or among groups in society. These three theoretical approaches are complementary since they each address a specific dimension of the topic of our study.

However, the theoretical approaches are arranged in such a way that each of their contributions refers to a given level of analysis so that they are not in contradiction with or disconnected from the topic of our study. We use social movement theory to explain social conflicts and social stakeholders' relationships with the processes of production and reproduction of societal institutions (social relationship dimensions) (Neveu, 2002); we use regulation theory for the institutionalized compromises produced by these stakeholders to resolve their conflicts and structure the resulting development models (institutional dimension) (Boyer & Saillard, 2002); and we use convention theory to identify the forms of criticism and "justification" at work in the coordination of systems and organizations delivering services (organizational dimension) (Boltanski & Chiapello, 1999).

While social movement theory and regulation theory are relatively well known to researchers as a whole, convention theory—and in particular its variant as formulated by Boltanski, Thévenot, and Chiapello as an "economy of worth" (*économie des grandeurs*)—is perhaps less familiar. To the best of our knowledge, these authors' work has never been fully translated for an English-speaking readership (Boltanski & Thévenot, 1991; Boltanski & Chiapello, 1999).[2] That is why we feel it is helpful here to provide some clarification on a number of the concepts developed by these authors.

The "justifications" talked about by Boltanski, Thévenot, and Chiapello are defined on the basis of the principles of action implemented by social stakeholders in a specific situation. They talk, for instance, of the appropriateness of a habit justified by the principle of tradition (domestic worth); the inspiration that led to an original creation or an innovation (inspired worth); the validity of a technical process or the reliability of technological equipment justified by an industrial measurement and evaluation process (industrial worth); and the legitimacy of a decision based on the expression of a collective will through democratic processes (civic worth) (Boltanski & Thévenot, 1991). These justifications thus refer to a number of "higher principles" that become more prominent at times of conflict or dispute, when these principles and the mechanisms on which the operation and co-ordination of the systems or organizations at issue are based are seen to be challenged. The work of clarifying and ranking the principles begins among the stakeholders concerned, through a process aimed at re-establishing human justice and fairness or the fitness and justness of processes and objects, depending on the situations involved.

We recognize that these statements are rather brief for anyone wishing to grasp the full scope of some of the concepts put forward in this paper. Readers wishing to examine these questions in greater depth are therefore invited to consult the original work that gave rise to the theoretical discussions concerning these approaches (Jetté, 2005a). These remarks also apply to methodological issues. The project from which this article stems involved 40 interviews with key informers from the community sector (heads of province-wide coalitions, leaders of social movements, etc.) and the public sector (provincial and regional officials), as well as the analysis of hundreds of documents generated by stakeholders from the public sector and third sector (Jetté, 2005a).

Before we begin our analysis, some clarification concerning the concept of social innovation is warranted to distinguish it from the concepts of social movement and social change. Social innovation may be seen as a process aimed at "the establishment of new social arrangements, new forms of mobilization of resources and new responses to problems to which the known solutions are inadequate" (Klein, Fontan, Harrisson, & Lévesque, 2009, p. 3 [unofficial translation]). But social innovation must not be confused with social movement. While social movement is often an "incubator of social innovation," its scope is much broader and deeper, involving collective action aimed at social change at a societal level. In other words, social innovation can lead to social change if it is proposed by social stakeholders who are in a

position to disseminate it to a large number of organizations and to establish a power relationship sufficient to overcome the barriers put up by social stakeholders who are opposed to it. The social stakeholders propelling the change thereby force the establishment of new compromises that bring a new meaning to social relationships and crystallize the social change (Klein et al., 2009, pp. 4–5).

Community organizations cannot be reduced to a mere subsector of the private sector with non-profit characteristics. Rather, we place them within a third sector alongside the public and private (market) sectors. Like other researchers (Defourny & Monzon Campos, 1992; Spear, Leonetti, & Thomas, 1994; Bélanger, 1999; Vaillancourt, 2006), we include non-profit organizations, cooperatives, mutual aid societies, and social economy enterprises in the third sector. Despite the variability in empirical practices observed in the field in Québec[3] and in Canada in general (Hall et al., 2004), these organizations and enterprises both comprise a grouping of individuals (rather than shareholders) with specific, formal rules that have been democratically adopted, thus enabling them to make tradeoffs between their objectives of economic and social viability (Jetté, Lévesque, Mager, & Vaillancourt, 2000). They also share the goal of social utility and common interests that excludes seeking profit on the basis of capital-based share ownership (Favreau, 2005). In this respect, community organizations in Québec are "an essential component of this third sector" (Bélanger, 1999), and clearly contribute to the shape of Québec's social development model.

A SOCIAL DEVELOPMENT MODEL FUELLED BY SOCIAL INNOVATIONS ORIGINATING WITH COMMUNITY GROUPS

Our research has shown that, over the past 30 years, community organizations have constituted a formidable source of social innovation for the ministère de la Santé et des Services sociaux du Québec (MSSS) in terms of practices (organizational dimension) and the nuts and bolts of their relations and interactions with government (institutional dimension) (Jetté, 2005a, 2008). The process of institutionalization whereby the community clinics of the early 1970s were converted into local community service centres called *centres locaux de services communautaires* (CLSCs)—public establishments combining primary social and health services in one location—proved to be the trigger for a long line of generalization and transfer of practices. Initially tested in the community sector, these included practices concerning abused women, mental health, and young people. Nevertheless, in the context of the period, the institutional conditions for transferring and maintaining these innovations in community clinics (that is, the CLSCs) showed clear limitations. This mode of institutionalization was in fact heavily dependent on the Fordist and welfare state model of development in effect at the time, and on the main institutions that structured the system, including a centralized bureaucracy, a Taylorist division of labour, and standardized programming of services (Jetté, 2005b).

The institutionalization of grassroots groups within the CLSCs was characterized by hierarchical integration and state control, which acted as a structural brake on maintaining the innovations present at the outset in those organizations. The forms of coordination required by the practices of community groups (e.g., militancy, participation, and experimentation) were not very compatible with those of the public sector (e.g., control, rationalization, and standardization). The initial compromise that the reformers of the health and social services system attempted to impose at the time between social and medical practices and the requirements of standardization stemming from the technocratic organization of public services, and the autonomy of associations' practices, could not be maintained over time. This was

attributable in particular to the low level of political and symbolic recognition enjoyed by community organizations compared with that of the medical world and the public sector, including the labour unions. But this partial failure—partial because the CLSCs were nevertheless a success on other fronts—would not put an end to the dynamics of recognition, transfer, and generalization of community practices.

Community-centred change

In this regard, the practices developed by women's groups with respect to violence would in turn become standard practice and be partially transferred to the public sector in the mid-1980s. But this time the organizational innovation would lead to experimentation at the institutional level; that is, innovation would occur in the actual process of transferring innovation. Thus, women's groups saw their practices receive province-wide recognition within the framework of the policy on abused women adopted in 1985 (MAS, 1985), but without any state control of their organization, as had happened with community clinics during the previous decade (Bélanger, Lévesque, & Plamondon, 1987). Rather than these resources being integrated into the public sector, their autonomy was preserved at the same time that they were awarded funding which, although certainly still contingent on the ministry's available budgets, nonetheless proved sufficient to ensure their development in subsequent years. This phenomenon was to be repeated later, under specific terms and conditions, within other components of the community sector, notably certain organizations working with young people (youth homes) and alternative mental health organizations (RMJQ, 1996; MSSS, 1989).

As to the actual process of disseminating innovation, its characteristics were largely crystallized around the community organization support program (SOC), a program set up in 1973 to fund community organizations on the basis of their general mission, and permitting minimal reporting geared to the organizations' operating methods (MSSS, 2008). Once the partial failure of the process of institutionalizing community clinics was accepted by the Québec government in the 1980s, they resorted to other forms of arrangements to maintain and perpetuate the innovations initially present in community organizations.

Contrary to the strategy of state control used in the early 1970s, and under pressure from social movements, Québec's social affairs ministry, the ministère des Affaires sociales (MAS), gradually became aware of the specific nature of community organizations, the close relations they maintained with local communities, and the specific mindsets that characterized them (militancy, participation, reciprocity, and experimentation). This change in perspective with respect to community organizations was also fuelled by certain stakeholders within Québec's civil service, particularly the Council on Social Affairs and the Family (Conseil des affaires sociales et de la famille, CASF). The CASF had a mandate to advise and inform the ministry on the best strategies to be adopted with regard to health and social services. During the second half of the 1970s this advisory council published two position papers strongly emphasizing the need to preserve these principles of participation and reciprocity if the government wished to maintain an environment conducive to the emergence of innovation and experimentation within the community sector (CASF, 1976, 1978). The result was that, from the 1980s, when the future of the welfare state was being questioned, the Québec government was more open to the development and funding of a community or third sector, comprising non-profit organizations, to assist it in its health and social services mission.

Community sector recognition and transformation

The increased recognition of community organizations prompted certain elements in the Ministry of Health and Social Services to propose new institutional arrangements that would help protect the community sector from being excessively subjected to the priorities and constraints of the public sector, so as to preserve their capacity for social innovation. This realization partly originated in budgetary constraints and the economic downturn following the first signs of exhaustion of the welfare state model in the late 1970s. But it also arose from awareness work carried out by public servants within the ministry itself, primarily those working in the community organization support service, the Service de soutien aux organismes communautaires (SSOC), the administrative unit in charge of managing the SOC program. For these officials, who had the opportunity of expressing their views at the Rochon Commission hearings in 1986,[4] the community sector represented more than mere cut-rate subcontractors providing services not delivered by the public sector; it constituted new service deliverers with their own specific features that made it possible to integrate principles of action (i.e., reciprocity, participation, and experimentation) that had largely been eliminated from the health and social services system by the bureaucratic, technocratic organization of the public sector. In other words, the contribution of community organizations allowed the MSSS not only to inject new resources at low cost into the system, but above all to make a qualitative leap forward in the delivery of services to the public (SSOC, 1986).

This evolution in the relationships between the public sector and the third sector would pass a significant milestone and, finally, lead to a new compromise in 1990 upon the application of a major health and social services reform: the Côté reform[5] (Jetté, Lévesque, & Vaillancourt, 2001). This entailed regionalization and some democratization in the organization of health and social services, particularly the creation of regional boards (*régies régionales*) and the introduction of elected positions on the boards of directors. These new establishments had a mission to plan, organize, and deliver health and social services within their geographical areas. The community sector's contribution to the health and social service system would then be the subject of a large-scale process of institutionalization, within the framework of certain sections of the new law structuring this reform. This was accomplished through the establishment of specific terms and conditions for funding stemming from the SOC program. These arrangements then converged to model a new approach to the contribution of community organizations within the health and social services system: regionalization of budgets, maintenance of the organizations' autonomy despite the provision of public funding, funding for their overall mission, minimum accountability, and participation in regional decision-making bodies (MSSS, 1990). This new model reflected the principles of what Boltanski and Chiapello call the *critique artiste*, a form of criticism using principles of autonomy and innovation to remodel institutions and organizations (Boltanski & Chiapello, 1999).

From the 1990s there thus began a transformation of the social development model in Québec. The model of the centralized welfare state delivery of services retreated, making room for an approach that was more plural, in terms both of service deliverers and of mindsets at work within the health and social services system. At the theoretical level, these new approaches were given various names, depending on the orientation and goals targeted by these transformations: "partner state" (*État accompagnateur*), "entrepreneur state," "facilitator state," "Schumpeterian state," "social investment state," and "strategist state" (*État stratège*) (Saint-Martin, 2007; Côté, Lévesque, & Morneau, 2009; Noël, 1996; Jessop, 1993; Barreau, 1990). More recently, the more generic concept of the "social state" appeared (or reappeared). This goes beyond the concept of welfare state in that it encompasses a new configuration for taking charge of social issues (Merrien, Parchet, & Kernen, 2005). Generally speaking, these approaches

highlight the fact that the welfare state model was outdated and outflanked by pluralistic public policy, where one sector alone—public, private, or third sector—could not dominate the delivery of public services (Abrahamson, 1999; Boyer, 2006; Donzelot, 2007).

INFLUENCE OF NEW PUBLIC MANAGEMENT ON THE ORGANIZATION OF HEALTH AND SOCIAL SERVICES

The Québec state did not evolve in a vacuum. It was also shaped by market forces during the 1980s and 1990s, even if those influences were not felt as intensely as in some other Canadian provinces or the United States (at least, until the early 2000s) (Vaillancourt & Tremblay, 2002). Some of the political players—first among them Robert Bourassa's Liberal Party, in power from 1985 to 1994—flirted with the idea of a more marked application of the market, neoliberal orientation to the health and social services system. This neoliberalism manifested itself in the privatization of certain establishments, and the imposition of co-insurance (*ticket modérateur*) and income tax on services (*impôt-service*).

The Liberal government set up a task force, the Groupe de travail sur la révision des fonctions et des organisations gouvernementales, in 1985, and its report on the role of government advocated abolishing a whole series of advisory bodies, privatization of certain hospitals, dismantling of certain regional authorities, complete decentralization of the management of establishments, and widespread use of subcontracting as a service delivery mode (Gobeil, 1986). Bourassa's government finally retreated in the face of the uproar provoked by some of the proposals in this report, and by some of the more controversial sections of the draft legislation piloted by Marc-Yvan Côté (MSSS, 1990). Political pressure (both from the public and from social movements), and the penalties associated with potential violations of the Canada Health Act, finally won out over the neoliberal inclinations of the provincial government. The privatization movement was thus curtailed in very specific areas, such as housing for the elderly, home services, and auxiliary services in hospitals (Vaillancourt & Jetté, 1997).

Reform by stealth

The penetration of the market mindset in Québec took place more subtly and less spectacularly than privatization or imposition of direct user fees would have done. Instead, the values and principles of the market sector were introduced through forms of management and the question of system effectiveness. In this regard, the early 2000s were a turning point, primarily following the publication and implementation of certain recommendations of the report produced by the Clair Commission (Commission d'étude sur les services de santé et les services sociaux) (Clair, 2000). The Québec government was forced to alter its strategy and policy to counter constantly rising health care costs. Public health and social services establishments then became the target of management principles inspired by the private sector, namely New Public Management (NPM). This growing influence of management sciences on the management of services would thus toll the death knell for the experiment with the regionalization and democratization of the health and social services system that had begun in 1991.

It was therefore largely in an attempt to regain control over the hospitals' financial situation that governments, both Parti Québécois and Liberal, put an end to the experiment with regionalization and democratization of the system in the late 1990s. Notwithstanding the advantages brought by this regionalization, such as resources for primary care services delivered by the CLSCs and community organizations, the hospitals' inability to stay within budget led successive governments to realign the system to take back control of health care spending.

The imposition of more authoritarian, hierarchical governance reflects the predominant influence of health care circles over social services within the health and social services system. It also reflects a dual orientation within the system, and a real paradox in government action since the late 1990s. In 2001, the government introduced a Policy on the Recognition and Support of Community Action inspired by the SOC program (SACA, 2001). This policy benchmarked the overall relationships of Québec government ministries with the community sector, favouring funding for the latter aimed at supporting their general mission. In 2004, the MSSS published a framework and a government action plan on community action which, while limiting the growth of financial resources granted to community organizations, also renewed the government's recognition and autonomy of community organizations (MSSS, 2004a, 2004b).

At the same time the government initiated another reform (the Couillard Reform)[6] imbued with ambiguities as to the future relationship between community organizations and health and social services centres (CSSSs). CSSSs were new local bodies born out of the merger of CLSCs, hospitals, and long-term residential care centres within a geographical area. The CSSSs' mission was to coordinate that area's overall health and social services, whether public, private, or community-based. This reform was directly descended from the principles of New Public Management (NPM). In NPM managerial practices from the market sector are promoted, together with the attainment of results by building on the accountability of the stakeholders involved in the delivery of services, and the implementation of performance incentives (Amar & Berthier, 2007).

In health and social services, the application of the principles of NPM translated into a reinforcement of political authority to the detriment of the power of regional administrations and community organizations over the orientation of services (Larivière, 2005). The conversion of regional boards into health and social services agencies in 2001 and the reform of their boards of directors on the basis of co-opting directors with management expertise was the first stage toward a "measurable" approach to the system's results and performances (MSSS, 2004c). This NPM orientation effectively negated the power that community organizations had worked to develop regionally since 1991.

Devolution to community

The creation of the health and social services centres (CSSS) in 2003 constituted the second stage in these changes, which displaced the system's centre of gravity from the regional to the local level. But this displacement appears to correspond more to a devolution operation than to a true process of decentralization. Under this new structure, major policy positions and the determination of budget priorities fell to the central authority (the ministry), while the administrative stakeholders (CSSSs) were used to achieve budget tradeoffs at the local level. The MSSS favoured service agreements between these new CSSSs and service deliverers from the third sector (community organizations and social economy enterprises) as well as the private sector (particularly private residential facilities for the elderly). These new agreements were viewed by the ministry as a way to ensure the integration of services while keeping them within a defined financial framework. But this type of arrangement violated the basic principles of the relationships that had developed historically between the MSSS and the community sector, in particular through the Community Social Support program. Service agreements in this context were defined more as subcontracting operations supervised by a government unilaterally determining the conditions of the supply of services (Bourque, 2005).

Implications for community organizations

New issues arose for community organizations, such as having to defend funding for the overall mission awarded through the Community Social Support program, while applying the industrial principles of efficiency and effectiveness. The history of the development of the community sector shows that the organizations' autonomy is above all based on their ability to carry out the majority of their activities outside the financial constraints associated with attaining performance goals. Performance goals and evaluation tools are not compatible with achieving their mission. The achievement of their mission and the specificity of their practices lie in their ability to mobilize principles of action that are harder to objectivize. These principles play a crucial role in the delivery of services to individuals, namely citizen participation, reciprocity and giving, innovation and experimentation, creation of social linkages, and proximity to users. Paradoxically, maintaining these principles of action proved to be the condition, as noted above, for the optimization of their performance with respect to communities' health and welfare.

Seen in the light of industrial instrumentality, community organizations operate under a significant amount of uncertainty: uncertainty as to the cost of services (e.g., funding for the overall mission including a broad spectrum of action over which the directors have little control); uncertainty as to the time required for the action (difficulty measuring the time needed for mobilization and empowerment of communities); and uncertainty concerning the determination of the short-, medium-, and long-term effects of the action (e.g., effects that are often preventive, lending themselves less immediately to standard evaluation processes) (Le Bossé & Dufort, 2001, pp. 96–104). Uncertainty too because community groups operate in the field of social services, where the grip of the accounting mechanisms of NPM are weaker.[7] And finally, uncertainty in terms of epistemology, as their action can sometimes run counter to the know-how and measures advocated by managerial experts. Such expertise in managerial know-how, substantially mobilized by NPM, also legitimizes the increased use of actions built on the evidence-based model. This evidence-based model postulates that by implementing practices that have been verified empirically (evidence-based measurement), these practices will become effective and will lead to better cost control (Lecomte, 2003). Managerial practices and epidemiological practices are thus combined here, through a common philosophy of instrumental rationality, to reinforce the mindset of industrial production in the health and social services field.

NEW COMPROMISES TO BE FORGED

Community organizations nevertheless enjoy certain advantages in this situation, which at first glance may seem unfavourable. Their increased presence gives them a political clout that they lacked during the 1970s and 1980s, but more than that, the compromise that these organizations managed to establish between certain traditional demands of the Left (such as social justice, economic security, and equality among citizens) and principles originating in the cultural revolution of the 1970s (individual and community autonomy, innovation in intervention practices, and healthier lifestyle and environmental practices) constituted an innovative alternative to both the traditional welfare state and neoliberalism. Community organizations' action led to the introduction of a true welfare pluralism not limited to the private and public sectors, but built on modes of exchange and delivery of services emerging from the dynamics of reciprocity (Evers & Laville, 2004).

Furthermore, in the context of uncertainty generated by the adoption of new management modes, the existence of negotiated agreements, recognized through certain legislation and social policy, becomes a considerable asset, enabling community organizations to preserve their gains and continue to exert some

influence on the health and social services system. In this regard, funding of the overall mission received by community organizations in the health and social services field in Québec through the SOC program, and subsequently broadened to all community groups in 2001 through the policy of the secretariat for autonomous community action, the (SACA) (SACA, 2001), is a fine example of an agreement that successfully reconciles the the community sector's principles of participation, innovation, and reciprocity with the principles of accountability, effectiveness, measurement, and budget control applied by the government. This is despite the fact that recent research shows that the SACA's policy has been implemented very unevenly by different ministries and there is a long way to go before Québec's entire community sector enjoys full recognition and adequate funding (White, 2008).

The recognition acquired by community organizations in Québec thus stems not only from the efforts made to find solutions to the welfare state crisis, but also from the unceasing struggle of the community sector, which has forced the government to negotiate a new type of compromise between policies that until then had often proven irreconcilable. The development of this type of arrangement is crucial, because it could well constitute, in certain conditions, an alternative to the privatization of public services. Wedged between the defenders of the traditional welfare state model and the supporters of the market orientation, the community sector has every interest in gaining recognition for the specificity of its relations with the government in areas of public interest. The non-profit character of the organizations delivering services will always remain a strong signal of confidence for vulnerable individuals and communities in need.

CONCLUSION

Community organizations, as a component of the third sector in the health and social services field, have contributed in a decisive manner to shaping the social development model in Québec. Their impact has been felt in particular through their ability to innovate and engage in political action. These dual actions have been part of the burgeoning of new forms of practice and new social policies, and the establishment of new relations with the government. Community organizations have set themselves up as "co-constructors" of new public policy and promoters of an alternative development model, whose principles have marked the evolution of the welfare state since the 1980s.

This co-construction of new mechanisms, and the recognition of the community sector, occurred because of the establishment of formal and informal alliances with stakeholders operating within the public sector. These supports within the government itself led to institutionalized compromises that benchmarked the terms of community organizations' participation in the delivery of health and social services.

This commitment from public sector stakeholders toward the community sector has varied, depending on the period and the identity of those in certain key positions within government and the public service. But the growing establishment, particularly since the late 1990s, of managerial mechanisms borrowed from the market sector clearly illustrates the limits of this support. This circumstantial solidarity between the community sector and certain public sector stakeholders never really led to the reversal of the major neoliberal trends at work within the system. As a result, the fragile balance of the compromises forged over the past 30 years is sometimes jeopardized.

The government's obsession with budget controls and instrumental measurement tends to reduce the formal spaces for participation and dialogue (and thus the political space) necessary for the consistent

expression of principles of action advocated by community organizations. Thus, policy decisions are made as if the government had embarked on a new form of managerial rationalization solely to resolve the problems generated by a certain bureaucratic streamlining of services and certain rigidities in the system. This increases the presence of instrumental measures within the system, and moves issues toward the attainment of goals determined within technocratic bodies. In this context the establishment of a consensus around this new issue should, according to the artisans of these new reforms, remove the obstructions behind the system's dysfunction. But the establishment of a new organizational framework for action focusing on the integration of resources on its own cannot resolve an issue, some elements of which are of a political nature, particularly when this framework has been in place since the early 2000s.

It is the desire to achieve a common good that needs to motivate the effective adaptation to the demand for services, not the maximization of the performance of human, physical, and financial resources. The tangible achievement of the common good and general interest requires a political process that remains demanding even with outcomes that remain uncertain. Such a process would lead to a new balance of power between populations and service deliverers, and among service deliverers themselves, along the lines of what had been initiated in the early 1990s with the regionalization of services. In light of our research findings, it is our view that only by submitting to these democratic requirements will it be possible to move the system forward toward genuine welfare pluralism, and circumvent obstructions induced by the corporatist pressures and an instrumental vision of the development of health and social services.

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NOTES

1. This paper evolved from a doctoral thesis in sociology successfully defended in 2005 at the Université du Québec à Montréal (Jetté, 2005a). Subsequent research was funded by the Fonds québécois de la recherche sur la société et la culture (FQRSC).

2. Boltanski and Thévenot's book published in 1991 appeared in English translation in 2006 (Boltanski & Thévenot, 2006).

3. To find out more about this topic, the reader may consult the long list of monographs on third sector enterprises produced by the Laboratoire de recherche sur les pratiques et les politiques sociales (LAREPPS) and the Centre de recherche sur les innovations sociales (CRISES): www.larepps.uqam.ca and www.crises.uqam.ca.

4. The goal of this commission of inquiry into health and social services, chaired by Jean Rochon, was to evaluate the operation and funding of the health care system and make recommendations to the Quebec government. Jean Rochon was Quebec's minister of Health and Social Services from 1994 to 1998.

5. Named after the minister who piloted this reform, Marc-Yvan Côté. Many of the terms and conditions of this reform were inspired by the recommendations of the Rochon Commission report (Rochon, 1988).

6. Once again, named after the incumbent minister when the reform was implemented, Philippe Couillard.

7. As the managers of the health and social services centres (CSSSs) would be assessed on the basis of results achieved, one might think it would be in their interest to build on what is measurable and countable. In that regard, the application of instrumental measurements lends itself more easily to the health than the social dimension of services: number of operations, cost of operations, planning of mobilized resources, for example.

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Voluntary Participation in Community Economic Development in Canada: An Empirical Analysis

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ABSTRACT

This article is an empirical analysis of an individual's decision to participate in community economic development (CED) initiatives in Canada. The objective of the analysis is to better understand how individuals make decisions to volunteer time toward CED initiatives and to determine whether the determinants of participation in CED are unique when compared to those of participation in volunteer activities in general. The dataset employed is Statistics Canada's 2004 Canada Survey of Giving, Volunteering and Participating (CSGVP). To date, there has been no prior econometric analysis of the decision to participate in community economic development initiatives in Canada. Results suggest a role for both public policymakers and practitioners in influencing participation in CED.

RÉSUMÉ

Cet article constitue une analyse empirique du processus de prise de décision chez les individus en ce qui a trait à la participation aux initiatives canadiennes de développement économique communautaire (DÉC). Le but de l'analyse est de mieux comprendre la façon dont les individus prennent la décision de consacrer du temps au bénévolat dans les initiatives de DÉC. Elle sert aussi à trancher la question de savoir si les facteurs de participation aux initiatives de développement économique communautaire sont uniques ou communs à la participation à des activités bénévoles en général. Les données employées dans le cadre de cette analyse sont puisées de l'Enquête canadienne sur le don, le bénévolat et la participation effectuée par Statistique Canada en 2004. À ce jour, aucune analyse économétrique n'a été menée sur la décision de participer aux initiatives canadiennes de DÉC. Les résultats suggèrent que les responsables de l'élaboration des politiques ainsi que les praticiens influencent tous deux la participation aux initiatives de DÉC.

Keywords / Mots clés

Community economic development; Volunteer; Rational choice theory; Collective action; Nonprofit sector / Développement économique communautaire; Théorie du choix rationnel; Bénévole; Action collective; Secteur sans but lucratif

INTRODUCTION

Voluntary participation in community economic development (CED) leads to positive benefits for the community and society at large through the provision of needed goods and services, such as social housing, worker training, and immigrant services. The current research endeavours to increase the understanding of how individuals make decisions to volunteer time for CED initiatives and to determine whether the determinants of participation in CED are unique when compared to volunteering in general. While the existing body of CED literature includes qualitative research on the determinants of participation in CED in Canada (Conn, 2006; Shragge, 2003), there appears to be a lack of quantitative research in this area, which the current research attempts to address.

This research is an analysis of an individual's decision to participate, or not, in a CED initiative using a traditional economic rational choice model. The rational choice model incorporates insights from the voluntary labour supply literature and socio-economic characteristics, and builds on the work of Torgler, Garcia-Valiñas, Macintyre and Ziemek (Torgler, Garcia-Valiñas, & Macintyre, 2008; Ziemek, 2006). While the broader social sciences provide a body of literature on volunteer motives (such as Clary, Snyder, & Stukas, 1996), this research focuses on an economics perspective of volunteer motives. Four questions are addressed. First, what are the determinants of an individual's decision to voluntarily participate in a CED initiative in Canada? Second, are the determinants of voluntarily participating in CED unique when compared to those of volunteering in general? Third, what are the determinants of the amount of time allocated toward voluntary participation in a CED initiative in Canada? And fourth, are the determinants of time allocated toward voluntary participation in CED different from those of volunteering in general?

For the purpose of this analysis participation in CED is defined as voluntary participation in development and housing organizations including organizations for community and neighbourhood, economic development, social development, housing associations, housing assistance, job training programs, vocation counselling and guidance, vocational rehabilitation, and sheltered workshops (International Classification of Nonprofit Organizations).

Community economic development (CED) has grown into a significant sector of Canada's social economy with close to 1,200 CED organizations currently engaged in various activities such as enterprise development, human capital development, and community capacity building, to name a few (Toye & Chaland, 2006). The federal and provincial levels of government in Canada have come to recognize the importance of CED and provide varying levels of support. For instance, Western Economic Diversification, a federal government department developed to improve regional economic development, cites CED as one of its major activities (Western Economic Diversification, 2010). Many of the provincial governments also demonstrate support for CED and apply CED principles to their programs and policy.[1]

Given the growing recognition of the value of CED in Canadian society, this research is expected to be useful for both public policymakers and CED practitioners. From a public policy perspective, voluntary participation in CED organizations may be viewed as a benefit to society by creating output that would otherwise require paid resources. CED organizations play an essential role by producing needed goods and services not provided by the private sector due to various market failures.[2] Generally speaking, voluntary participation in CED organizations leads to positive benefits for society, which public policymakers ought to encourage. CED practitioners may find the results useful for developing strategies to increase volunteer participation in CED.

This research contributes to the literature on CED, volunteering, and the non-profit sector. For instance, much of the volunteer literature is based on the assumption that the determinants of volunteer behaviour are homogeneous across the various charitable and non-profit sectors (Ziemek, 2006; Freeman, 1997; Van Dijk & Boin, 1993). Those with higher household incomes are expected to have a higher probability of participating in volunteer activities than those with lower household incomes (Statistics Canada, 2006). As CED initiatives are often targeted toward low-income communities, household income levels may not be an important determinant of voluntary participation in CED. This research is designed to investigate these generalizations.

This article is organized as follows. First, are a description of CED and an outline of the role of participation in CED. Then the relevant economic theory is reviewed. Then the empirical model for testing is described. Followed by an explanation of the data, a discussion of econometric issues and techniques, and a description of the variables. Followed by an explanation of the empirical results. Then a discussion of policy implications and conclusions.

LITERATURE

What Is Community Economic Development?

Community economic development, also known in the literature as community-based development, is a "participatory, bottom-up approach to development" (Markey, Pierce, Vodden, & Roseland, 2005, p. 2) with an emphasis on local self-sufficiency, local decision-making, and local ownership (Loxley, 1986). CED is viewed as a response to the failure of market-based approaches to development that had left numerous communities on the underdeveloped fringe of the economy over recent decades (Loxley, 2007; Shragge & Toye, 2006). According to Shragge and Toye (2006), many of these communities which had been dependent on large-scale industrial and primary production suffered large numbers of job losses as a result of structural changes in the Canadian economy. Various federal and provincial government programs developed to support regional economic development failed to produce sustainable employment and growth, leaving many smaller and rural communities in a state of high unemployment and poverty (Shragge & Toye, 2006). Since the advancement of CED across Canada in the 1980s, communities have surpassed governments in the development of community-based economic developments, eventually garnering government support for these CED program initiatives (Shragge & Toye, 2006). CED in Canada has developed into a dynamic, enterprising, and growing group of organizations engaged in a wide variety of activities aimed at strengthening their communities (Toye & Chaland, 2006).

The Role of Participation in Community Economic Development

Given that CED is a community-centred approach to development, the mobilization of community residents is essential for initiatives to be successful. The role of participation, often voluntary, is vital to ensure that initiatives respond to the needs and capacities of the community as expressed by the community itself (Fontan, Hamel, Morin, & Shragge, 2006; Markey, Pierce, Vodden, & Roseland, 2005; Mendell & Evoy, 1993). The 2002 survey of CED organizations in Canada reveals that CED organizations play an important role in mobilizing citizen engagement and volunteer contributions in communities (Toye & Chaland, 2006).

Attaining sufficient levels of participation is often challenging, particularly in marginalized communities frequently characterized as suffering from transience and a lack of community cohesiveness and commitment (Shragge, 2003). In many cases where a lack of social cohesion fails to generate a commitment to a common goal, community organizers, either from within or outside the community, play a role in

mobilizing people to act for their own interest in an organized way through community collective action (Shragge, 2003; Mendell & Evoy, 1993). There are numerous cases where community organizers have drawn communities together for participation in collective action toward community initiatives (Fontan, Hamel, Morin, & Shragge, 2006; Hanley & Serge, 2006; MacIntyre & Lotz, 2006; Shragge, 2003). Such collective action is typically targeted for participation in a specific development project, such as social housing or job training programs.

The aforementioned community organizers are frequently employed by community development organizations (CDOs). One role of CDOs is to initiate processes to bring community members together to support local development and to change defeatist attitudes, so pervasive after years of numerous development initiatives with varying levels of success (Fontan, Hamel, Morin, & Shragge, 2006).

Qualitative community development research has uncovered some determinants of participation in CED initiatives in Canada. It has been observed that there is a positive relationship between an individual's willingness to participate and her or his expected benefits from participation (Shragge, 2003). The expected benefits may be for the betterment of the broader community, which might include social justice, provision of a municipal service, and building local institutions to provide economic opportunity. Personal individual benefits may include skills and leadership development, and the opportunity to meet and spend time with other people (Shragge, 2003; Hibbert, Piacentini, & Al Dajani, 2003). Shragge (2003) observed a negative relationship between an individual's willingness to participate and the associated personal costs, which include time commitments—such as paid work and childcare—and energy levels. Observed obstacles to participation include a lack of confidence to being able to contribute to a project on the part of the potential participant, the defeatist attitude among community residents based on the belief that nothing will ever be accomplished, and lack of interest on the part of those who hope to move out of the community (Shragge, 2003; Hibbert, Piacentini, & Al Dajani, 2003).

The CED literature suggests that several socio-economic factors are also likely to affect participation in CED initiatives. Gender has been identified as a significant socio-economic factor as women appear to dominate participation in the CED sector (Conn, 2006; Shragge, 2003). Shragge suggests that a high female participation rate may be grounded in the view that a neighbourhood is an extension of the home, and thus neighbourhood issues are more likely to attract women than men (Shragge, 2003). CED initiatives are typically developed for marginalized neighbourhoods and communities (e.g., characterized by economic poverty and associated social ills). Given this portrait, it is expected that those most likely to participate in CED would be in lower-income households, have lower levels of education, and be less likely to be employed (Shragge & Toye, 2006; Loxley, 2007). Immigration status may also be a factor. The large number of CED organizations focusing on marginalized immigrant communities suggests that immigrant status may be associated with higher levels of participation (Toye & Chaland, 2006). These qualitative observations are considered in the empirical model.

THEORY

Contributions of Economic Theory

A number of economic theories address the motivation and incidence of volunteering. These include rational choice theory, voluntary labour supply theory, human capital theory, and public goods theory.

According to rational choice theory, a rational individual will make the decision to participate in CED if the net

benefits are positive and will continue to volunteer time until the marginal net benefits equal zero. Some economic models define the benefits and costs of participating solely in terms of economic gain, while others adhere to a broader definition of gains using the concept of utility to describe the satisfaction one derives from her or his activities. For instance, a benefit may be the feeling of personal satisfaction from participating in a community project, whether it succeeds or not. Thus benefits often consist of private and public benefits while the costs are opportunity costs typically measured in terms of time. Opportunity costs, for example, include time that could have been spent caring for children, participating in leisure activities, or working for pay. The rational behavioural approach has been used extensively to address related research questions on participation in the community and civil society (Akinboye, Ayanwuyi, Kuponiyi, & Oyetoro, 2007; Beard, 2007; Pattie, Seyd, & Whiteley, 2003; Bryant & White, 1982).

The economics of voluntary labour supply literature explores, identifies, and categorizes the motives behind volunteering (Ziemek, 2006; Freeman, 1997; Van Dijk & Boin, 1993; Andreoni, 1990; Menchik & Weisbord, 1987). Following Ziemek (2006), the private benefits of volunteering are classified as consumption and investment benefits and the public benefit is classified as the altruism benefit. This private consumption model is grounded in the notion that volunteers are motivated by the satisfaction derived from the "warm glow" feeling of doing something good, the achievement of a desired degree of social status, satisfaction at having carried out the work, or the fulfillment of social or ethical norms (Ziemek, 2006). The concept of a consumption benefit is supported by Cappellari and Turati's (2004) findings that individuals achieve a level of satisfaction from the act of volunteering itself. In addition, the consumption benefit is also influenced by negative incentives, as was found by Andreoni (1990), who reported that social pressure, guilt, sympathy, and avoidance of disapproval of others were additional determinants of volunteering.

The investment model is based on human capital theory and the assumption that volunteers are motivated to gain exchangeable benefits such as increasing job opportunities through the acquisition of skills, experience, and contacts (Ziemek, 2006; Van Dijk & Boin, 1993). Volunteerism has been described as a latent requirement for certain occupations, providing a signal to potential employers that a volunteer is a "good" candidate (Ziemek, 2006). For the investment benefit to occur, volunteering itself does not need to provide satisfaction as volunteering is seen as a means to accrue a future benefit, such as higher future income (Cappellari & Turati, 2004; Menchik & Weisbord, 1987). The public goods model assumes that volunteers are motivated to increase the supply of the public good, and thereby obtain an altruistic benefit. In this case the volunteer is motivated by a sense of moral obligation prescribed by her or his own set of values. It is acknowledged that the common economic view of pure altruism is that it either does not exist at all or at best is very rare (Andreoni, 1990).

Rational choice theory and voluntary labour supply theory set the stage for the development of a model of voluntary participation in CED.

EMPIRICAL MODEL

Modelling Participation in Community Economic Development

Rational choice theory provides the structural framework for the proposed model of participation in CED while voluntary labour supply theory provides a method to articulate the private and public benefits of voluntary participation. The costs of participation are evaluated in terms of opportunity costs, as illustrated in Table 1. As stated above, participants may volunteer simply for the purpose of increasing the supply of a public or quasi-public good, subsequently receiving an altruistic benefit (A). The public goods resulting from CED

initiatives may include improved public health, improved physical environment, neighbourhood stability, improved relationships among communities and businesses, and community empowerment through local decision-making (Lamb, 2007). Private benefits are categorized as either consumption (C) or investment benefits (I). Consumption benefits associated with participating in CED initiatives may include the fulfillment of social norms, achievement of social status, satisfaction from the work involved in voluntary participation, or the warm feeling from having done a good deed. Investment benefits associated with participating in CED initiatives include improved opportunities for employment, job training, making new contacts, and in some cases better housing and improved health (Lamb, 2007; Pattie, Seyd, & Whiteley, 2003). The costs of participation are the opportunity costs (T) of devoting time to participate in a CED initiative, such as the time devoted to paid work and caring for children.

Table 1: Model of participation in community economic development

Benefits:	*Costs (opportunity)*: (T)
Private benefits • Consumption benefits (C) • Investment benefits (I) Public benefits • Altruistic benefits (A)	• Paid employment • Childcare
Participation Decision: • If total benefits > costs → participate • If total benefits < costs → do not participate	

Voluntary labour supply theory predicts that individuals are motivated by either one or a combination of the three benefits (Menshik & Weisbord, 1987). The economic theory of rational choice contends that the likelihood of participating increases with the number and strength of benefits and decreases with the quantity and strength of costs. The strength of each benefit and cost is measured by the size of the marginal effect on the decision to participate, as is described in the results subsection of the data analysis section. In addition, a set of socio-economic factors are included in the proposed models. Descriptive statistics on volunteering in Canada suggest participation may vary according to age, education, income, the presence of children, immigrant status, and religious activity (Statistics Canada, 2006). Statistics Canada (2006) reports that the likelihood of volunteering falls with age and immigration status, and increases with high household income, education, paid employment, the presence of children, and religious activity. In comparison, CED literature suggests the likelihood of volunteering for CED may decrease with high household income, education, and paid employment, and increase with immigrant status (Shragge & Toye, 2006; Loxley, 2007). As previously mentioned, the CED literature suggests that gender is a determinant of participation in CED initiatives, with females being more likely to participate. The number of years spent living in the community is included as it may be a measure of social capital. It is expected that the likelihood of volunteering will increase at higher levels of social capital.

Four models are designed to address the following four questions: What are the determinants of an individual's decision to voluntarily participate in a CED initiative in Canada? Are the determinants of voluntarily participating in CED unique when compared to those of volunteering in general? What are the determinants of the amount of time allocated toward voluntary participation in a CED initiative in Canada?

Are the determinants of time allocated toward voluntary participation in CED different from those of volunteering in general?

Model 1: Determinants of an individual's decision to voluntarily participate in a CED initiative are summarized by the following function:

$$P_{ced} = F (A, C, I, T, S)$$

where P_{ced} represents an individual's decision to voluntarily participate in a community economic development initiative, A represents altruism benefits, C represents consumption benefits, I represents investment benefits, T represents the time costs of participation, and S represents the set of socio-economic factors.

Model 2: An individual's decision to volunteer in general is summarized by the following function:

$$P = F (A, C, I, T, S)$$

where P represents an individual's decision to volunteer for any type of organization.

Model 3: An individual's decision about how many hours to volunteer for CED organizations is summarized by the following function:

$$H_{ced} = F (A, C, I, T, S)$$

where the dependent variable is the number of hours (H_{ced}) devoted to volunteering for CED.

Model 4: An individual's decision about how many hours to volunteer for any organization is summarized by the following function:

$$H = F (A, C, I, T, S)$$

where the dependent variable is the number of hours (H).

The following hypotheses are tested:

Hypothesis 1: In accordance with economic theory, an individual's decision to voluntarily participate in a CED initiative is positively affected by private and public benefits and negatively affected by the costs of participating, as measured by opportunity costs.

Hypothesis 2: In accordance with economic theory, the amount of additional time an individual is likely to devote to a CED initiative is positively affected by private and public benefits and negatively affected by the costs of participating, as measured by opportunity costs.

Hypothesis 3: Females are more likely to participate in a CED initiative than males, as suggested by the CED literature.

Hypothesis 4: The set of determinants of voluntary participation in CED are different from the determinants of volunteering in general.

Hypothesis 5: The set of determinants of additional time devoted to voluntary participation in CED are different from the determinants of additional time devoted to volunteering in general.

DATA ANALYSIS

Empirical Analysis of Participation in Community Economic Development

Empirical analysis of the four models yields the results needed to test the five hypotheses. This section includes an explanation of the data, a discussion of econometric issues and techniques, and descriptions of the variables.

Data

The data is from the 2004 Canada Survey of Giving, Volunteering and Participating (CSGVP), published by Statistics Canada. It was selected over the more recent 2007 CSGVP because it contains a superior set of variables for this analysis. The objective of the survey is to collect data on unpaid volunteer activities, charitable giving, and participation. The target population for the 10 provinces is all persons 15 years of age or over, excluding full-time residents of institutions. Approximately 20,832 respondents were interviewed between September and December 2004 in the 10 provinces. After the variables for the four models were identified, observations with missing data were excluded from the analysis, leaving a sample of 18,297 observations.

Econometric issues

Two econometric issues affect the interpretation of the empirical results. First, the estimation for all four models may involve the econometric issue of endogeneity. Each model comprises a dependent variable and several independent variables. The endogeneity problem could affect the use of two independent variables, hours worked and charitable donations. The number of hours worked might be affected by the decision to participate in CED or in general volunteering. For instance, an individual may decide to work fewer hours because of her or his involvement in volunteer activities. As well, the number of hours worked may be affected by the number of hours devoted to CED in addition to general volunteering. In other words, the number of hours worked and the decision to volunteer may be determined simultaneously. The instrument variable technique is a statistical methodology used to overcome the endogeneity problem by adding instrument variables to the empirical estimation process. Instrument variables are chosen to be correlated with the endogenous variable but not to the dependent variable. Employment status is added to the estimation as an instrument variable for hours worked in all four models. Likewise, the decision to make a charitable donation may be affected by participation in CED and/or by volunteering in general in Models 1 and 2. For example, an individual may become more aware of the importance and need for charitable donations when participating in volunteer activities. Contributing to a church collection and making a donation to a health organization are both used as instrument variables for the decision to make a charitable donation.

Second, selectivity bias arises in the analysis of Model 1 because the decision to participate by non-participants in CED organizations is not observed. For example, preferences for volunteering in CED are on average expected to be higher in a sample of those who volunteer their time in at least one CED organization. Likewise, the econometric issue of selectivity bias arises in the analysis of Models 3 and 4 because the number of hours volunteered by non-participants in both CED organizations and volunteer organizations in general are not observed, and because the participants are self-selected, they do not comprise a random sample.[4] For example, preferences for volunteering more hours to CED organizations are on average presumably higher in a sample of those who volunteer their time in at least one CED organization. Heckman's sample selection model is used to mitigate selectivity bias in Models 1, 3, and 4. The maximum likelihood approach,[5] in which

observations are weighted to correct for different sampling probabilities, is used.

Variables

Dependent variables

Model 1: Participation in CED is constructed as a dichotomous variable with a value of unity if the survey respondent indicates participation in at least one CED organization, and zero otherwise. A total of 1,301 survey respondents have participated in community economic development initiatives as defined by voluntary participation in at least one organization for development and housing, based on the International Classification of Nonprofit Organizations (ICNPO).

Model 2: Participation in volunteering in general is constructed as a dichotomous variable with a value of unity if the sample member indicates participation in at least one volunteer organization, based on the International Classification of Nonprofit Organizations (ICNPO).[6] A total of 11,791 survey respondents have participated in volunteer activities.

Model 3: The number of additional hours devoted to voluntary participation in CED is constructed as a continuous variable with a value ranging from 1 to 2,016 hours if the sample member indicates participation in at least one volunteer organization for development and housing. The natural log of the number of hours is used in the model.

Model 4: The number of additional hours devoted to volunteering in general is constructed as a continuous variable with a value ranging from 1 to 8,750 hours if the sample member indicates participation in at least one volunteer organization. The natural log of the number of hours is used in the model.

Independent variables

The independent variables consist of proxy variables for the private benefits of investment and consumption, the public benefit of altruism, the time costs of volunteering, and socio-economic variables.

Investment benefit

The investment benefit is measured with three proxy variables; the first is student status (1=yes; 0=no), as students are likely to volunteer to receive an investment benefit given that most are in the life-cycle stage where they are seeking to develop human capital with work experience and skill development, as well as developing networks to maximize employment and promotion opportunities. The second proxy is self-employment status (1=yes; 0=no). The rational is based on the belief that many self-employed individuals are involved in businesses reliant on forming networks, so volunteering is a means to meet people and create networks. The third proxy variable represents a company policy to encourage volunteer participation by employees (1=yes; 0=no). Those whose employers encourage volunteering may choose to participate in volunteer activities to improve the likelihood of promotion and higher earnings in the future. The third proxy is not included in Model 2 (general volunteering) because the question is only asked to those who have volunteered.

Consumption and altruistic benefits

A pure consumption benefit is measured with a dichotomous variable for the response to the question of whether the individual was asked to volunteer (1=yes; 0=no). Previous research has shown that individuals are more likely to volunteer when asked (Freeman, 1997). The tendency of individuals to volunteer when

asked can be explained with the concept of a "conscience good" which describes a good or service one provides out of a feeling of social pressure (Freeman, 1997). This variable is not included in Model 2 (general volunteering) because the question is only asked to those who have volunteered.

Two proxy variables represent both consumption and altruistic benefits. The proxy variable of retirement is measured with sample members in the age range of 55 and older. Ziemek (2006) used retirement as a variable to measure both consumption and altruistic benefits. Retired or almost-retired individuals are likely to volunteer for personal consumption or altruistic benefits because they are past the life-cycle stage where they are concerned with investment benefits such as promotion opportunities. The proxy variable of informal volunteering (1=yes; 0=no) is expected to be motivated by consumption and/or altruism benefits, because it lacks the formal recognition gained when volunteering for an organization, such as a development agency.

Time cost variables

The opportunity costs are measured in terms of time constraints due to family and employment. The proxy variables are the presence of children in the household (1=yes; 0=no) and the numbers of hours worked per week in paid employment (1=40 or more hours per week; 0=less than 40 hours per week). Van Dijk and Boin (1993) used both these variables as measures of time costs of volunteering.

Socio-economic variables

The socio-economic variables are listed and described in Table 2.

Table 2: Socio-economic variables

Variable Name		*Description*
Gender	Male	Gender of the respondent (Male=1; female=0).
Education	Postsecondary education	Respondents whose educational attainment includes at least some postsecondary education (1=yes; 0=no).
Age (2 variables)	35–54 years 55+ years	Respondents in the age range 35 to 54 (1=yes; 0=no). Respondents in the age range 55 and over (1=yes; 0=no).
Household income (2 variables)	$40,000–100,000 $100,000 +	Respondents for whom annual household income was in the range $40,000 to $100,000 (1=yes; 0=no). Respondents for whom annual household income was greater than $100,000 (1=yes; 0=no).
Religiosity	Religious attendance	Respondents who attended a religious service or meeting at least weekly (1=yes; 0=no).
Immigration status	Canadian-born	Respondents who were born in Canada (1=yes; 0=no).
Attachment to community	Time in community	Respondents who have lived in the community for at least five years (1=yes; 0=no).
Participation in charitable giving	Charitable donations	Respondents who have participated in charitable giving to at least one organization in the past year (1=yes; 0=no).

RESULTS

This section presents the results of empirical testing of the four models. Frequency and percentage distribution statistics of voluntary participation in community economic development according to socio-economic characteristics are presented in Table 3. The results show that 54% of CED participants are female, 74% have

at least some postsecondary education, 47% are between the ages of 35 and 54, 40% have a household income in the range of $40,000–$100,000, 22% attend religious meetings at least weekly, 80% have lived in their community for at least five years, 87% were born in Canada, and 95% made a charitable donation in 2004.

Table 3: Frequency and percentage distribution of voluntary participation in community economic development according to their socio-economic characteristics (*n*=1302)

Socio-economic characteristics	Frequency	(%)
Age		
15–34	316	24.2
35–54	614	47.2
55+	372	28.6
Total		*100.0*
Gender		
Female	703	54.0
Male	599	46.0
Total		*100.0*
Education maximum		
High school diploma	338	26.0
At least some postsecondary	964	74.0
Total		*100.0*
Household income		
<$40,000	131	10.1
$40,000-$100,000	903	40.7
$100,000+	268	20.6
Total		*100.0*
Religious attendance		
At least weekly	287	22.0
Less than weekly/never	1015	78.0
Total		*100.0*
Time in community		
Less than 5 years	263	20.0
≥5 years	1039	80.0
Total		*100.0*
Immigrant status		
Canadian born	1130	87.0
Immigrant	172	13.0
Total		*100.0*
Charitable donations		
Participant	1238	95.0
Non-participant	64	5.0
Total		*100.0*

Source: 2004 Canada Survey of Giving, Volunteering and Participating (CSGVP)

The marginal effects of the explanatory variables on the decision to participate in Models 1 and 2 are presented in Table 4. The marginal effects of the explanatory variables on additional time devoted to voluntary participation in Models 3 and 4 are displayed in Table 5.

Table 4: Marginal effects for participation in community development and general volunteering

	CED (Model 1)	*Volunteering (Model 2)*
Children	.008*	.287**
	(.004)	(.042)
Hours worked	.010**	-.195**
	(.003)	(.042)
Male	.004	-.150**
	(.003)	(.038)
Postsecondary education	-.003	-.223**
	(.005)	(.049)
Age: 35–54	.012**	.0003**
	(.004)	(.047)
55+ (retired)	.020**	.027*
	(.007)	(.059)
Household income: $40,000–100,000	.006	.082*
	(.005)	(.041)
$100,000+	.006	.174**
	(.004)	(.057)
Consumption benefit: Asked	.043**	-
	(.005)	
Altruistic benefit: Informal volunteer	.022**	.433**
	(.004)	(.053)
Investment benefits: Student	.016**	.673**
	(.006)	(.059)
Employer policy	.046**	-
	(.009)	
Self-employed	.054**	-
	(.009)	
Time in community	-.002	.073
	(.008)	(.041)
Canadian-born	.005	.166**
	(.004)	(.049)
Religious attendance	-.004	.462**
	(.004)	(.047)
Charitable donations	.016**	.060**
	(.005)	(.094)
Wald Statistic	514.69	604.07

Note: Robust standard errors are reported in parentheses.
* indicates significance at the level $p<0.05$.
** indicates significance at the level $p<0.01$.
Probit is used for the CED regression and ivprobit for the volunteering regression.

Table 5: Marginal effects for hours spent on participation in community development and general volunteering (ivtobit model)

	CED (Model 3)	*Volunteering (Model 3)*
Children	-.145	-.099*
	(.123)	(.049)
Hours worked	-.75**	-.520**
	(.299)	(.132)
Male	.076	.154**
	(.122)	(.050)
Postsecondary education	-.512**	-.349**
	(.155)	(.070)
Age: 35–54	.212	.206**
	(.141)	(.054)
55+	.355	.323**
	(.203)	(.081)
Household income: $40,000–100,000	-.001	.086
	(.129)	(.051)
$100,000+	.287	.224**
	(.163)	(.065)
Consumption benefit: Asked	.278*	-.426**
	(.102)	(.040)
Altruistic benefit: Informal volunteer	.323	.367**
	(.249)	(.075)
Investment benefits: Student	-.337	-.026
	(.179)	(.073)
Employer policy	.16	-.014
	(.137)	(.061)
Self-employed	.114	.256**
	(.140)	(.056)
Time in community	.136	.124**
	(.127)	(.051)
Canadian-born	-.344**	.095
	(.139)	(.058)
Religious attendance	.195	.591**
	(.125)	(.046)
Charitable donations	-.370	.102
	(.240)	(.081)
Wald Statistic	67.12 **	573.87**

Note: Robust standard errors are reported in parentheses.
*indicates significance at the level $p<0.05$.
** indicates significance at the level $p<0.01$.

PARTICIPATION MODELS

Overall, the specifications of Models 1 and 2 are robust.[7] The results of Model 1 support the predictions of economic theory as they imply that both private and public benefits increase the likelihood of volunteering for CED organizations. The investment benefit of volunteering for CED is an important determinant as evidenced by the significance of student status, self-employment status, and working for an employer with a policy to promote volunteer activities. Self-employment status has the largest marginal effect, suggesting that self-employed individuals have a 5.4% higher likelihood of volunteering for a CED organization than those who are not self-employed. The consumption benefit is also a determinant as evidenced by the asked variable. Support for the public benefit is suggested with the significance of participation in informal volunteer activities and a higher probability of participation by those over the age of 55.

The results for the time costs of participating in CED organizations are mixed. As predicted by economic theory, hours worked has a negative and significant coefficient, implying that those who work more than 40 hours per week have a lower probability of volunteering for CED than those who work fewer than 40 hours per week. However, contrary to economic theory, the presence of children in the household is positive and significant, suggesting that having children increases the likelihood of volunteering for CED. This unexpected result may be explained by a parent's concern for the future state of society and thus a greater willingness to participate in CED in order to better the world for her or his children (Dupont, 2004). With the exception of the presence of children variable, the results provide support for Hypothesis 1.

The socio-economic variables age and charitable donations are both positive and significant. The likelihood of volunteering for CED organizations increases with age and is highest for those over the age of 55. Those who make charitable donations are more likely to volunteer for CED than those who do not, implying that donating and volunteering are complements rather than substitutes. Gender is not a determinant of voluntarily participating in a CED initiative and thus there is no support for Hypothesis 3.

Empirical results for Model 2, the general volunteering model, reveal that the significance of the benefits and time cost variables are reasonably consistent across both models. The uniqueness of volunteering for CED organizations is revealed by the difference across the socio-economic factors, offering support for Hypothesis 4. While the likelihood of volunteering in Canada appears to increase with household income, education, and religious involvement, and to decrease with immigrant status, none of these factors are significant determinants of volunteering for a CED initiative.

TIME DEVOTED TO PARTICIPATION

Overall, the specifications of Models 3 and 4 are robust.[8] Model 3 results suggest limited support for Hypothesis 2 given that only the private consumption benefit, indicated by being asked to volunteer, increases the likelihood of devoting more time to CED organizations. Both measures of time costs of volunteer participation are negative, as expected, but only hours worked is significant. In support of economic theory, those who work fewer than 40 hours per week are 75% more likely to spend additional time volunteering for CED than those who work more than 40 hours per week. The socio-economic variables of education and country of birth are statistically significant. The results imply that those with less than postsecondary education have a 51% higher probability of devoting more time to volunteering for CED. Immigrants have a 34% higher probability of spending additional time on CED than those who are Canadian-born. Economic theory is not as effective at explaining the time devoted to CED as it is at explaining a decision to participate.

Empirical results for Model 4, general volunteering, indicate that the set of determinants of the time devoted to volunteering for CED differs from those for volunteering in general. For general volunteering, both private and public benefits are significant determinants of the additional time devoted to general volunteering, contrary to volunteering for CED where only the private consumption benefit is significant. The socio-economic variables of gender, age, income, time in the community, and religious attendance are uniquely significant determinants for the amount of additional time spent on volunteering in general, but not on volunteering for a CED initiative, thus providing support for Hypothesis 5.

SUMMARY

The empirical results indicate that the determinants of the decision to volunteer and to devote additional time to CED organizations are different from those of volunteering in general. As predicted, household income is not a significant determinant of CED initiatives as it is for general volunteering. The gender results for participation and time devoted to CED are unexpected given that the CED literature emphasizes the important role of women (Conn, 2006; Shragge, 2003). Perhaps gender is influenced by the unavailability of affordable daycare or even the nature of community economic activities. Further research on gender is required to sort out the relationship between gender and participation and time devoted to CED activities. Although education is not a determinant of participation in CED, it is significant and negative for the time devoted to CED activities. Individuals with less than postsecondary education have a higher probability of devoting additional hours to CED activities.

In sum, the results provide support for economic theory evidenced by the increased likelihood of participation in CED activities associated with private consumption and investment benefits and possibly altruism benefits, and the decreased likelihood associated with the number of hours spent working for pay. The likelihood of participating is positively affected by the presence of children in the household, an increase in age, and participation in charitable giving. The unpredicted positive influence of children on participation may indicate an investment or consumption benefit rather than an opportunity cost. Parents may participate as an investment in future community betterment for their children or they may participate in community and neighbourhood projects related to their children's activities to fulfill social norms.

The probability of devoting additional time toward CED activities is positively affected by consumption benefits and negatively affected by the number of hours spent working for pay, providing some support for economic theory. The CED literature provides support for the significance of the probability of devoting additional time being positively affected by immigrant status and negatively affected by postsecondary education. The level of involvement of immigrants is not surprising given the numerous immigrant-focused CED organizations. Those with less than a postsecondary education likely have the most to gain from devoting additional hours to CED projects, particularly in the areas of job training programs and vocational counselling and guidance.

Unlike general volunteering, the probability of volunteer participation in CED does not appear to be influenced, either positively or negatively, by gender, postsecondary education, household income, immigration status, or degree of religious involvement, as none of these variables are significant. Likewise, the likelihood of spending additional time on CED activities does not appear to be affected by gender, age, length of time spent living in the community, or degree of religious involvement, as indicated by the lack of statistical significance of those variables.

POLICY IMPLICATIONS AND CONCLUSIONS

Public policy

The determinants of voluntary participation in CED provide useful information for public policymakers for developing effective programs to support the CED sector. For instance, the public sector might develop programs for the purpose of increasing private and public benefits in order to stimulate a higher level of participation in CED activities. Public policy can address consumption and altruistic benefits by providing public information through media about the value of participation in the CED sector, such as building a community understanding and appreciation of CED volunteers and the contributions they make to the community, economy, and society. For example, an individual motivated by consumption benefits may become aware of the fulfillment of social norms and the potential achievement of social status associated with participation, whereas an individual motivated by altruistic benefits will become informed about the important contributions to the community and may subsequently be motivated to participate by a sense of moral obligation. Similarly, public policy can address investment benefits by providing public information through media about the opportunities for skills development, work experience, and networking from participation in CED.

Public policy directed at improving the success rate of CED initiatives is expected to have a positive effect on the consumption benefit, and perhaps the altruistic benefit, and subsequently on voluntary participation in CED. For example, in order for an individual to experience the "warm glow" effect associated with doing something good, she or he must believe that their involvement in the proposed volunteer project will make a positive contribution to society (or the community). For instance, if potential volunteers do not believe that a community initiative will get off the ground or be successful, then there is no potential for the "warm glow" effect. In a similar manner, an altruistic benefit is associated with the provision of a needed good or service, such as job training or housing. If a CED project is not expected to result in the provision of something for the public good, then the altruistic benefit will not be realized. The issue of expected success of a project is particularly relevant to CED as explained earlier, where CED practitioners often face challenges in motivating and bringing together community residents and dealing with defeatist attitudes stemming from years of unsuccessful attempts at development (Fontan, Hamel, Morin, & Shragge, 2006; Shragge, 2003).

Proposed programs to support CED may include, for example, the provision of funding, financing, tax credits for private investment in CED, and procurement policy. While there are many different types of tax incentives, a tax credit program is regarded as the most effective type of tax incentive program (Perry, 2009). For example, the public sector could assist in the provision of funding by implementing a comprehensive tax credit program for CED projects similar to the Community Development Financial Authority (CDFA) in New Hampshire in the United States (Perry, 2009). Some provinces, such as Nova Scotia and Manitoba, have provided tax credits for CED projects, but only to individuals. The New Hampshire program also provides tax credits to corporations and banks. In addition, the CDFA provides programs to address competence and capacity in the CED sector.

The results provide support for the notion of providing a tax incentive for volunteer participation, similar to the tax credit for charitable giving. Hours devoted to paid work have a negative impact on the probability of volunteering for CED and on the probability of devoting more hours to volunteering, implying that some form of compensation would reduce the costs of volunteering, thereby increasing the likelihood of participating in volunteer activities. It is noted that existing literature on the topic of proposed tax incentives for volunteering

does not reach a consensus about the expected effectiveness of such an incentive (Frey & Goette, 1999; Spyker & Peloza, 2009).

CED policy and practice

Many of the public policy strategies discussed above are pertinent to the CED community, particularly intermediary organizations such as CCED-NET.[9] In addition, the research results suggest implications for CED policy and practice. Strategies to increase the number of volunteers and the amount of time devoted to volunteer activities might involve enhancing the private and public benefits. For example, activities to increase consumption benefits might include providing recognition for contributions to the project and to the community through articles and commendations. Forming a connection between a specific volunteer task and its contribution to the CED project and to the community is important in providing a sense of satisfaction associated with the consumption benefit.

CED organizations may enhance investment benefits by increasing opportunities to develop skills, gain work experience, and build networks. Given the significance of the investment benefit in the empirical results, one strategy is to target youth. For instance, some university and college programs—marketing and human resources, for example—include courses that require student-applied projects for non-profit organizations.

CED organizations can take steps to increase participation and the number of hours of volunteering by assigning volunteers to tasks according to their particular motivations and characteristics. Volunteer data could be collected through a survey questionnaire on demographic characteristics, motivations, and personal interests. Past research shows that matching volunteers to activities that correspond with their motivations will increase levels of participation and increase retention rates of volunteers (Peterson, 2004; Hibbert, Piacentini, & Al Dajani, 2003; Clary, Snyder, & Ridge, 1992). For example, younger volunteers are more likely to volunteer for investment benefits while more mature volunteers are more likely to volunteer for consumption benefits associated with making new social connections and spending time with people (Peterson, 2004). Research on participation in a community-based food cooperative by Hibbert, Piacentini, and Al Dajani (2003) reports the importance of volunteer participants having a matching interest in the particular characteristic of a given CED project. For example, one volunteer for the food retail cooperative emphasized that she loved to cook while another expressed strong views about the need for access to low-priced food for low-income families.

Based on the heterogeneity of CED organizations, it is reasonable to assume that some projects and organizations are likely to provide greater opportunities for investment benefits while others are likely to offer greater opportunities for consumption or altruistic benefits. The creation of a central CED volunteer recruitment centre, at the municipal or community level, may provide a method of matching prospective volunteers with projects they find more relevant and rewarding. Given that many municipalities have volunteer recruitment and referral services organizations in place,[10] it is suggested that CED organizations use these organizations as a recruitment vehicle. Such a matching process is expected to increase the level of participation and the level of volunteer satisfaction, thus leading to more volunteer hours and higher volunteer retention rates.

Given that voluntary participation in CED and making charitable donations are complementary and that CED organizations are often involved in attracting both volunteers and donations, the organizations may benefit from cross-marketing. The empirical results imply that those who make charitable donations are more likely to participate in CED.

CONCLUSION

The four models associated with the analysis of the determinants of voluntary participation and time devoted to CED in Canada developed for analysis in this paper proved to be robust and stable; however, the statistical analysis faces some challenges and limitations.

First, the empirical analysis in this paper utilizes existing survey data, which results in three limitations:

1. Voluntary participation in a CED organization does not necessarily indicate that it is taking place in the community where the individual resides. While all participation in CED is beneficial, participation by community residents is vital to ensure that CED initiatives are developed and implemented to meet the needs of the community as expressed by the community.

2. A couple of variables believed to be relevant could not be included due to the constraints of using existing survey data. The first is a variable to measure the probability of success of participation, found in related models (Pattie, Seyd, & Whiteley, 2003; Bryant & White, 1982). The second is a variable to measure the role of leadership in motivating participation in CED. The role of leadership in developing CED initiatives and in encouraging participation is frequently discussed in the CED literature (Loxley, 2007; McIntyre & Lotz, 2006; Shragge, 2003).

3. It is difficult to find quality proxy variables from existing survey data to measure and distinguish between the consumption benefit and the altruistic benefit. Future research could deal with this issue by developing a survey with questions designed to differentiate the two benefits.

Second, individual decisions to participate in CED are thought to be influenced by the socio-economic environment, particularly the labour market situation, the city size, the homogeneity of the population, the government provision on CED initiatives, and the demand for CED initiatives. The current research does not address this issue. Future research is needed to investigate the relevance of such variables (Dowling & Chin-Fang, 2007; Ziemek, 2006; Van Dijk & Boin, 1993).

The comparison of determinants of CED and general volunteering reveals no substantial differences between the benefits motivating individuals to participate in volunteer activities. On the question of devoting additional time to volunteering, the differences are more evident as both private benefits and public benefits positively influence general volunteering while only the private consumption benefit influences additional time for CED. Most of the variation in empirical results between general volunteering and volunteering for CED can be explained by differences in the socio-economic factors. These differences may be partially explained by the contextual differences in the sample populations of those who volunteer in general as compared to those who volunteer for CED. Given that CED is most often focused on communities characterized by lower income and lower education demographics, it is not surprising that household income has a positive effect on volunteering in general but no significant effect on volunteering for CED. Future comparative research could investigate the determinants of volunteering for CED as compared to volunteering for other non-profit sectors, such as sports and recreation, education, religion, and health.

Finally, the economic analysis does confirm many of the determinants of participation identified in the qualitative CED research, such as the positive influence of expected benefits and the negative influence of costs such as hours worked for pay. The analysis also reveals the positive influence of some variables that had not been identified, such as age. These newly identified variables should be incorporated into future qualitative CED research. This economic approach to investigating volunteer participation in CED is intended to inform other CED researchers of an alternative method of understanding volunteer motivations. Further, this approach is intended to inform researchers investigating volunteering by revealing the consequences of an economic approach to analyzing volunteer motivations for specific voluntary subsectors. The result of this economic modelling provides important insights into volunteering that are relevant for policymakers and practitioners alike.

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NOTES

1. Refer to the following sources for examples of provincial government engagement in CED: "Using CED Principles to Build Strong Neighbourhoods," http://www.gov.mb.ca/housing/neighbourhoods /news/pdf/forum2.pdf **;** "Team players: Good news from Nova Scotia about the role of government in CED," Perry (2003).

2. Market failure is a situation in which a free market fails to allocate goods and services efficiently.

3. CED initiatives often produce goods and services that are public or quasi-public. A public good is by definition both non-rivalrous and non-excludable. Non-rivalrous means the consumption of the good by one individual will not reduce the supply available to other individuals (e.g., cable television, clean air). Non-excludable means it is impossible to exclude anyone from consuming the good (e.g., national defence, fireworks display). A quasi-public good is public in nature but is not completely non-rivalrous and/or non-excludable.

4. Selectivity bias results in the error terms in the hours of participation equation being correlated with their counterparts in the selection equation, and regression results derived from data for the subpopulation of those participating in volunteer activities to be statistically biased and inconsistent measures. The Heckman sample selection model using the maximum likelihood approach is used to mitigate the bias.

5. The maximum likelihood approach is a method of estimating asymptotically efficient parameters of a statistical model.

6. Volunteer organization categories include education and research, culture and recreation, health, social services, environment, development and housing, law, advocacy and politics, philanthropic intermediaries and voluntarism, international, religion, and business and professional associations, union (12 categories) (International Classification of Nonprofit Organizations (ICNPO)).

7. The Wald test for independent equations reveals that the null hypothesis is not rejected, thus the equations are independent and do not require the Heckman selection model to estimate Models 1 and 2. The Wald test for exogeneity reveals that neither hours worked nor participation in charitable giving are endogenous variables in Model 1 and is thus estimated with a probit model. The Wald test for exogeneity reports hours worked is not endogenous but participating in charitable giving is endogenous, thus the ivprobit model is used to estimate Model 2.

8. The Wald test for independent equations reveals that the null hypothesis is not rejected, thus the equations are independent and

do not require the Heckman selection model to estimate Models 3 and 4. The Wald test for exogeneity reveals that hours worked is an endogenous variable in Models 3 and 4, thus the ivtobit model is used to estimate both models.

9. The Canadian CED Network (CCED-NET) is a national-level member-led organization: www.ccednet-rcdec.ca .

10. For example, in the City of Kamloops, a non-profit organization called Volunteer Kamloops provides volunteer recruitment and referral services for their members, who could be any group undertaking a volunteer project in the community: www.volunteerkamloops.org/aboutus.htm .

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Book Review

by Diana Smith

Researching the Social Economy. *Edited by Laurie Mook, Jack Quarter, and Sherida Ryan.* Toronto, ON: University of Toronto Press. Toronto, ON: University of Toronto Press. Québec. 2008. 320 pp. ISBN 9780802099532.

Researching the Social Economy is a collection of original essays on the emerging concept of "social economy" in Canada. In 2005, the Social Sciences and Humanities Research Council (SSHRC) funded a five-year regional and national social economy research program. This sparked a multitude of initiatives and actions across Canada, including those chronicled in this collection from the Southern Ontario Node of the Social Economy Research Hub. In their own work, the editors, Mook, Quarter, and Ryan, build on the foundation of their model of the social economy, elaborated on in their 2009 publication, *Understanding the Social Economy,* but the text as a whole is more than that. *Researching the Social Economy* is a series of essays that are a combination of reviews, conceptual analyses, and action research in various contexts. As the authors suggest, and I concur, this is the beginning of a much-needed Canadian research focus on the social economy and civil society in all of its complexity and richness. This book will be of interest to scholars, students, practitioners, and planners who are seeking creative and innovative perspectives to address challenging social and economic issues. The collection is diverse and the scope vast, but the interrelationship between each essay is largely left unexplored, resulting in a somewhat fragmented whole. Nevertheless, it makes a significant contribution to the body of inquiry and research.

The social economy is a contested space and concept, emergent and varied in its conceptual and theoretical definitions, as is addressed in the introductory chapter by the authors. In fact, the first six chapters of the book provide a contextual and comparative analysis of the complexity of the social economy in Canada (focused on Ontario and Quebec) and Europe.

The remainder of the book highlights specific action research projects that explore the efficacy and relevance of the social economy. The foci are diverse, ranging from climate change, the online social economy, work stoppages, organic farming, and corporate volunteerism. I am sure there are many ways to view this text's arguments, but I view community as the primary conceptual framework. I struggle with "economy" as the overriding context as suggested by the concept of social economy. What is the "civil society" in a social economy context? The framing of the social economy seems to provide only partial recognition of the research on sustainability, corporate social responsibility, social movements, social innovation, nonprofit studies, volunteerism, and public policy relating to citizen engagement, the democratic deficit, and social inclusion.

The individual initiatives (action research – case/issue specific in the second half of the book) warrant their own review. Seen as a collection, they raise a number of questions for further investigation and dialogue. So do the common themes: the need for innovation/stability in financing and leadership, emerging organizational forms, capacity development, legitimacy, and recognition. They raise for me two key questions:

- Can diverse topics such as online approaches, corporate volunteerism, organic farming, climate change initiatives, high school community service, and reaching immigrant populations be viewed as contributing to a "whole"? Are they scalable?

- How does social economy research link to the fields of community development, citizen engagement, capacity development, social movements, democratic reform, and sustainability?

While they do not answer these questions directly, Mook, Quarter, and Ryan conceptualize the social economy as a paradigm that aligns social good and private value in institutional forms (non-profits and cooperatives) and value-based practices to foster social inclusion, economic well-being, and progressive change in society. The book succeeds in raising the level of discourse about the social economy sector, a huge gap in the public policy, academic, and capacity-building context. Mapping of the territory and the accompanying analysis are an important contribution to the theoretical frameworks for understanding and evaluating the social economy as both a definitional and conceptual framework. While underdeveloped, these frameworks may in the end provide the key to answering the above questions. In any event, the focus on recognizing and exploring the interrelationship between the public and private spheres is a strength and a significant contribution to social economy scholarship.

Another key contribution of the book lies in its forefronting of the role of government in relation to the social economy, which is addressed from varied perspectives. This contribution is also one of the limitations of the book as the focus is on the provincial level (and only Quebec and Ontario), likely an outcome of the original mandate. Notable among the provincial foci is the way in which Mendell and Neamtam ably highlight the distinct society in Quebec, the roots of the social norms, political culture, and public policy interventions to support a social economy. However, one wonders about the applicability of this example, as other parts of the country do not share many of the same roots and traditions. There are significant regional distinctions throughout Canada that warrant further research and inquiry and there is only passing reference to the significance of federal policy in areas such as charitable status, laws governing finance, access to stable funding, research and development, and the impact of a neo-conservative agenda. The role of local and regional government is absent, a contradiction for much of the community development literature and practice which could otherwise be seen to be part of the social economy tradition.

A final, if more minor, issue is the fact that this collection of research on the social economy pays too little attention to the environmental sector (with the exception of the case studies on climate change and organic farming) in my opinion. Environmental organizations, the environmental movement, sustainable development, etc., have much to contribute from the perspective of an ecological mindset, whole systems perspectives, and the experience of straddling the public/private/non-profit "silos." The environment, along with the social economy, is the third leg in the sustainability "stool" and should be forefronted more than it is in the literature.

Researching the Social Economy provides much food for thought, and, for me, raises as many questions as it provides answers. I was excited, challenged, and frustrated by the diversity that the text presented.

Specifically, I was excited by the possibilities of reframing community innovation and change in the social economy context. I was challenged and frustrated by the lack of synthesis and integration within the text as a whole. In the end, I was left wrestling with questions such as:

- How does the social economy connect to social inclusion? Canada is diverse, its regions and communities varied. There are important challenges for particular groups including issues surrounding immigrants, the urban/ rural split and indigenous peoples that are not addressed in this text.

- How do community and economy relate to and engage with each other?

- What are the emerging approaches to governance that will support change?

- How do the conceptual frames of the social economy reconcile varied roles in society? For example: the consumer, the client, the worker and the citizen?

- Where is the public discourse likely to occur? Kitchen tables? Downtown urban neighbourhoods? A picket line? A community centre? A job site? A corporate boardroom?

In the end, perhaps the greatest contribution of this text is that it raises these questions and opens up a space for dialogue on these and other issues through its diversity. *Researching the Social Economy* contributes to the field of inquiry and discourse about the society we want, and the means by which we will realize the collective vision for the future.

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Compte-rendu de livre

par Nathalie McSween

Mouvement coopératif. Une mise en perspective. *By Louis Favreau.* Québec : Presses de l'Université du Québec. 2010. 156 p. ISBN 9782760526211.

Le libre-marché est de plus en plus discrédité comme instrument d'enrichissement collectif et de redistribution sociale (Stiglitz, 2010), mais aussi comme instrument capable d'assurer la sécurité alimentaire du plus grand nombre (Boussard et Delorme, 2007) et la survie de la planète (Kempf, 2009). De plus en plus d'intellectuels et de militants (et d'intellectuels militants!) cherchent des alternatives au modèle économique capitaliste. Ce n'est d'ailleurs pas une coïncidence si le mouvement altermondialiste a pour slogan « Un autre monde est possible » : cet appel à penser des alternatives est révélateur du renouveau des imaginaires politiques qui est en cours dans différentes parties du monde, notamment au sein des mouvements sociaux et entre ceux-ci (dans le cadre des Forums sociaux mondiaux, par exemple). Incidemment, nombre de ces échanges entre mouvements sociaux portent sur les initiatives et alternatives concrètes imaginées et mises en œuvre dans différentes parties du monde et ce, afin d'en tirer des éléments de proposition pour donner forme à de nouveaux modèles. Le nouvel ouvrage de Louis Favreau, *Mouvement coopératif. Une mise en perspective*, s'inscrit dans cette foulée.

Dans cet ouvrage, Favreau défend deux thèses complémentaires, soit : 1) que le réseau des coopératives québécoises constituent un « mouvement coopératif », en ce sens qu'il contribue à changer la société en mettant en œuvre des alternatives concrètes au modèle dominant et 2) que la logique coopérative constitue une piste porteuse – et concrète – de sortie du capitalisme.

Dans les deux premiers chapitres de l'ouvrage, Favreau présente un portrait des coopératives québécoises 1) en tant que réseau d'entreprises collectives qui contribue significativement à la santé et au développement de l'économie québécoise (88 000 emplois, 22 milliards de dollars de chiffre d'affaire annuel, un taux de survie après cinq ans qui dépasse largement celui du privé…) et 2) en tant qu'acteurs socioéconomiques qui contribuent activement au développement des régions (mobilisation des acteurs locaux, levier de revitalisation, emplois et activités économiques non délocalisables…). Par ce biais, Favreau souligne que les coopératives ne sont pas des acteurs marginaux au Québec, mais qu'elles constituent une force économique et un levier de développement. Par la suite, dans le troisième chapitre, Favreau présente le renouvellement du réseau coopératif québécois qui, interpellé par la mondialisation et les multiples crises en cours, est en train de se repenser et de se redéployer : nouveaux types de coopératives (coopératives de solidarité…); nouveaux secteurs (commerce équitable, santé...); accroissement des activités internationales du Conseil

québécois de la coopération et de la mutualité (CQCM)… Bref, les trois premiers chapitres de l'ouvrage nous laissent avec l'idée que les coopératives québécoises sont solides au plan économique, qu'elles sont ancrées dans leur milieu et que la formule coopérative est suffisamment flexible pour apporter des réponses innovantes aux nouveaux besoins et aux nouvelles réalités de notre société. C'est ainsi qu'est mise la table pour ce qui m'apparaît être le cœur de l'argumentaire de l'auteur.

En effet, dans les chapitres suivants (chapitres 4 à 6), Favreau s'applique à démontrer que les coopératives québécoises sont *aussi* des acteurs sociopolitiques. Sa démonstration s'appuie sur trois éléments : 1) les coopératives québécoises ont contribué et contribuent à la construction d'une économie solidaire (et donc à la construction d'une alternative concrète au modèle capitaliste); 2) ces coopératives ont souvent été constituées dans le prolongement de luttes sociales menées par des mouvements sociaux (les mutuelles d'assurance au sein du mouvement syndical, les coopératives scolaires au sein du mouvement étudiant, les garderies populaires au sein du mouvement des femmes, les coopératives d'habitation au sein du mouvement communautaire…); 3) les coopératives québécoises participent, notamment par le biais de leur réseau international (l'Alliance coopérative internationale), aux réflexions en cours sur le développement d'un modèle économique alternatif qui mettrait la logique coopérative en son centre et elles contribuent, par le biais de DID et de SOCODEVI, à diffuser dans les pays du Sud l'alternative concrète que constitue le modèle coopératif.

La démonstration est étonnante : sauf exception, les sociologues des mouvements sociaux ne considèrent pas les réseaux coopératifs comme des mouvements sociaux et ce, essentiellement parce que les coopératives sont des associations de personnes qui, face à des besoins ou des problèmes communs, ne font pas appel à la contestation ou à d'autres modes d'action de nature sociopolitique davantage associés aux mouvements sociaux, mais choisissent plutôt de mener des activités économiques à finalité sociale. L'argument fait par Favreau est que ce mode d'action crée des alternatives concrètes au modèle dominant et, de ce fait, constitue une contribution au changement social. Cette dernière affirmation est sans doute vraie, mais ne permet pas à elle seule de parler de mouvement social au sens où on l'entend généralement dans la sociologie des mouvements sociaux (Neveu, 2002). De même, le fait que de nombreuses coopératives aient été créées par des mouvements sociaux ne suffit pas pour parler de mouvement coopératif. S'il est plus usuel de considérer la participation à des réseaux internationaux comme un mode d'action sociopolitique, on le fait cependant rarement en ce qui concerne les actions de coopération internationale. Bref, si la démonstration de Favreau en ce qui concerne le « mouvement coopératif » est bien accrochée au terrain de la coopération québécoise (qu'il connaît bien), elle sort des définitions théoriques usuelles (mais non consensuelles[1]) de ce qui constitue un mouvement social dans la littérature sociologique. Par-delà ces considérations conceptuelles cependant, ce que la démonstration de Favreau a le mérite de rendre visible est quelque chose qui est rarement mis en relief par les chercheurs qui s'intéressent aux coopératives au Québec, soit l'origine militante des coopératives ainsi que les liens souvent étroits de certains réseaux coopératifs avec d'autres réseaux militants au Québec.

Là où la démonstration de Favreau prend tout son intérêt, à mon sens, est dans le septième et dernier chapitre. Il reprend alors sa question de départ et y propose des éléments de réponse : Un « autre monde » est-il possible? Existe-t-il, hors des grandes utopies socialistes, des alternatives concrètes au modèle économique capitaliste qui permettraient que l'économie respecte les équilibres écologiques et soit porteuse de justice économique et sociale? Pour Favreau, « des alternatives sont déjà là » (p. 122) dans les pratiques de différents mouvements sociaux, dont le mouvement coopératif, au Québec et de par le monde. Il s'agit d'en faire les fondements d'un nouveau projet de société et même, pourquoi pas, d'un « *new deal* écologique et social québécois et planétaire » (p. 123), en y adjoignant une vision globale rassembleuse et porteuse de

changements économiques et sociaux. Une telle analyse a ceci d'intéressant qu'elle propose d'allier pragmatisme (les « alternatives qui sont déjà là ») et utopie (projet de société) et qu'elle permet d'envisager des convergences entre des réseaux coopératifs et d'économie sociale ancrés dans la réponse concrète à des besoins collectifs et des réseaux militants davantage contestataires.

Bref, *Mouvement coopératif…* est un ouvrage que devraient lire non seulement les coopérateurs, mais aussi les militants des mouvements sociaux québécois qui, dans le cadre des crises actuelles, sont à la recherche d'alternatives au modèle capitaliste. Ils sortiront de cette lecture avec l'impression que non seulement il est possible de penser des alternatives au modèle dominant, mais qu'on ne part pas de zéro puisqu'il est possible de s'inspirer des milliers d'expériences au Québec et dans le monde qui mettent déjà en œuvre un modèle économique alternatif fondé sur la logique coopérative.

NOTE

1. Comme l'a soulevé Fillieule (2009) et, avant lui, Diani (1992), la définition de ce qui constitue, ou pas, un mouvement social est loin de faire l'unanimité chez les chercheurs.

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Book Review

by Lina Ochoa

Policy Initiatives Towards the Third Sector in International Perspective. *Edited by Benjamin Gidron and Michal Bar.* New York, NY: Springer, 2010. 223 pp. ISBN 978-1-4419-1258-9.

The third sector has come to play an increasingly significant role, not only for international development assistance policies in developing countries, but also in developed countries as part of everyday domestic politics. It is to these national processes of policy initiatives that this new book, edited by Benjamin Gidron and Michael Bar, is devoted. *Policy Initiatives Towards the Third Sector in International Perspective* helps us understand a policy actor, the third sector, that has become increasingly visible and influential, yet has been subject to multiple interpretations and misguided assessments. Overall, the third sector has been viewed in a sort of dual manner: either through a paternalist, condescending lens, which has prevailed mostly in poor countries or whenever the sector is rather incipient, or through a "managerialist" lens, pretending to be an apolitical and socially neutral force, concerned more with the private sector standards and trends. Challenging these biased and incomplete approaches, Gidron and Bar present us with this new book that compiles policy initiatives toward the third sector in eight countries (Canada, the U.S., Germany, Japan, Ireland, Hungary, Israel, and the U.K.) over the last three decades. This research addresses the political processes aimed at third sector organizations, based on the analytical framework laid down by Kingdon (1995) and that of Sabatier and Jenkins-Smith (1999), to refute conventional models of policy design and implementation. The main issues addressed in each case study are the conditions under which policy change took place, the "windows of opportunity" that opened up, and how different policy players exploited these opportunities with various degrees of success.

The key argument throughout the book is that these policy initiatives are complex, uncertain, and unforeseeable, resulting in unanticipated and/or undesired outcomes. Such initiatives are developed in processes that are permanently affected by disputed leadership and interpretations, and thus do not fit the usual approaches for policy analysis. Building on an actor-identification exercise, not only collective actors but also individuals—epitomized in the figure of the "policy entrepreneur"—recurring dilemmas and conflicts are highlighted between the third sector and government and private sector players. The ensuing lack of confidence, divergent expectations, and lack of commitment between various agencies are dealt with using the tools of organizational theory and discourse analysis. At the end of the volume, these theoretical approaches and the observations from each chapter form the basis of six theses on the evolution of policies and politics of the third sector.

The authors make an array of figures and data on the percentages of the third sector in employment, income, and shares of sub-sectors, as well as a detailed account of the agenda-setting/problem-definition stages, politics and policy issues, and bargaining and conflicts among bureaucratic agencies. Yet, given the importance of data and "hard" facts to support any policy decisions nowadays, it would have been helpful for the reader to find what the primary sources' criteria and information-gathering process looked like. As we know, "objective" measurements are affected by subjective criteria and this is also part of the politics and policy process, no matter how scientific and rigorous the numbers might seem. One also expects that going forward, as this branch of research develops, more quantitative evidence will become available, even if it is subject to the aforementioned caveat. The issue of the role of language and the overall image of the sector is also in need of deeper scrutiny; in particular, the impact of mass media, since they are critical in portraying social actors and identities in specific ways. Issues like the use of buzzwords, raised by Gidron and Bar in their chapter about the experience in Israel, are a key component in any critical understanding of the third sector and policy design in general.

Another issue with this text lies in the fact that the narrative is not equally fluid across the chapters. Here and there, one gets bogged down in too many facts and a very descriptive account that does not always allow space for more exhaustive analysis. The country context also follows different schemes, in part due to different emphases and problems in the history of the sector in each country. However, we need to determine what the relevant time horizon is when studying third sector and contemporary philanthropy phenomena. Some authors provide very long timelines, and while this sets the context to appreciate the evolution of the sector and its main values and social trends in the country, at times it makes the analysis lose focus. It is clear that in the last four decades there has been a shift of power among institutions, affecting *inter alia* the relative influence of the Church and family networks. There have always been mechanisms of solidarity that have operated separate from the market. What is interesting for research today are these third sector trends at a time when a generally agreed concept of citizenship and rights has arisen, and convergence to private sector standards is growing increasingly evident. A century ago, service provision was driven more by a benevolent, charitable sentiment; today, it is underpinned by a notion of civil society and a sense of legitimate social rights.

The identification of all the participants involved in the policy process is certainly a crucial part of the research in this book. That is why when it comes to social identities of beneficiaries or target populations of third sector organizations, the reader might feel there is something missing. Affirmative and collective action issues are critical in determining the creation and strength of civic organizations and non-profits. Over the years, specific population groups have come to the centre of policy concerns for diverse reasons (youth, women, disabled people, children, and so on). There is no clear mention of how the participation and representation of these particular groups have evolved in the countries under study. However, to be fair, most of the third sector work is oriented to basic social services (e.g., health care, basic education), as the authors show, particular groups probably come to a subsidiary place. Perhaps the case of Japan is an exception to this rule; Yamauchi and Kitora make clear that a great deal of third sector activity in recent years has been devoted to serving the senior population. We hope that future research will show how and to what extent the politics and policy spheres are shaped by the target population and minorities, rather than just the organizations in the sector.

The role of academics and their language cannot pass without comment. It is noteworthy, for example, that Kendall and Taylor, in the chapter about the English experience, talk about the "policy activist" instead of "policy entrepreneur" and think of the "agency and activism" in the third sector more like a "bricolage" than "entrepreneurship," so highlighting the collective aspect of the construction of the third sector, and somehow undermining the individual drive implicit in the notion of "entrepreneurship," used by most of the authors. As

this literature develops, there is no doubt we will get more material to carry out this self-critical task, which is also necessary to understand better these topics.

Despite these limitations, *Policy Initiatives Towards the Third Sector in International Perspective* is an important contribution to the literature. This book provides us with an international, contemporary perspective of the third sector, and constitutes an effort to elucidate some key trends both in the policy realm and the inner workings of the sector in each country and also from a cross-country standpoint. Yet, the editors point out that it only deals with "initiatives," since all the national processes under scrutiny are underway. As such, it sets the expectation to see the next developments so that we can confirm or qualify the assessment made so far and gain a deeper knowledge of the incorporation of the third sector into the policy process worldwide.

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Book Review

by Durdana Islam

Humanizing the Economy: Co-operatives in the Age of Capital. *By John Restakis.* Gabriola Island, BC: New Society Publishers. 2010. 288 pp. ISBN: 9780865716513.

Humanizing the Economy: Co-operatives in the Age of Capital is an interesting, insightful, and informative book that shows how cooperative models for economic and social development can create a more equitable, just, and humane future. The book is well written, persuasive, and consistent; and the author's claims are well supported by evidence from all over the world. *Humanizing the Economy* is a recommended reading for researchers, activists, practitioners, policymakers, and students across a wide range of disciplines who are interested in the reform of economics, globalization, and social justice. The author holds the reader's attention and interest from the beginning to the end of the book in a manner that is both intellectually stimulating and thought-provoking.

The author, John Restakis, is executive director of the British Columbia cooperative association and researches international cooperative economies. He based his book on his years of practical experience and in-depth knowledge about co-op movements, and speaks in favour of the cooperative philosophy as a way to build a more just and equitable society. He argues that cooperative movements are the most powerful grassroots movement in the world, with more than 800 million members in 85 countries.

With the ongoing global economic crisis and the world witnessing a capitalist free market economy on the verge of collapse, the timing of the book is significant. In the face of corporate capitalism's current failure to provide basic needs for billions of people all over the world, *Humanizing the Economy* explores the rich history of cooperatives as a possible alternative to capitalist economy.

Both capital-based free market economy and socialist-based command economy are commonly accepted as being mutually exclusive; that is, not to embrace one implies to follow the other. Restakis argues that this is a false dichotomy of limited choices. The book's primary theoretical contribution is the idea that a viable third alternative is democratically owned and managed cooperatives.

Humanizing the Economy describes the significant and essential role cooperative enterprises play in re-establishing aspects of social justice that have been overlooked and ignored through an over-reliance on a global capital economy. Restakis argues that our overall economic system has become detached from our

ecological, social, and cultural system. Moreover, the spread of this free market economy is undermining the morals of healthy societies, caring communities, and personal well-being. Consequently, this capitalist economic model has become an end to itself for not being able to serve people's moral and social needs. Therefore, the author encourages everyone to recognize the values of the rich and real economy that is visible in co-ops and community-based enterprises, where thousands of people are working together to build a more humane economy.

Restakis notes that the cooperative economic model is both time-tested and proven, and he illustrates this with success stories of cooperatives from all over the world. The book gives readers a clear picture of cooperatives' objectives and their applicability in embedding humane ingredients in an economic context. Restakis presents his arguments through persuasive grounded stories and examples drawn from almost every continent. From the worker cooperatives of Emilia Romagna to the recovered factories of Buenos Aires; from small tea farmers struggling to make a living in Sri Lanka to the fish consumer co-ops of Japan; and from the lonely nursing home rooms of small town in British Columbia to the brothels of Calcutta. Thus, people all over the world from different backgrounds, races, and cultures are shown implementing the co-op ideals to shed hopeful lights on human affairs and strive for a future that is worth living for.

As a complete work, *Humanizing the Economy* is very well written, jargon-free, and thought-provoking. The author's logical flow of arguments convinces the reader that ordinary people can take direct economic action to address their own needs by participating in cooperative movements. To reinforce the success stories of the cooperative movement, Restakis mixes history and ideas in an account that is personal, passionate, and informed. The cooperative principles emphasize rebuilding the social fabric of a community by healing and empowering marginalized people and their lives. Thus, the author advocates that community leaders could seek this proven and effective policy option as a way to build a more humane society.

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