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EDITORIAL / ÉDITORIAL

Building on the Foundation of Community Knowledge and Experience / Bâtir sur les fondements du savoir et de l'expérience communautaires

Jorge Sousa
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Welcome to the fall issue of the Canadian Journal of Nonprofit and Social Economy Research (ANSERJ). The theme of this issue is "Building on the Foundation of Community Knowledge and Experience." It was largely inspired by the passing of Jack Quarter, one of the founders of this journal, and represents our effort to honour his legacy. Rather than providing an in-memoriam piece, we recognize his legacy in two ways in this issue. First, we publish the keynote address Peter Hall delivered at the recent Association for Nonprofit and Social Economy Research (ANSER-ARES) conference. The keynote address was dedicated to Jack, and the issues discussed by Peter were of great importance to him. Second, we share his autobiography to kick off our new "Perspectives from the Field" section, which I will explain a bit more below.

The articles in this issue all touch on the topic of community knowledge in one form or another, a topic taken for granted as we continue to advance social economy and nonprofit research and theory. A key message conveyed by the theme is that as we look ahead to efforts aimed at producing new knowledge, our aim to give high regard to the foundations that have shaped our experiences and the research direction. The perspectives con-

Bienvenue au numéro d'automne de la Revue canadienne de recherche sur les OSBL et l'économie sociale (ANSERJ). Le thème de ce numéro est « Bâtir sur les fondements du savoir et de l'expérience communautaires ». Le décès de Jack Quarter, l'un des fondateurs de cette revue, a grandement inspiré ce thème, qui représente notre désir d'honorer sa mémoire. Dans ce numéro, plutôt que d'inclure une eulogie, nous voulons reconnaître Jack de deux façons particulières. D'abord, nous incluons le discours principal prononcé par Peter Hall lors de la plus récente conférence de l'Association de recherche sur les organismes sans but lucratif et de l'économie sociale (ANSER-ARES). Peter a dédié son discours à Jack, pour lequel les thèmes qui y sont soulevés étaient d'une grande importance. Deuxièmement, nous partageons son autobiographie avec vous pour lancer notre nouvelle rubrique, « Perspectives du terrain ». Je vais décrire celle-ci en un peu plus de détail ci-dessous.

Les articles dans ce numéro portent tous d'une manière ou d'une autre sur le savoir communautaire, un sujet que nous avons tendance à négliger dans nos efforts de faire avancer la recherche et la théorie sur les OSBL et l'économie sociale. Ce sujet comporte un message clé, à savoir que, pour que progressent les connaissances dans notre domaine, il est impératif de reconnaître la nature et la raison d'être de nos objectifs, ainsi que les fondations de nos expériences et de

veyed in this journal are a part of some form of social change activity, the focus of which is best identified by members of various communities, either individually or through community organizations.

This issue starts with four featured articles. The first is the keynote address by **Peter Hall**. In the second article, **David Buetti**, **Isabelle Bourgeois** and **Sébastien Savard** explore approaches to evaluating the capacity needs of community organizations in Québec. The third article, by **Jayne Malenfant**, **Naomi Nichols** and **Kaitlin Schwan**, is a presentation of the impact that research participants felt from working in a community. The final article, by **Geneviève Bonin-Labelle** and **Jean-Simon Demers**, explores how nonprofit or community radio stations are funded by sharing insights from a study that explores the financial statements of Canadian nonprofit stations.

One of the ongoing objectives of this journal is to ensure that it is a venue for voices from the field to share knowledge. While the articles to date have successfully demonstrated that commitment, there is more that we want to do. Part of our strategy is the introduction of a new section "Perspectives for the Field." The purpose of this section is to serve as a forum for issues and viewpoints to be shared by a greater diversity of voices from the field, including academics and practitioners. There is so much to learn from the ground—both inspiring and perplexing—so I want to encourage the use of this section as a space for healthy debate. The inaugural piece for this section is a unique contribution. We include **Jack Quarter's** autobiography, which was the last piece he wrote and offers important insights. The second piece is by **Laurie Mook**, who discusses some issues related to approaching impact measurement in the context of sustainable development goals. By reinforcing our foundations, these perspective pieces are a strong start for this new section.

As always, we hope you enjoy this issue of the journal. We believe that this collection of articles demonstrates the breadth and uniqueness of the writings that ANSERJ

notre savoir. En d'autres mots, il est impératif de nous assurer que notre recherche et nos perspectives contribuent d'une certaine manière à des activités vouées au changement social que les membres de diverses communautés, individuellement ou dans le cadre d'organismes communautaires, sont le plus à même d'identifier.

Ce numéro commence par quatre articles de fond. Le premier est le discours principal de Peter Hall. Dans le deuxième article, **David Buetti**, **Isabelle Bourgeois** et **Sébastien Savard** explorent diverses approches pour évaluer les besoins en capacité de production d'organismes communautaires au Québec. Le troisième article, par **Jayne Malenfant**, **Naomi Nichols** et **Kaitlin Schwan**, décrit l'impact ressenti par certains sujets de recherche lors de leur travail dans une communauté. Le dernier article, par **Geneviève Bonin-Labelle** et **Jean-Simon Demers**, partage les résultats d'une étude des états financiers de stations de radio communautaires ou sans but lucratif afin d'explorer comment celles-ci sont financées.

Cette revue s'engage sans relâche à encourager les individus travaillant sur le terrain à partager leurs acquis. Les divers articles publiés jusqu'à présent démontrent cet engagement, mais nous voulons en faire encore plus. Dans ce but, nous lançons une nouvelle rubrique, « Perspectives pour le terrain ». Celle-ci sera un espace pour le partage de sujets et de points de vue provenant d'une plus grande diversité de personnes travaillant sur le terrain, y compris des universitaires et des praticiens. On peut en apprendre tellement à partir de telles personnes—que ce soit des faits inspirants ou des faits intrigants—que je tiens à encourager l'utilisation de cette rubrique comme espace pour avoir des débats constructifs sur divers sujets. L'article inaugurant cette section est une contribution singulière. En effet, nous incluons l'autobiographie de **Jack Quarter**, le dernier texte de sa main, qui comporte des réflexions importantes. Dans le second texte, **Laurie Mook** traite de quelques questions relatives à l'étude des effets dans l'atteinte d'objectifs en développement durable. Ces deux textes, en renforçant nos fondations, marquent un excellent début pour notre nouvelle rubrique.

Comme toujours, nous espérons que vous aurez du plaisir à lire ce numéro. Nous croyons que cette collection d'articles démontre l'ampleur et la singularité des textes que cette revue

continues to publish. As we approach the new year, we are preparing to launch our new website and provide further opportunities for readers and contributors to engage with the journal in different ways. As we introduce changes to our website, we are driven by the need to strengthen engagement with our national and international communities, and to encourage newer scholars and practitioners to see ANSERJ as the venue for their work. We want to see more pieces that represent the broader field of our work.

Finally, if you have not done so already, please register on the site so you can receive updated information and announcements about the journal. We always welcome feedback and suggestions. We hope that you enjoy this issue of the journal.

ne cesse de publier. À l'approche du nouvel an, nous nous préparons à lancer notre nouveau site Web qui donnera à nos lecteurs et collaborateurs davantage d'occasions pour participer de diverses manières. En effet, en modifiant notre site, nous tenons à faciliter la participation de la part de nos communautés nationales et internationales et à encourager de nouveaux universitaires et praticiens à envisager notre revue comme un débouché de choix pour leurs écrits. Nous aimerions recevoir encore plus de textes représentant notre champ d'étude dans toute sa diversité.

Finalement, si vous ne l'avez pas déjà fait, veuillez vous inscrire sur notre site afin de recevoir des mises à jour occasionnelles de notre part. D'autre part, nous aimons toujours recevoir vos commentaires et suggestions. Et nous espérons que vous aimerez bien ce numéro.

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

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ABSTRACT

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

RÉSUMÉ

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

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

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INTRODUCTION

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

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

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

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

The academics and practitioners who participated in the social economy research partnerships made a massive contribution to knowledge and practice, and many, including Jack's former students, academic colleagues, and practitioner collaborators, are now playing leading roles in the sector. But just think how different Canada's social economy might be today if officials in the Regional Development Agencies had been required in the 2000s to get serious about the economy beyond small business, resource extraction, and physical infrastructure. I can recall a FedNor[2] official telling me in 2005 how much anxiety all the talk of "social capital" was creating, about how it would disrupt their "normal" activities. Or, imagine how different Canada's social economy might be if the staff of Community Futures had been freed then to advise, support, and fund the economic initiatives of nonprofit social enterprises and cooperatives. As we know, elections have consequences.

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

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

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

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

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

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

CONTEXTUAL AND ORGANIZATIONAL VARIETY

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

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

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

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

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

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

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

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

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

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

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

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

KNOWLEDGE PRODUCTION

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

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

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

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

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

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

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

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

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

PROFESSIONALISM IN THE SOCIAL ECONOMY

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

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

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

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

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

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

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

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

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

NOTES

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

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Modélisation des capacités organisationnelles en évaluation dans le secteur communautaire et implications pour le contexte québécois

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ABSTRACT

Few studies have conceptualized evaluation capacity for community organizations (COs), and even fewer in the specific context of COs in Québec. The objective of this article, therefore, is twofold: 1) to identify barriers to, and opportunities for, building evaluation capacity among OCs and 2) to verify the extent to which an existing conceptual framework of organizational evaluation capacity established by Isabelle Bourgeois and J. Bradley Cousins could be useful in its current form for understanding the evaluation capacity needs of COs in Québec. We first conducted a review of the scientific literature to identify the barriers and opportunities for evaluation capacity building in OCs, and analyzed the results of the literature review against the conceptual framework. Our results point to the fact that Bourgeois and Cousins' framework is appropriate for understanding the key factors influencing the capacity to do and to use evaluations among OCs. Additional efforts would, however, be necessary to improve the framework's compatibility with the practices and values of COs in Québec.

RÉSUMÉ

Les capacités en évaluation sont peu étudiées et encore moins conceptualisées en fonction du contexte particulier des organismes communautaires (OC) du Québec. Ainsi, l'objectif de cet article est double : 1) identifier chez les OC les barrières et les éléments qui facilitent le renforcement des capacités en évaluation et 2) vérifier dans quelle mesure un cadre conceptuel établi par Isabelle Bourgeois et J. Bradley Cousins pourrait s'avérer propice dans sa forme actuelle pour l'analyse des capacités en évaluation du milieu communautaire québécois. Nous avons d'abord identifié les barrières et les éléments qui facilitent le renforcement des capacités en évaluation des OC à partir d'une recherche documentaire d'articles scientifiques pertinents pour ensuite effectuer une analyse à partir du cadre conceptuel choisi. Nos résultats démontrent que le cadre conceptuel de Bourgeois et Cousins est pertinent pour répertorier les facteurs clés influençant la capacité à effectuer et à utiliser l'évaluation chez les OC. Des efforts supplémentaires seraient toutefois nécessaires pour améliorer la compatibilité du cadre conceptuel avec les pratiques et valeurs du milieu communautaire québécois.

Keywords / Mots clés Community organizations; Organizational evaluation capacity ; Evaluation capacity building; Program evaluation / Organismes communautaires; Capacités organisationnelles en évaluationRenforcement des capacités en évaluation; Évaluation des programmes

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Le Québec compte plus de 8 000 organismes communautaires (ci-après OC), la grande majorité étant liés au secteur de la santé et des services sociaux (Savard & Proulx, 2012). Étant enracinés dans les communautés desquelles ils émergent, les OC sont placés stratégiquement pour pouvoir agir en amont sur les besoins individuels et sociaux résultant la plupart du temps de conditions de vie injustes (Pierson, 2008). L'expression « organisme communautaire » se rapporte dans cet article aux organismes qui remplissent minimalement quatre critères proposés par la politique gouvernementale sur l'action communautaire au Québec : a) ils sont à but non lucratif; b) ils sont enracinés dans la communauté; c) ils entretiennent une vie associative et démocratique; d) ils sont libres de déterminer leur mission ainsi que leurs approches, pratiques, et orientations (Bourque, Grenier, Pelland, & St-Germain, 2006). Bien qu'a priori hétérogènes, les OC du Québec se définissent comme « les expressions d'un mouvement social autonome ayant comme objectif une mouvance collective dont l'action est orientée vers l'amélioration et la transformation sociale » (Zúñiga & Luly, 2005, p. 9). Les pratiques et interventions qu'ils mènent en société cherchent non seulement à répondre aux besoins immédiats des groupes dits marginalisés et vulnérables, mais aussi à les impliquer activement dans la recherche et la mise en place de solutions possibles.

Dans le but d'améliorer leurs impacts pour une plus grande justice sociale et la santé des populations, un nombre croissant d'organismes du milieu communautaire québécois souhaite avoir recours à l'évaluation (Service aux collectivités de l'UQAM, 2005). Tout en reconnaissant qu'aucune définition de l'évaluation ne fasse l'unanimité au sein de la communauté des évaluateurs (voir Poth, Lamarche, Yapp, Sulla & Chisamore, 2014), nous avons opté pour celle de la Société canadienne d'évaluation qui la décrit comme « l'appréciation systématique de la conception, de la mise en œuvre ou des résultats d'une initiative pour des fins d'apprentissage ou de prise de décision » (Société canadienne d'évaluation, en ligne). Dans les faits, plusieurs auteurs suggèrent que l'évaluation, tant par son processus que par sa finalité, peut avoir des effets positifs sur les OC, ce qui engendre des répercussions favorables sur les groupes qui les fréquentent. Parmi ces effets, notons : une meilleure compréhension des besoins de groupes minoritaires ou marginalisés (Larose et al., 2018); l'amélioration des activités ou des services en fonction des expériences vécues par les membres (Kelly, LaRose & Scharff, 2014; Weir & Fouche, 2016); le renforcement de la vie associative et démocratique par l'implication des membres dans les évaluations (Harper, Contreras, Bangi & Pedraza, 2003); une confiance accrue de la communauté envers la pertinence sociale de l'organisme (Andrews et al., 2005; Weir & Fouche, 2016); l'amélioration des compétences en recherche chez les parties prenantes (McKegg, Wehipeihana, & Pipi, 2016).

Depuis plus de dix ans à l'échelle tant nationale qu'internationale, praticiens et chercheurs en évaluation font alliance afin de développer des stratégies efficaces et efficientes ayant pour objectif le renforcement des capacités en évaluation (ci-après le RCÉ) (Preskill & Boyle, 2008). Le RCÉ se rapporte aux stratégies qui sont mises en place dans les organisations dans le but d'améliorer non seulement leur capacité à effectuer des évaluations de haute qualité, mais aussi à utiliser les résultats pour la prise de décision et l'amélioration continue de leurs pratiques (Stockdill, Baizerman & Compton, 2002). Diverses stratégies peuvent répondre à cette volonté des organisations d'améliorer leurs capacités en évaluation, y compris les formations et ateliers axés sur les connaissances et compétences en matière d'évaluation, le soutien technique ou méthodologique avant ou pendant les démarches évaluatives, et le développement de politiques, protocoles ou procédures pour assurer la pérennité des stratégies évaluatives (Stockdill, Baizerman & Compton, 2002). Il n'y a pas d'approche unique (« one size fits all ») pour renforcer les capacités en évaluation; en effet, les stratégies doivent être ajustées aux réalités et aux caractéristiques spécifiques des organisations. Dans cette optique, rendre compte des caractéristiques qui influencent les capacités en évaluation d'un milieu précis s'avère pertinent pour y développer des stratégies de RCÉ qui sont adaptées à sa situation particulière (Bourgeois & Cousins, 2013; Labin, Duffy, Meyers, Wandersman & Lesesne, 2012).

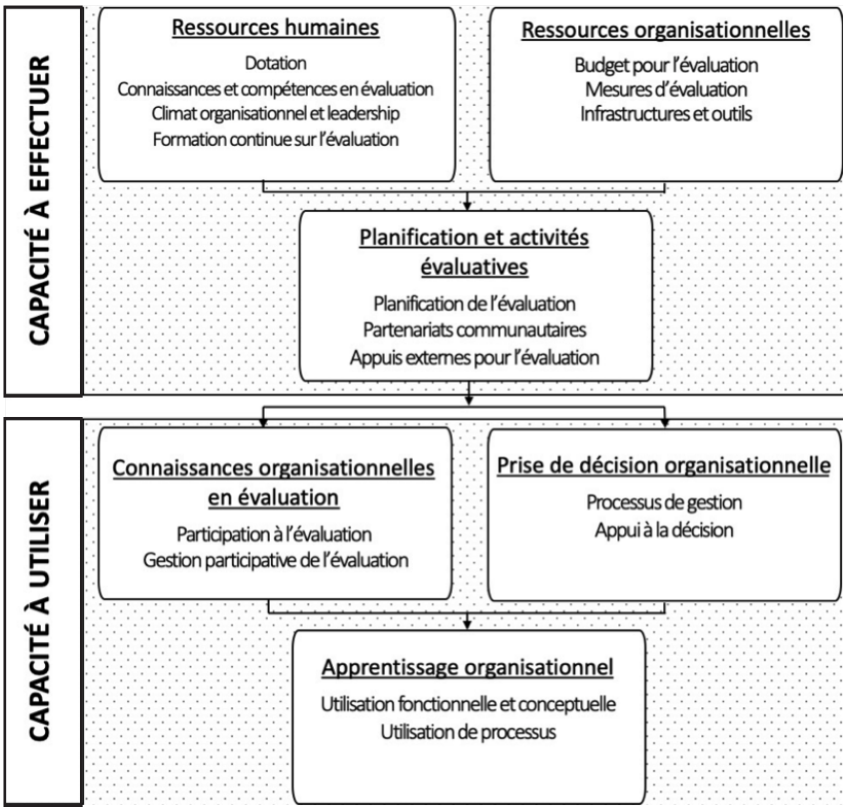
Pour l'instant, peu d'écrits documentent de manière systématique les caractéristiques organisationnelles qui interviennent sur le RCÉ des OC du Québec, sinon la littérature grise (Daniel, 1999; Fonds, 2012; Lemay, Leclair, Bélanger, & Messikh, 2013). Par exemple, dans son article paru dans le *Bulletin de la Société québécoise d'évaluation de programme*, Lemay et ses collaborateurs recensent des barrières organisationnelles qui influencent la production des évaluations dans les OC du Québec, telles que des ressources financières, matérielles et humaines limitées (2013). Un autre article indique que les évaluations peuvent susciter de la méfiance parmi les OC, surtout lorsque ce sont les bailleurs de fonds qui les exigent : « Dans le milieu communautaire, cette question [l'évaluation] éveille des sentiments ambigus où intérêt et méfiance se côtoient. Lorsque évoquée par un bailleur de fonds, l'évaluation inquiète et provoque toutes sortes de craintes » (Fonds, 2012, en ligne). Pour sa part, le Centre de formation populaire de Montréal indique que les OC tendent à considérer les démarches évaluatives comme étant une perte de temps : « Trop souvent, les évaluations sont considérées [par le milieu communautaire québécois] comme des moments peu importants, du temps perdu, des réunions ennuyantes » (1999, p. 1).

Pour pallier cette limite, l'objectif de cet article est double : d'une part, de repérer dans les écrits scientifiques les barrières et les éléments qui facilitent le RCÉ chez les OC et, d'autre part, de vérifier dans quelle mesure un cadre conceptuel existant, celui des capacités en évaluation de Bourgeois et Cousins (2013), est adéquat pour les étudier. Cette démarche constitue une étape importante pour l'adaptation possible du cadre conceptuel des capacités en évaluation au contexte particulier des OC au Québec.

CADRE CONCEPTUEL DES CAPACITÉS EN ÉVALUATION

Pour étudier les caractéristiques qui influencent les capacités en évaluation chez les OC, nous avons privilégié le cadre conceptuel des capacités en évaluation de Bourgeois et Cousins (2013). Ce choix est motivé par la visée pragmatique

Figure 1- Cadre conceptuel de Bourgeois et Cousins (2013)



du cadre qui met en évidence les éléments et caractéristiques organisationnelles témoignant concrètement de la capacité des organisations à effectuer et à utiliser les évaluations. Plus spécifiquement, l'opérationnalisation conceptuelle des capacités en évaluation que Bourgeois et Cousins nous proposent se décline en six composantes organisationnelles organisées selon deux capacités : celle à effectuer les évaluations et celle à les utiliser (voir la figure 1 ci-dessus).

Dans la partie supérieure de la figure, Bourgeois et Cousins (2013) exposent les trois premières composantes du cadre conceptuel. Celles-ci portent sur les capacités d'une organisation à effectuer des évaluations de haute qualité, une condition importante pour l'utilisation ultérieure des résultats. Ces composantes sont : 1) les ressources humaines; 2) les ressources organisationnelles; et 3) la planification des activités en matière d'évaluation. Ces trois premières composantes se rapportent respectivement à : 1) la disponibilité de ressources humaines en quantité suffisante avec les qualifications ou le potentiel pour réaliser des évaluations de haute qualité; 2) la suffisance de ressources financières, technologiques et matérielles pour mener à terme des évaluations de bonne qualité; et 3) la présence de structures décisionnelles (de procédures ou politiques, par exemple) qui favorisent et appuient la planification et la mise en œuvre d'activités évaluatives dans les organisations (Bourgeois et Cousins, 2013).

Dans la partie inférieure du modèle, les auteurs proposent trois composantes portant sur les capacités d'une organisation à utiliser les évaluations : 1) les connaissances organisationnelles en évaluation; 2) la prise de décision organisationnelle; et 3) l'apprentissage organisationnel. Ces trois dernières composantes se rapportent respectivement à : 1) l'implication des parties prenantes dans les démarches d'évaluation; 2) les structures décisionnelles qui facilitent l'intégration des résultats d'évaluation à la prise de décision; et 3) les avantages perçus par les parties prenantes à faire usage des évaluations. Chacune de ces six composantes comprend des sous-composantes décrites plus spécifiquement ailleurs (voir Bourgeois et Cousins, 2008, pp. 135–137, ou 2013, pp. 304–312) et répertoriées au tableau 1.

Tableau 1- Synthèse des sous-composantes du cadre de Bourgeois et Cousins (2013)

Capacité à effectuer l'évaluation		
Composantes	Sous-composantes	Définitions
1. Ressources humaines	1.1. Dotation	Disponibilité de ressources humaines en quantité adéquate pour réaliser des évaluations de qualité.
	1.2. Compétences techniques	Compétences de nature technique et méthodologique pour effectuer des évaluations de haute qualité dans les organisations.
	1.3. Compétences interpersonnelles	Compétences et habiletés de communication et d'animation des évaluateurs.
	1.4. Perfectionnement professionnel	Disponibilité d'activités de perfectionnement professionnel en matière d'évaluation.
	1.5. Leadership	Qualités de leadership des parties prenantes aux évaluations.
2. Ressources organisationnelles	2.1. Budget	Disponibilité de ressources financières dédiées à la réalisation des évaluations.
	2.2. Mesure de la performance	Présence de données évaluatives de qualité sur la performance des organisations à une fréquence régulière.
	2.3. Infrastructures et outils	Structures et outils de gouvernance qui soutiennent la réalisation des activités évaluatives dans un organisme.

Tableau 1- (continué)

Capacité à effectuer l'évaluation		
Composantes	Sous-composantes	Définitions
3. Planification et activités évaluatives	3.1. Planification	Activités réalisées dans le but de planifier l'évaluation dans les organisations.
	3.2. Évaluateurs internes et externes	Présence de spécialistes en évaluation qui œuvrent dans ou avec les organisations.
	3.3. Liens organisationnels	Occasions qu'ont des organisations de même type de tisser des liens entre elles pour accroître le partage des pratiques et expériences en évaluation.
	3.4. Appuis externes	Appuis externes dont disposent les organisations pour réaliser des évaluations.
Capacité à utiliser l'évaluation		
Composantes	Sous-composantes	Définitions
4. Connaissances organisationnelles en évaluation	4.1. Implication des parties prenantes	Niveau d'implication et d'engagement des parties prenantes aux démarches d'évaluation.
	4.2. Gestion axée sur les résultats	Adoption d'un mode de gestion axée sur les résultats (GAR) dans les organisations.
5. Prise de décision organisationnelle	5.1. Processus de gestion	Processus de gestion qui sont orchestrés par les organisations dans le but de s'assurer de l'utilisation des résultats d'évaluation pour la prise de décision.
	5.2. Appui à la décision	Niveau auquel les évaluations sont recherchées pour soutenir la prise de décision dans l'organisation.
6. Apprentissage organisationnel	6.1. Utilisation instrumentale, conceptuelle et processuelle	Utilisation de l'évaluation à des fins instrumentales (orienter la prise de décisions et l'amélioration des pratiques), conceptuelles (clarifier les mécanismes liant une intervention aux résultats) ou processuelles (augmenter les connaissances et compétences des individus au moyen de la démarche évaluative).

Développé à partir d'une étude empirique au sein de l'appareil gouvernemental fédéral, le cadre conceptuel de Bourgeois et Cousins s'est montré pertinent pour l'étude des capacités en évaluation de différentes organisations comme des unités de santé publique en Ontario (Bourgeois, Hotte, Simmons, Osseni, 2016; Bourgeois, Simmons & Buetti, 2018) ou un ministère du gouvernement du Québec (Bourgeois, Whynot et Thériault, 2015). Le cadre conceptuel des capacités en évaluation a aussi été utile pour comparer les composantes organisationnelles influençant les capacités en évaluation de trois organismes liés au domaine de la santé et des services sociaux au Québec et en Ontario (Bourgeois, Whynot et Thériault, 2015). Les auteurs de cette dernière étude notent toutefois que le cadre conceptuel des capacités en évaluation doit faire l'objet d'analyses plus poussées pour vérifier dans quelle mesure les composantes et les sous-composantes s'appliquent à un type d'organisation en particulier :

> Les résultats montrent qu'il existe des différences importantes entre les capacités à effectuer et à utiliser l'évaluation entre les trois types d'organisations. Bien que des constats communs émergent de l'analyse, les instruments de mesure et les modèles conceptuels qui portent sur les capacités en évaluation semblent plus

> efficaces lorsqu'ils sont adaptés aux réalités et au contexte précis des organisations issues d'un même secteur d'activité. (Bourgeois et al., 2015, pp. 54–55—traduction libre)

Ce constat justifie d'autant plus la pertinence d'évaluer dans quelle mesure le cadre de Bourgeois et Cousins pourrait s'avérer, dans sa forme actuelle, en adéquation avec les capacités en évaluation du milieu communautaire québécois.

MÉTHODES

Pour répondre aux objectifs qui ont été fixés au départ, à savoir : 1) repérer les barrières et les éléments qui facilitent le RCÉ des OC; et 2) vérifier dans quelle mesure le cadre conceptuel des capacités en évaluation de Bourgeois et Cousins permettrait de les organiser de manière logique, nous avons d'abord réalisé une recherche documentaire rigoureuse d'articles scientifiques pertinents en nous inspirant d'un protocole de revue systématique validé par les pairs (Kitchenham, 2004). La recherche documentaire est une méthode adéquate pour dresser un état des lieux des connaissances, ce qui cadre avec notre objectif de recherche qui est de repérer les caractéristiques organisationnelles qui interviennent sur le RCÉ des OC (Grant & Booth, 2009).

Avec l'aide d'une bibliothécaire spécialisée en sciences sociales, nous avons isolé les mots clés et les concepts centraux de notre objectif de recherche (capacité en évaluation, renforcement des capacités en évaluation, évaluation de programmes, barrières et éléments facilitants et organismes communautaires) de même que leurs équivalents en anglais. Par la suite, la recherche documentaire a été entreprise en la restreignant aux articles révisés par les pairs rédigés en français ou en anglais et publiés à partir de 2005. Quatre bases de données (Web of Science, Social Work Abstracts, PsycINFO, Érudit) et six revues scientifiques (*American Journal of Evaluation, Revue canadienne d'évaluation de programmes, Evaluation and Program Planning, Evaluation Review, Revue canadienne de recherche sur les OBSL et l'économie sociale, Nonprofit and Voluntary Sector Quarterly*) ont été interrogées. Les bases de données et les revues scientifiques ont été délibérément sélectionnées à partir de disciplines différentes (travail social, éducation, psychologie, etc.) ou domaines d'étude (évaluation de programme, développement communautaire, etc.) afin de favoriser la perspective multidisciplinaire du RCÉ en milieu communautaire.

Pour être inclus dans l'analyse, les articles devaient aborder un contenu pertinent et original sur les capacités en évaluation des OC, soit par une démarche empirique (c'est-à-dire des recherches qualitatives, quantitatives ou mixtes) ou par un récit de pratique (c'est-à-dire des leçons apprises suite au développement ou à l'implantation d'une stratégie de RCÉ dans un OC). Afin de respecter le plus fidèlement possible le contexte organisationnel des OC de la province, nous avons exclu de notre analyse les articles dont les organisations participantes étaient : 1) à but lucratif; 2) administrées par un établissement du réseau public; 3) situées dans un pays en voie de développement (Bourque et al., 2006).

La recherche documentaire a initialement mené à 3 146 résultats, lesquels ont été réduits à 412 par simple lecture du titre. Les résumés des 412 publications ont ensuite été scrutés en fonction de nos critères d'inclusion et d'exclusion, ce qui a permis de réduire le résultat de notre recherche à 59. Une fois les doublons retirés, les 52 publications restantes ont été lues intégralement pour vérifier qu'elles cadraient avec nos critères de sélection et qu'elles étaient d'une qualité scientifique acceptable (Kitchenham, 2004). Nous avons enfin extrait des publications retenues (n = 22) les éléments et facteurs influençant la planification, la mise en œuvre ou la pérennité de stratégies de RCÉ chez les OC. Ces derniers ont été analysés par une méthode déductive éclairée par les composantes et sous-composantes du cadre conceptuel de Bourgeois et Cousins.

RÉSULTATS

Caractéristiques des publications

La totalité des articles analysés était en anglais et la majorité a été réalisée aux États-Unis (*n* = 14). Les autres articles provenaient du Canada (*n* = 5), de l'Australie (*n* = 2) et de l'Europe (*n* = 1). Parmi ceux réalisés au Canada, un seul article portait spécifiquement sur les capacités en évaluation d'un OC du Québec (Bourgeois, Whynot & Theriault, 2015), ce qui justifie d'autant plus l'intérêt que nous portons aux capacités en évaluation des OC de la province. Sur le plan méthodologique, plus de la moitié des auteurs (*n* = 12) ont recouru à des méthodes qualitatives, notamment des études de cas ou des récits de pratiques. Cinq autres articles ont fait usage de méthodes strictement quantitatives, soit la même proportion pour les méthodes mixtes (*n* = 5). À l'exception de Yu et McLaughlin (2013), le contenu des articles portait principalement sur les caractéristiques organisationnelles associées aux capacités à effectuer des évaluations de qualité plutôt qu'à celles associées à leur utilisation pour la prise de décision. Le tableau 2 placé en annexe de cet article présente une brève description de chacun des 22 articles retenus pour l'analyse : objectif, lieu, méthodes, barrières et éléments qui facilitent le RCÉ chez les OC.

CARACTÉRISTIQUES ORGANISATIONNELLES QUI INFLUENCENT LE RCÉ CHEZ LES OC

Cette section présente les barrières et les éléments qui facilitent le RCÉ du milieu communautaire. Les résultats sont organisés en fonction des composantes et sous-composantes du cadre conceptuel développé par Bourgeois et Cousins (2013).

CAPACITÉ À EFFECTUER DES ÉVALUATIONS

Composante 1 : Ressources humaines

Dotation

Un nombre suffisant de salariés pour répondre de manière convenable aux besoins d'une mission particulière, de même qu'un faible taux de roulement des salariés, sont des caractéristiques associées positivement à la capacité à effectuer des évaluations de haute qualité dans les OC (Akintobi et al., 2012; Yung, 2008). Certains auteurs remarquent une situation très différente parmi les OC, soit un nombre insuffisant de salariés pour répondre adéquatement aux besoins en lien avec la mission ainsi qu'un taux de roulement élevé parmi les salariés (Akintobi et al., 2012; Kegeles, Rebchook, & Tebbetts, 2005, Yung, 2008). Dans leur étude qualitative, Kegeles, Rebchook et Tebbetts (2005) montrent que la précarité des conditions de travail et l'épuisement des salariés sont perçus par les participants comme d'importantes barrières au RCÉ dans les OC.

Compétences techniques

En raison de connaissances limitées en matière d'évaluation, les OC rencontrent souvent des difficultés techniques ou méthodologiques lorsqu'ils effectuent les activités suivantes : l'opérationnalisation des services offerts sous la forme d'un modèle logique (Adams, Nnawulezi, et Vandenberg, 2015); la définition et la priorisation de questions d'évaluation (Carman & Fredericks, 2010); la sélection et la conception de méthodes d'évaluation (Carman, 2007; Myers, et Austin, 2014); l'établissement d'indicateurs et de seuils de réussites (Carman, 2007; Carman & Fredericks, 2010); la gestion et l'analyse de données (Carnochan, Samples, Myers, et Austin, 2014). Lorsqu'elles ne sont pas ciblées par des formations appropriées ou un soutien adéquat, ces difficultés techniques et méthodologiques peuvent avoir un effet négatif sur la qualité des évaluations réalisées et l'utilisation ultérieure des résultats (Carman, 2007; Carman & Fredericks, 2010). Pour contrer ces barrières au niveau des compétences techniques, l'accès à un soutien méthodologique ou technique pendant la réalisation des évaluations est associée positivement au RCÉ des OC (Adams et al., 2015; Garcia-Iriarte et al., 2011). Des ressources documentaires (articles scientifiques, guides de pratique en ligne, etc.) qui portent sur les aspects méthodologiques ou techniques de l'évaluation peuvent contribuer au RCÉ des OC, surtout lorsqu'elles sont simples, accessibles et gratuites (Carman, 2007; Janzen et al., 2017).

Compétences interpersonnelles

Un climat de confiance contribue au partage d'informations concernant les activités et services, ce qui constitue un élément important pour la qualité des données recueillies lors des évaluations (Mayne, 2017). L'évaluation est plus susceptible de donner lieu à des conflits à l'interne lorsque son apport pour l'amélioration des pratiques est contesté ou incompris par les parties prenantes (Bourgeois et al., 2015; Schwandt & Dahler-Larsen, 2006). Les individus qui ne perçoivent pas la pertinence de l'évaluation pour l'avancement des pratiques seront plus résistants à sa réalisation et à son utilisation (Bourgeois et al., 2015; Mayne, 2017). Une vision partagée et négociée de l'évaluation entre les parties prenantes ainsi que la mise en place de règles de procédure avant les évaluations sont des éléments qui favoriseraient un climat organisationnel propice à la réalisation d'évaluations dans les OC (Adams et al., 2015; Mayne, 2017; Schwandt & Dahler-Larsen, 2006).

Perfectionnement professionnel

Des activités destinées à favoriser les compétences de gestion et de leadership peuvent influencer favorablement la réalisation des évaluations dans les OC (Kapucu, Healy, & Arslan, 2011; Sobeck, 2008). Sobeck (2008) montre que les OC qui participent ponctuellement à des activités pour améliorer les compétences en gestion de projet sont plus susceptibles de réaliser des évaluations que ceux qui n'y participent pas. Selon Despard (2016), les activités de perfectionnement professionnel doivent répondre en priorité aux besoins de formation des acteurs impliqués dans les évaluations (les coordonnateurs et les personnes responsables de l'évaluation, par exemple). L'offre d'activités de perfectionnement professionnel peut ensuite s'étendre aux autres membres et salariés (Despard, 2016). Considérant que le coût des activités de perfectionnement professionnel est un facteur important sur le niveau de participation des OC, Carnochan et ses collègues (2014) suggèrent de les adapter en fonction des capacités financières des organismes participants. Lorsqu'elles s'échelonnent sur plusieurs mois, les activités de perfectionnement professionnel qui sont combinées à un soutien technologique ou méthodologique sont associées significativement au RCÉ des OC nouvellement formés ou de petite taille (Despard, 2016).

Leadership

Puisque les coordonnateurs sont responsables de la gestion quotidienne des dossiers de l'organisation, leur engagement dans l'évaluation est un facteur clé pour assurer le succès du RCÉ des OC (Andrews, Motes, Floyd, Flerx, & Lopez-De Fede, 2008; Alaimo, 2008; Cheverton, 2007). Par comparaison au secteur public, les coordonnateurs sont particulièrement influents sur l'offre et la demande en évaluation dans les OC. Les efforts et les ressources que déploieront les coordonnateurs afin de mobiliser, stimuler et soutenir les membres et les salariés pour les activités en matière d'évaluation sont étroitement liés aux avantages qu'ils associent à l'utilisation de l'évaluation dans leurs organisations respectives (Alaimo, 2008; Cousins, Goh, Elliott, Aubry, & Gilbert, 2014). Par exemple, Alaimo (2008) signale, dans une étude qualitative de 42 coordonnateurs d'OC, que les participants qui décrivaient l'évaluation comme étant un investissement pour améliorer les activités et stimuler la vie associative (29 % de l'échantillon) étaient plus enclins que les autres à la promouvoir et à l'encourager à l'interne. A contrario, les participants qui la décrivaient surtout comme une modalité de reddition de compte étaient moins disposés à utiliser l'évaluation dans leurs organisations (Alaimo, 2008). Le conseil d'administration (CA) est également une entité importante pour stimuler et encourager la production d'évaluations dans les OC, notamment en raison de son influence sur les politiques, priorités stratégiques et affectation des ressources (Cheverton, 2007). À cette fin, la nomination ou la présence sur le CA d'une personne qui a des compétences et de l'expérience en évaluation est un élément clé facilitant le RCÉ dans les OC (Carman & Fredericks, 2010).

Composante 2 : Ressources organisationnelles

Budget

Les chercheurs sont unanimes sur le fait que les ressources financières influencent fortement le RCÉ dans les OC.

Alaimo (2008) montre que la presque totalité (88 %) des OC (*n* = 44) rapportait que les évaluations étaient financées directement par l'entremise du budget opérationnel. Carman & Fredericks (2010) ajoutent que de faibles capacités en évaluation sont, la plupart du temps, reliées à l'insuffisance de ressources humaines et matérielles elle-même perpétuée par des ressources financières limitées :

> L'évaluation n'était qu'un seul des nombreux défis auxquels les organismes communautaires sont confrontés : l'absence de pratiques évaluatives était le symptôme d'un dysfonctionnement organisationnel plus sérieux, comme le maintien d'un niveau de dotation en effectifs suffisant avec très peu de ressources financières. (Carman & Fredericks, 2010, p. 97—traduction libre)

Ainsi, les OC en situation précaire sont plus susceptibles d'allouer les ressources financières à la mise en œuvre d'activités et de services qu'à l'évaluation des résultats (Alaimo, 2008; Carman & Fredericks, 2010; Kegeles et al., 2005).

Mesure de la performance

Des chercheurs montrent que les OC recueillent généralement très peu de données qui leur permettraient d'analyser la performance et l'impact de leurs services à court, moyen et long terme (Akintobi et al., 2012; Carman, 2007; Kegeles et al., 2005). Dans une étude quantitative réalisée auprès de 178 OC, Carmen (2008) indique qu'une mince proportion seulement (17 %) avait opérationnalisé les retombées prévues par les activités sous la forme de modèles logiques. Carman (2007) montre en outre que les données recueillies et analysées par les organisations participantes à des fins d'évaluation étaient surtout limitées aux intrants (soit des ressources déployées pour les activités et les services) ainsi qu'aux extrants (soit les produits directs des activités réalisées par les salariés et bénévoles). Bien que les intrants et extrants constituent généralement des données adéquates pour répondre aux obligations en matière de reddition de comptes, elles ne sont pas suffisantes pour mesurer la performance et les retombées des activités et des services (Akintobi et al., 2012; Carman & Fredericks, 2010; Yu & Arthur McLaughlin, 2013). Des formations, des outils et du soutien lors de la collecte et l'analyse des données peuvent contribuer à l'amélioration du système de mesure du rendement dans les OC (Akintobi et al., 2012). Des guides de pratiques en matière d'évaluation peuvent aussi appuyer la réalisation d'évaluations dans les OC (Adams et al., 2015).

Les infrastructures technologiques influencent également la qualité de la mesure de la performance dans les OC (Carman & Fredericks, 2010; Yung et al., 2008). Ces infrastructures comprennent les installations et équipements nécessitant l'emploi de technologies dans la réalisation des évaluations; elles peuvent inclure, par exemple, les ordinateurs portables et tablettes tactiles[1], les bases de données scientifiques, et les logiciels de traitement de texte ou d'analyse de données (Carman, 2007; Carman & Fredericks, 2010; Yung et al., 2008). Lorsqu'elles sont en quantité suffisante et d'une qualité adéquate, les infrastructures technologiques encouragent le RCÉ puisqu'elles facilitent l'organisation et l'analyse des données (Carman & Fredericks, 2010). Par exemple, les données recueillies électroniquement nécessitent moins de manipulation pour être centralisées dans un système informatique que celles recueillies depuis des formulaires sur papier (Carman, 2007). Malgré cela, 97 % des participants à l'étude de Carman (2007) rapportaient faire usage de formulaires sur papier pour consigner leurs statistiques et leurs notes se rapportant aux interventions (Carman, 2007). Pour Andrews et al. (2008), l'insuffisance d'infrastructures technologiques pour l'évaluation n'est guère surprenante, vu les capacités financières limitées des OC :

> Les organismes communautaires n'ont que très peu de ressources financières à investir dans les infrastructures technologiques. Cela a pour conséquence d'altérer l'ensemble du processus évaluatif, comme la collecte et la gestion des données, les communications entre les membres et les salariés, etc. (Andrews et al., 2008, p. 95—traduction libre)

Infrastructures et outils

La présence d'une politique organisationnelle en évaluation est un élément qui favorise le RCÉ dans les OC, surtout lorsqu'elle est liée à des processus de gouvernance (Alaimo, 2008; Carman & Fredericks, 2010). Par exemple, Carman et Fredericks (2010) montrent que dans certains OC, les évaluations sont reliées à la planification stratégique annuelle et orientent les décisions concernant le plan d'action, le budget et l'affectation des ressources. La présence d'une politique organisationnelle peut mitiger les effets négatifs d'un haut roulement des salariés sur la pérennité de l'évaluation (Alaimo, 2008). À l'inverse, lorsque l'évaluation n'est pas entérinée par une politique ou qu'elle n'est pas liée à un processus de gouvernance (par exemple, une planification stratégique annuelle), les évaluations relèvent de la seule volonté des membres à les réaliser (Alaimo, 2008; Carnochan et al., 2014). Un cadre de référence sur l'évaluation qui est conjointement conçu et mutuellement accepté par les parties prenantes est aussi un élément qui favorise le RCÉ dans les OC (Adams et al., 2015; Schalock et al., 2014). Le cadre de référence devrait comporter les rôles et les responsabilités de chacun des membres du comité d'évaluation, décrire la vision et la fonction de l'évaluation dans l'organisation et préciser les échéanciers des activités et services à évaluer.

Composante 3 : Planification et activités évaluatives

Planification

Certains auteurs montrent que la présence d'un comité formellement mandaté pour l'évaluation contribue favorablement au RCÉ dans les OC (Adams et al., 2015; Schalock et al., 2014). Pour un plus grand impact sur le RCÉ, le comité d'évaluation devrait au minimum impliquer les parties prenantes de l'organisme : coordonnateurs, membres du CA, salariés, bénévoles (Schalock et al., 2014). Le niveau d'implication des membres au comité d'évaluation est influencé par la disponibilité de ressources humaines intéressées et compétentes en matière d'évaluation (Schalock et al., 2014).

Évaluateurs internes et externes

L'embauche de consultants compétents et expérimentés peut s'avérer utile afin de compléter, lorsque nécessaire, les capacités en évaluation des OC (Preskill & Boyle, 2008; Yung et al., 2008). Les consultants spécialisés dans le RCÉ utilisent des stratégies adaptées aux besoins des OC en matière d'évaluation : conceptualisation de modèles logiques, soutien méthodologique ou technique, etc. (Adams et al., 2015; Akintobi et al., 2012; Simmons et al., 2015). En fonction des besoins identifiés, le soutien consultatif peut s'échelonner sur plusieurs mois avant d'être pleinement effectif sur les capacités en évaluation des OC (Despard, 2016). Bien sûr, la capacité à embaucher de tels consultants est étroitement liée aux ressources humaines et financières des OC (Despard, 2016; Preskill & Boyle, 2008; Yung, 2008).

Liens organisationnels

Deux études suggèrent que des rencontres structurées et à faible coût pour favoriser les échanges d'expériences et de pratiques d'évaluation entre les OC (par exemple, une communauté de pratique) ont un effet positif sur le RCÉ des OC (Andrews et al., 2008; Janzen et al., 2017). Ces rencontres peuvent augmenter les connaissances et les compétences des participants en matière d'évaluation, en plus de susciter un engouement des organisations pour l'évaluation (Andrews et al., 2008; Janzen et al., 2017).

Appuis externes

L'analyse des articles montre que des partenariats solides et durables entre les universités et les OC peuvent constituer un débouché intéressant pour le RCÉ :

> Au fur et à mesure que notre partenariat [entre une université et un OC] s'est solidifié, les salariés de l'organisme communautaire semblaient acquérir une vision intégrée de l'évaluation—non seulement de sa finalité, mais aussi de l'ensemble de son processus. (Garcia-Iriarte et al., 2011, p. 177—traduction libre)

Les partenariats entre les universités et les OC offrent une alternative peu coûteuse aux consultants (Garcia-Iriarte et al., 2011). Il est préférable que les partenariats entre les universités et les parties prenantes des évaluations mettent l'accent sur une collaboration qui soit interactive et participative (Janzen et al., 2017). À l'inverse, les appuis externes qui adoptent des approches prescriptives lors du RCÉ des OC peuvent diminuer l'intérêt des participants pour l'évaluation ou même compromettre la pérennité du partenariat (Cheverton, 2007; Janzen et al., 2017). Les OC qui sont situés à l'extérieur de centres urbains ont généralement moins accès aux appuis externes en matière d'évaluation, ce qui constitue un élément problématique pour le RCÉ (Simmons et al., 2015). Des guides de pratiques en matière d'évaluation peuvent aussi contribuer à la réalisation d'évaluations dans les OC (Adams et al., 2015).

CAPACITÉ À UTILISER LES ÉVALUATIONS

Composante 4 : Connaissances organisationnelles en évaluation

Implication des parties prenantes

Pour augmenter l'utilisation des résultats d'évaluation par les parties prenantes, les évaluations gagneraient à être réalisées selon une démarche participative (Alaimo, 2008; Cheverton, 2007). La démarche participative vise à favoriser la participation des acteurs concernés par l'évaluation dans l'ensemble du processus d'évaluation. Selon plusieurs auteurs, les coordonnateurs et le CA sont parmi les plus susceptibles d'utiliser les résultats d'évaluations et, par conséquent, devraient être pleinement engagés dans les évaluations (Alaimo, 2008; Cousins et al., 2014). Les bénévoles, les salariés et les personnes qui fréquentent l'organisme devraient aussi, dans la plus grande mesure du possible, être impliqués dans les évaluations pour favoriser une culture évaluatrice dans les OC (Garcia-Iriarte et al., 2011; Kegeles et al., 2005). Garcia-Iriarte et ses collaborateurs (2011) décrivent l'expérience d'une salariée qui, avec le soutien de son coordonnateur et d'une équipe universitaire spécialisée en évaluation, a contribué positivement à la planification, la mise en œuvre et la diffusion d'une évaluation dans un OC. Par exemple, cette salariée a formulé des hypothèses originales à partir de ses expériences dans les activités évaluées pour montrer que certains résultats étaient contradictoires. À l'inverse, les acteurs qui ne sont pas sollicités au cours de la planification des évaluations risquent de les percevoir comme une charge supplémentaire, ce qui peut compromettre la qualité des données qu'ils recueilleront pendant celles-ci (Carnochan et al., 2014; Kegeles et al., 2005). Il en va de même pour les parties prenantes qui ne perçoivent pas l'évaluation comme une démarche efficace pour améliorer les activités ou services des OC (Alaimo, 2008; Carman & Fredericks, 2010; Cheverton, 2007). L'implication des parties prenantes peut aussi être limitée par certaines priorités qui font concurrence à l'évaluation (par exemple, participer à la recherche de financement) (Alaimo, 2008). Cousins et ses collaborateurs (2014) montrent d'ailleurs que le temps consacré pour l'évaluation est trois fois moindre dans le secteur communautaire que dans le secteur public.

Gestion axée sur les résultats

La gestion axée sur les résultats (GAR) est une approche qui cherche à rencontrer les résultats attendus des activités ou des services offerts par les organisations (Bourgeois et Cousins, 2013). Les coordonnateurs qui adoptent des stratégies de gestion qui s'inspirent de la GAR sont plus susceptibles de faire usage des évaluations pour la prise de décision (Alaimo, 2008; Mayne, 2017). Alaimo (2008) montre que les coordonnateurs qui privilégiaient un style de gestion qui s'apparente à la GAR étaient plus nombreux que les autres à décrire l'évaluation comme un investissement (plutôt qu'une dépense) pour améliorer les retombées de leur organisme sur les communautés. Houlbrook (2011) indique cependant que les acteurs communautaires qui participaient à son étude étaient généralement réticents devant la GAR. Selon eux, l'adoption unilatérale de la GAR dans les OC mènerait les bailleurs de fonds à les comparer et à juger de leur efficacité uniquement sur la base de certains résultats qu'ils auraient déterminés. Pour Houlbrook (2011), les outils et les stratégies issus de la GAR ne devraient pas être imposés aux OC. Plutôt, l'auteur suggère de présenter les pratiques, les stratégies et les outils de la GAR aux OC qui jugeront des plus pertinents et les adapteront en fonction de leur culture organisationnelle.

Composante 5 : Prise de décision organisationnelle

Processus de gestion

Alaimo (2008) montre que certains OC prévoient systématiquement dans leur budget opérationnel les coûts associés aux évaluations de nouvelles activités ou de nouveaux services. La mise en place de processus de gestion qui favorisent l'utilisation de l'évaluation, selon Alaimo (2008), est étroitement liée à la demande pour l'évaluation. La demande pour l'évaluation dépend de nombreux facteurs, y compris l'implication des parties prenantes aux évaluations et la suffisance de ressources humaines et financières (Alaimo, 2008; Andrews et al., 2008).

Appui à la décision

Comparativement au secteur public, les membres de la coordination et du CA assument généralement la responsabilité pour l'offre et la demande en évaluation dans les OC (Cousins et al., 2014). L'implication active des parties prenantes aux évaluations, une sous-composante déjà couverte dans le présent article, est un facteur clé pour assurer que les résultats reflètent les décisions (Andrews et al., 2008; Janzen et al., 2017). Janzen et ses collaborateurs (2017) ajoutent que, pour maximiser l'appui à la décision, la présentation des résultats doit être adaptée au niveau de connaissance et d'alphabétisme des parties prenantes (présentations, groupes de discussion, bulletins informatifs, affiches, etc.).

Composante 6 : Apprentissage organisationnel

Utilisation conceptuelle, instrumentale et processuelle

Les acteurs qui ont accès à des formations qui visent à distinguer les types d'utilisations de l'évaluation seront plus enclins à les apprécier dans leur OC, ce qui peut contribuer positivement au RCÉ (Bourgeois et Cousins, 2013). Par exemple, une année après avoir participé à un programme de RCÉ, la majorité des OC participantes ont indiqué qu'elles continuaient d'utiliser les évaluations pour : mieux saisir l'expérience des personnes qui fréquentent les activités et services (usage conceptuel); apporter des modifications à la programmation (usage instrumental); et améliorer leurs compétences en évaluation (usage processuel) (Adams et al., 2015).

D'autres chercheurs ont remarqué que les évaluations peuvent être déployées par les OC à des fins politiques ou de revendication. À ce sujet, Carman et Fredericks (2010) rapportent des cas où les OC présentaient systématiquement leurs rapports d'évaluation aux bailleurs de fonds afin de sensibiliser ces derniers aux réalités des populations que défendaient les OC et pour demander davantage de ressources. L'implication des parties prenantes aux évaluations est un facteur essentiel pour favoriser l'apprentissage organisationnel dans les OC (Carman et Fredericks, 2010; Janzen et al., 2017). Par la participation active des coordonnateurs, du CA et des autres acteurs communautaires au RCÉ, ces derniers seront plus enclins à percevoir les avantages associés à l'utilisation des évaluations (Janzen et al., 2017).

DISCUSSION ET CONCLUSION

Cet article avait pour but de : 1) repérer, par une recherche documentaire structurée de la littérature scientifique, les barrières et les éléments qui facilitent le RCÉ des OC; et 2) vérifier dans quelle mesure le cadre de Bourgeois et Cousins (2013) constitue, dans sa forme actuelle, un cadre analytique propice à une lecture des capacités en évaluations des OC. Pour répondre à ces objectifs, une recherche documentaire a d'abord été réalisée afin de trouver les éléments qui influencent les capacités en évaluation pour ensuite les analyser en fonction des composantes et des sous-composantes organisationnelles associées à la capacité à effectuer et à utiliser les évaluations.

L'analyse met en évidence que les capacités en évaluation des OC sont influencées par un nombre important de caractéristiques organisationnelles telles que la disponibilité de ressources humaines formées en évaluation, les ressources financières attribuées à la réalisation des évaluations, et les procédures et politiques qui encadrent la pratique évaluative au sein des organismes (Kegeles et al., 2005; Labin et al., 2012). Des barrières récurrentes et interreliées semblent

également avoir un impact négatif sur les capacités en évaluation des OC, notamment un budget opérationnel très limité pour l'évaluation, de faibles connaissances et compétences en matière d'évaluation et un faible soutien méthodologique ou technique lors des évaluations (Andrews et al., 2008). Compte tenu des ressources limitées et des nombreuses priorités autres que l'évaluation dans les OC, les stratégies de RCÉ développées devront être peu coûteuses, s'intégrer facilement au quotidien des salariés et s'appuyer sur les capacités actuelles des organisations en matière d'évaluation (Carman & Kegeles et al., 2005; Schalock et al., 2014). Ce constat est particulièrement vrai pour les OC du Québec, car ils sont parmi les moins bien pourvus en ressources humaines, matérielles et financières par rapport au reste du Canada (Rowe, 2006).

Qui plus est, la présente analyse porte à croire que les études surreprésentent le rôle des caractéristiques organisationnelles sur les capacités en évaluation des OC (Cheverton, 2007; Houlbrook, 2011). Pour Cheverton (2007), bon nombre d'articles, en évacuant les influences et facteurs contextuels de l'étude des capacités en évaluation des OC, tendent à les dépeindre comme des organisations dysfonctionnelles au leadership défaillant. Pourtant, les individus, tout comme les organisations, gravitent dans des systèmes qui influencent les capacités d'agir (Burke, 2014). Les bailleurs de fonds, par les ressources qu'ils attribuent ou non, ont un rôle important à jouer pour le RCÉ des OC, mais jusqu'ici il est peu discuté dans les écrits. C'est en recadrant l'étude des capacités en évaluation dans son contexte social et politique que les chercheurs et les praticiens pourront proposer des stratégies innovatrices à l'ensemble des acteurs qui jouent des rôles et ont des responsabilités par rapport au RCÉ des OC du Québec (Burke, 2014).

Pour sa part, le cadre conceptuel de Bourgeois et Cousins (2013) s'est montré tout à fait adéquat pour organiser et documenter les barrières et les éléments qui facilitent les capacités en évaluation des OC qui ont été repérés dans les écrits scientifiques analysés. En effet, les six composantes du cadre conceptuel ont été utilisées pour rendre compte avec justesse des facteurs et des caractéristiques qui influencent les capacités à effectuer et à utiliser l'évaluation du milieu communautaire. Précisons toutefois que l'analyse s'est fondée sur un nombre important de publications canadiennes et américaines, ce qui laisse croire que le contexte et la réalité particulière des OC du Québec pourraient influencer l'incidence des éléments constatés dans la littérature analysée ou même favoriser l'existence d'autres facteurs. Notons à cet effet que la philosophie d'action qui anime le milieu communautaire de la province est unique en son genre, notamment parce qu'elle n'est pas seulement orientée, comme c'est plus souvent le cas dans le reste du Canada et aux États-Unis, vers la prestation de services complémentaires à ceux de l'État (Jetté, 2011, Zúñiga & Luly, 2005). Tel que mentionné dans l'introduction, le milieu communautaire québécois aspire davantage à favoriser un changement social positif par un mouvement autonome et parallèle aux services publics (Jetté, 2011). Puisque le cadre conceptuel a été développé à partir d'une étude empirique au sein de l'appareil gouvernemental fédéral, on peut se demander dans quelle mesure certaines des sous-composantes trouvent une juste correspondance avec les valeurs et pratiques du milieu communautaire québécois. À ce sujet, certains auteurs indiquent que le milieu communautaire québécois est généralement réticent devant les approches issues de la nouvelle gestion publique : « Ce modèle de gestion pose problème pour les organismes communautaires, car il institue une logique entrepreneuriale et présente les pratiques qui en découlent comme étant nécessairement supérieures à celles élaborées par les milieux communautaires » (Depelteau, 2013, p. 33). Considérant cela, dans quelle mesure l'approche axée sur les résultats, elle-même issue de la nouvelle gestion publique, trouvera-t-elle un écho favorable auprès des différents acteurs des OC québécois?

Il en va de même pour certaines des étiquettes attribuées aux composantes et aux sous-composantes du cadre conceptuel. Par exemple, l'analyse montre que les OC ont rarement les ressources financières nécessaires pour embaucher des spécialistes en évaluation à l'interne. De ce fait, l'étiquette de la sous-composante « évaluateurs externes et internes » ne correspond fort probablement pas dans sa forme actuelle aux réalités du milieu communautaire. Pour pallier cette limite, le cadre conceptuel gagnerait à être discuté, adapté et validé par différents types d'acteurs du milieu communautaire québécois. Il s'agit d'une démarche qui sera réalisée prochainement par les auteurs de ce texte.

En conclusion, cet article fait un pas de plus vers le RCÉ des OC. Somme toute, il reste beaucoup de travail à accomplir pour contextualiser l'analyse par rapport aux réalités et pratiques de gestion des organisations communautaires québécoises. En effet, plusieurs questions mériteraient d'être approfondies et pourraient donner lieu à des recherches supplémentaires : dans quelle mesure les barrières et les éléments qui influencent les capacités en évaluation recensées ici sont-ils en adéquation avec la culture du milieu communautaire québécois? Quelles composantes et sous-composantes du cadre conceptuel s'avèrent essentielles pour l'analyse des capacités en évaluation des OC du Québec? Quels facteurs et influences externes ont une incidence sur le RCÉ des OC? Quels sont les besoins perçus par les acteurs du milieu québécois en matière de RCÉ? Devant l'ampleur du travail à réaliser, nous encourageons fortement les praticiens et les chercheurs qui s'intéressent à l'évaluation à faire équipe avec les acteurs du milieu communautaire québécois pour mieux comprendre leurs besoins spécifiques en matière de RCÉ.

NOTE

1. Les tablettes tactiles sont particulièrement utiles pour les OC qui réalisent du travail de rue ou pour ceux qui réalisent des activités sur différents sites (Carman, 2007).

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Tableau 2. Description détaillée des publications retenues

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Adams et al., 2015. États-Unis.	Évaluer les effets d'un programme intitulé Expectations to Change (E2C) sur les capacités en évaluation d'un échantillon d'organismes communautaires.	Méthodes qualitatives. Analyse des résultats d'un questionnaire en ligne rempli par 12 répondants œuvrant dans les organismes communautaires ayant participé au programme E2C.	Accès à un soutien professionnel intensif dans le but d'augmenter les connaissances et habiletés des salariés en évaluation. Participation active des principaux utilisateurs dans l'ensemble de la démarche évaluative. Les outils de collecte de données évaluatives sont simples, standardisés et adaptés à la routine des salariés.	Ressources limitées sur le plan financier et technologique. La motivation à produire des évaluations est extrinsèque à l'organisation (reposant sur les bailleurs de fonds).
Akintobi et al., 2012. États-Unis.	Évaluer le processus implanté par un groupe universitaire spécialisé en développement communautaire sur les capacités en évaluation d'un échantillon d'organismes communautaires en santé.	Méthodes mixtes utilisées dans trois organismes communautaires. Analyse de l'étude d'évaluabilité des trois organisations participantes. Analyse des résultats d'un questionnaire portant sur les connaissances en évaluation. Analyse d'entretiens semi-dirigés sur l'appréciation des participants quant au processus instauré par les auteurs.	Accès à un partenariat durable avec une université ou un groupe qui offre des services spécialisés en évaluation à faible coût. Accès à des formations, des téléconférences et des webinaires en évaluation.	Départ précipité des salariés (roulement du personnel).
Alaimo, 2008. États-Unis.	Explorer les perceptions qu'entretiennent des directeurs d'organismes communautaires sur l'évaluation et documenter les stratégies qu'ils utilisent pour évaluer leurs activités.	Méthodes qualitatives. Analyse de 42 entretiens effectués auprès de directeurs d'organismes communautaires.	La motivation à produire et à utiliser les évaluations est intrinsèque à la coordination. Le recours actif à la coordination dans l'ensemble du processus évaluatif. La coordination préconise une approche de gestion axée sur les résultats.	La motivation à produire et à utiliser les évaluations est extrinsèque (reposant sur les bailleurs de fonds). Mécompréhension du rôle de l'évaluation. Les consultants en évaluation adoptent une posture d'expert plutôt que d'accompagnateur lors des stratégies de renforcement.

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Andrews et al., 2008. États-Unis.	Présenter les leçons apprises par un groupe d'universitaires qui ont œuvré avec des organismes communautaires dans le but de renforcer les capacités en évaluation de ces derniers.	Récit de pratique.	Accès ponctuel à des formations et activités en évaluation destinées aux salariés des organismes communautaires. Ressources humaines et matérielles en quantité et en qualité suffisantes lors de la mise en œuvre des évaluations. Accès rapide à un soutien technique et méthodologique lors de la démarche évaluative. Utilisation des approches participatives dans la planification et la mise-en-œuvre des évaluations.	Les responsabilités de chacun des acteurs lors des évaluations ne sont pas clairement définies ou bien comprises. Climat de travail tendu et relations asymétriques.
Bourgeois et al. (2015). Canada (Ontario et Québec).	Comparer les différences et les similitudes entre les capacités en évaluation de différentes organisations canadiennes.	Méthodes qualitatives. Études de cas multiples auprès d'un organisme communautaire québécois, d'un organisme communautaire ontarien et d'un organisme fédéral.	La motivation à produire des évaluations est portée par le conseil d'administration et la coordination. Implication active de la coordination et du conseil d'administration dans la planification des évaluations. Vision partagée du rôle de l'évaluation dans l'organisation.	Départs non anticipés de travailleurs ou de membres du conseil d'administration lors de la planification ou la mise-en-œuvre des évaluations. Accès limité à des ressources humaines spécialisées en évaluation.
Carman, 2007. États-Unis.	Approfondir les méthodes et les moyens qui sont utilisés par les organismes communautaires afin de produire des évaluations.	Méthodes mixtes. Analyse de 31 entretiens semi-dirigés réalisés auprès de directeurs d'organismes communautaires. Analyse des résultats d'un questionnaire portant sur les pratiques évaluatives de 178 répondants œuvrant dans différents organismes communautaires.	Participation active du conseil d'administration et de la coordination dans les évaluations. Ressources technologiques en quantité et en qualité suffisantes pour mener des évaluations. Accès à des ressources humaines formées en évaluation de programmes. Ressources financières suffisantes pour embaucher un consultant lorsque nécessaire.	Capacité interne limitée en évaluation.

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Carman & Fredericks, 2010. États-Unis.	Identifier des tendances quant aux capacités en évaluation de divers organismes communautaires.	Méthodes quantitatives. Analyse des résultats d'un questionnaire complété par 189 acteurs œuvrant dans le milieu communautaire.	Implication du conseil d'administration et de la coordination dans la planification et la production des évaluations. Les évaluations sont sécurisées au moyen d'une politique organisationnelle.	Ressources limitées sur le plan technologique, matériel et humain. Peu de connaissances et d'expériences en évaluation. Instabilité du financement de l'organisme. Peu d'intérêt pour les pratiques évaluatives de la part des bailleurs de fonds, du conseil d'administration ou de la coordination.
Carnochan et al., 2014. États-Unis.	Approfondir les expériences et les défis des organismes communautaires lors d'une évaluation de leur performance.	Méthodes qualitatives. Études de cas multiples auprès de quatre organismes communautaires.	Implication des membres et bénévoles afin d'opérationnaliser les services de l'organisme et les résultats. Participation active de la coordination dans les démarches évaluatives. Accès à des activités de perfectionnement professionnel en évaluation. Centralisation des données en matière d'évaluation dans un système informatisé.	Les bailleurs de fonds ne s'intéressent pas aux retombées des organismes communautaires. Ressources limitées sur le plan technologique, matériel et humain. Connaissances limitées des évaluations parmi les salariés. Climat de travail tendu.
Cheverton, 2007. Australie.	Exposer comment les valeurs organisationnelles ont un effet sur la mesure de la performance.	Récit de pratique.	Vision partagée de la performance dans les organisations. Utilisation des approches participatives dans la production des évaluations de la performance.	La non-prise en compte des valeurs organisationnelles et de la mission des organismes lors des évaluations de la performance.

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Cousins et al., 2014. Canada (Ontario).	Comparer les capacités en évaluation d'organismes gouvernementaux et communautaires.	Méthodes quantitatives. Analyse des résultats d'un questionnaire complété par 160 évaluateurs du gouvernement canadien et par 89 répondants du milieu communautaire.	Accès à des activités pour augmenter les connaissances et compétences en évaluation des acteurs communautaires. Implication active de la coordination dans les activités en matière d'évaluation.	n.d.
Despard, 2016. États-Unis.	Mesurer les effets d'un programme destiné à soutenir les capacités à produire des évaluations dans les organismes communautaires.	Méthodes quantitatives. Analyse des résultats d'un questionnaire complété par 261 répondants œuvrant dans le milieu communautaire.	Accès à des formations et des ateliers en évaluation pour une durée de quelques mois. Accès rapide à un soutien technique et méthodologique pour une durée de quelques mois.	Capacités limitées sur le plan financier et humain.
Garcia-Iriarte et al., 2011. Dublin.	Documenter les impacts organisationnels que peut avoir un salarié sur les capacités en évaluation d'un organisme communautaire.	Méthodes qualitatives. Étude de cas approfondie d'un organisme communautaire.	Accès à un programme structuré de renforcement en évaluation adapté aux besoins et ressources organisationnelles. Accès à un partenariat avec une université. Motivation intrinsèque à produire des évaluations dans l'organisation. Soutien de la direction pour la production d'évaluations.	Peu de ressources humaines ou matérielles pour mettre en œuvre des évaluations dans l'organisme.
Houlbrook (2011). Sydney.	Comprendre comment la gestion axée sur les résultats influence les pratiques des organismes communautaires.	Méthodes qualitatives. Recherche-action auprès de 54 salariés du secteur communautaire.	Une vision partagée et négociée de la gestion axée sur les résultats.	

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Janzen et al., 2017. Canada (Ontario).	Explorer les répercussions de la recherche communautaire sur le renforcement des capacités en évaluation dans les organismes communautaires.	Méthodes qualitatives. Études de cas multiples auprès de deux organismes communautaires.	Participation active de la direction, des salariés et des membres dans la planification et la mise en œuvre d'évaluations. Utilisation d'approches participatives pour concevoir les évaluations. Responsabilités partagées équitablement lors de la mise en œuvre des évaluations.	Les stratégies pour augmenter les capacités en évaluation sont fondées uniquement sur les carences et les limites organisationnelles.
Kapucu et al., 2011. États-Unis.	Évaluer les effets d'une série d'ateliers sur les capacités d'un échantillon d'organismes communautaires.	Méthodes quantitatives. Analyse des résultats d'un questionnaire complété par 77 répondants œuvrant dans le milieu communautaire et ayant suivi les ateliers.	Accès à des ateliers et des groupes d'échanges portant non seulement sur l'évaluation mais également sur la gestion, le leadership et le financement.	
Kegeles et al., 2005. États-Unis.	Explorer les attitudes et les croyances concernant l'évaluation chez des acteurs œuvrant dans ou avec le milieu communautaire.	Méthodes qualitatives. Analyse d'entretiens effectués auprès de 21 salariés du secteur communautaire, de 12 bailleurs de fonds et de 11 consultants en évaluation.	Les stratégies pour renforcer les capacités en évaluation sont adaptées aux ressources financières, humaines et matérielles de l'organisme. Accès à un soutien technique rapide et peu cher. Utilisation des approches participatives en évaluation. Accès ponctuel à des groupe d'échanges sur les pratiques en évaluation.	Mécompréhension du rôle de l'évaluation pour l'amélioration des pratiques communautaires. Ressources humaines limitées en évaluation.

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Mayne, 2017. Canada (Ontario).	Décrire les pratiques et stratégies utilisées pour améliorer les capacités en évaluation dans les organismes communautaires.	Récit de pratique.	Accès à des activités, des ateliers et des formations en évaluation. Accès à des groupes d'échanges sur les pratiques évaluatives adaptées au secteur communautaire. Intérêt prononcé de la coordination envers l'évaluation. Accès à des subventions pour appuyer les organismes communautaires dans leurs capacités en évaluation.	Insuffisances de ressources financières pour mener les évaluations à terme.
Schalock et al., 2014. États-Unis.	Comprendre les effets d'un questionnaire d'autoévaluation sur l'amélioration des pratiques organisationnelles.	Méthodes qualitatives. Études de cas multiples auprès de deux organismes communautaires.	Accès à un questionnaire d'autoévaluation portant sur les capacités organisationnelles en évaluation. Ouverture de la coordination à l'innovation des pratiques organisationnelles.	n.d.
Simmons et al., 2015. États-Unis.	Décrire les effets d'un partenariat entre une université et un groupe d'organismes communautaires sur les capacités organisationnelles de ces derniers.	Méthodes mixtes. Analyse des résultats d'un questionnaire complété par 23 organismes communautaires.	Forte implication de la coordination dans le partenariat. Accès aux ressources humaines et matérielles d'une université. Accès à des groupes d'échanges sur les pratiques de gestion en milieu communautaire. Accès à des subventions pour appuyer les capacités organisationnelles des organismes communautaires.	n.d.

Tableau 2 (continué)

Auteurs, date, lieu	Objectifs	Méthodes	Facilitants au RCÉ dans les OC	Barrières au RCÉ dans les OC
Sobeck, 2008. États-Unis.	Déterminer l'efficacité d'une intervention visant à renforcer les capacités organisationnelles des organismes communautaires.	Méthodes quantitatives. Analyse des résultats d'un questionnaire complété par 125 répondants issus du milieu communautaire.	Accès à des activités et des ateliers de formation qui s'échelonnent sur cinq ans. Disponibilité de ressources financières en quantité suffisante pour les activités de perfectionnement professionnel. Stabilité des salariés et des membres.	n.d.
Yu et McLaughlin, 2013. Canada (Saskatchewan).	Comprendre comment les organismes communautaires comprennent et utilisent l'évaluation pour la prise de décision.	Méthodes qualitatives. Étude de cas comparative entre deux organismes communautaires.	Implication active des bénévoles et des salariés aux démarches en évaluation.	La motivation à utiliser les évaluations est extrinsèque (reposant sur les bailleurs de fonds). Les indicateurs de succès ne reflètent pas le travail sur le terrain.
Yung et al., 2008. États-Unis.	Identifier les besoins des organisations communautaires qui souhaitent augmenter leurs capacités organisationnelles.	Méthodes mixtes. Analyse des résultats d'un questionnaire complété par 659 répondants œuvrant dans le milieu communautaire. Analyse de contenu de groupes de discussion réalisée avec 37 participants œuvrant dans le milieu communautaire.	Accès à des ateliers portant non seulement sur les évaluations mais également sur les pratiques de gestion, le développement du leadership, le financement et le marketing.	Ressources financières limitées.

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Chasing Funding to "Eat Our Own Tail": The Invisible Emotional Work of Making Social Change

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ABSTRACT

This article presents findings from a multi-site study conducted in Montréal, QC, and Toronto, ON, Canada, on "social innovation" networks, focusing on the forms of emotional and relational work that many participants described. The article explores how these tasks related to how workers in the two nonprofit "backbone" organizations described their contributions to the impacts they hoped to make. The intersections of these forms of work and particular identities are framed within a feminist lens—when and how are these forms of relational work recognized or made invisible? This work is contextualized within neoliberal reforms, the restructuring of the state, and external funding requirements and how these determine what forms of work are deemed "impactful" in making significant social change around broad issues of homelessness and social exclusion.

RÉSUMÉ

Cet article présente les résultats d'une étude multi-sites sur les réseaux « d'innovation sociale » menée à Montréal, QC et Toronto, ON, Canada, et met l'accent sur des formes de travail émotionnel et relationnel décrites par de nombreux participants. Les auteurs explorent la relation entre ces tâches et la manière dont les travailleurs de deux organismes à but non lucratif centraux décrivent leurs contributions aux impacts qu'ils espéraient avoir. Les intersections de ces travaux et des identités particulières s'inscrivent dans une perspective féministe—quand et comment les formes de travail relationnelles sont-elles reconnues ou rendues invisible? Cet article s'inscrit dans le cadre des réformes néolibérales, de la restructuration de l'État et des besoins des bailleurs de fonds externes, et comment ceux-ci déterminent quelles formes de travail sont considérées comme ayant un impact « décisif » sur le changement social important autour des grandes questions de l'itinérance et d'exclusion sociale.

Keywords / Mots clés Social innovation; Nonprofit; Canada; Homelessness; Feminist; Neoliberalism / Innovation sociale; Le secteur sans but lucrative; Canada; Itinérance; Féministe; Néolibéralisme

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INTRODUCTION

Today's nonprofit sphere has been powerfully shaped by neoliberal shifts that have been underway since the 1990s (Coté & Simard, 2012; Griffith & Smith, 2014; Hasenfeld & Garrow, 2012). In many ways, nonprofit organizations experience the unique effects of the neoliberal restructuring of social services, including an increasing move to "social entrepreneurship" (Maier, Meyer, & Steinbereithner, 2016; Peris-Ortiz, Teulon, Bonet-Fernandez, 2017). Funding, which is increasingly dependent on the demonstration of particular "impacts" or outcomes, structures the ways that work is organized and valued within nonprofit organizations (Nichols, 2008). This structuring both contradicts and contributes to the social changes that nonprofits are hoping to make. This article explores these contradictions and intersections and the subsequent valuations of different types of work in the context of organizations pursuing "social innovation" and engaged scholarship. Specifically, it highlights the ways in which flexible schedules for workers and the pressure to be adaptive and "nimble" with respect to broader economic and political shifts intersect with gendered notions of care and social justice among people working in nonprofit settings. To produce the analyses, the article draws on data generated through three years of research on the activities of two diverse networks seeking to use social sciences and humanities research knowledge to prevent and end homelessness and to diminish forms of social marginalization. These networks are based in two Canadian cities: Montréal, Québec, and Toronto, Ontario. One network, consisting of two primary organizations and several government, academic, and nonprofit partners, focuses more heavily on policy work and knowledge mobilization in communities, nationally and internationally. The other, made up of a singular organization with multiple levels of programs and approximately a dozen regular government, academic, and nonprofit partners, is highly engaged in front line-oriented interventions. These interventions focus particularly on art and philosophy, though they also seek to make changes to public discourse and government operations. Focusing on two backbone organizations within these networks, this article asks what an increasingly neoliberal landscape means for nonprofit organizations that are working to enact real social change.

This research produced data revealing the importance of the relational and emotional work within the two networks as vital drivers of social and policy change. Emotional and relational work (which is often invisible) is an integral part of operating in the precarious and fast-paced environment in which these networks exist, both for monitoring what the social nonprofit sector describes as the social impacts demanded by funders, and for the well-being of workers (avoiding burn out, navigating personal boundaries, and maintaining important relationships). The pursuit of organizational outcomes (e.g., improving school perseverance, preventing youth homelessness) coincided with a personal, moral responsibility to contribute to social justice and change in ways that structured the work, at times resisting or contributing further to the current trend of nonprofits to adopt entrepreneurial behaviours (Maier, Meyer, & Steinbereithner, 2016), including risk-taking, innovation, and an increasing need to provide measurable outcomes to secure funds. These pressures to achieve particular measurable impacts, at times, sat uncomfortably with the human aspects of working in this sector, which workers described as drawing them to this type of work. In organizations where mandates aim to make significant shifts in response to complex social problems such as homelessness, marginalization, and poverty, relational work played an important role in maintaining hope in the face of overwhelming and, often, seemingly insurmountable human suffering.

THE INVISIBLE WORK OF SOCIAL CHANGE

In this article, invisible work, encompasses a broad understanding of what caring, emotional, and supportive work looks like for people in these organizations (Smith, 2005). Any activity that takes time and energy is conceived of as work; some forms of work are more prominent and visible than others. In describing what this work looks like, the article draws on formal and informal interviews with participants, focusing particularly on how they explained different tasks within the organization relating to "impacts" or social outcomes. The perception of impacts held a complex place within workers'

descriptions of their roles, and participants' descriptions of how their roles are valued in terms of official impacts, or how the networks were outwardly effecting social change, are explored.

When asked how their organizations were contributing to the network's larger social change goals, many workers referenced how their emotional and relational work was often hidden or not seen as directly contributing to the organizational mission, even by their own measure. Supportive and emotional tasks were often viewed as secondary to what people described as their official mandates, or less essential to carrying out the official mission of the organization (e.g., the work of writing late-night emails to stakeholders, ensuring spontaneous deadlines were met, enabling wellness among co-workers). But these activities were viewed as integral to maintaining important partnerships, negotiating funding opportunities, and the general survival of organizations. In fact, participants reported that this emotional and relational work was invaluable to how individuals and organizations were continuing their efforts toward making social change—even as it was described as secondary to a network's mission-related efforts. Particularly in organizations that aim to make shifts around urgent social issues, rethinking how this work is valued and perceived is essential to keeping workers motivated and supported, and avoiding what people described as "burn out."

APPROACH AND METHODOLOGY

The inquiry for this study began with what people do each day in their professional capacities, how they describe their roles, how they link this work to personal cost and emotional labour, and how their own conceptions of their work fit into ideas of how social impact was being achieved. This article connects what participants reported to recent literature on neoliberal shifts in Canada and their effects on the nonprofit sector, while also grounding the analysis in a feminist theorization of work (Bains, 2004; Fraser, 2016; Smith, 2004). Current funding structures and increasingly neoliberal modes of governance have "moved many non-profit service organisations away from their community-oriented focus and towards a 'business model'" (Evans, Richmond, & Shields, 2005, p. 74), with these organizations facing increasingly competitive environments to survive. Ultimately, the relational and emotional work that is being done within these networks—work that, in the case of these networks, supports people to find new and effective approaches to alleviate human suffering and social inequities—is too integral to achieving real "impacts" for it to continue to be undervalued and hidden, or for organizations to be perpetually chasing funding to "eat their own tails" (Fraser, 2016, n.p.), or contribute to their own demise through unsustainable practices.

AN INSTITUTIONAL ETHNOGRAPHIC APPROACH AND THE SOCIAL CONTEXT OF ADVOCACY WORK

This research has been shaped by an institutional ethnographic (IE) mode of inquiry (Smith, 1999, 2005). Drawing from Dorothy Smith's (1987) approach of tracing out the social relations that organize our experiences, which are based within the actualities of our everyday lives, this research began by getting at the regular things people were doing within these organizations, and how these tasks and activities fit into work being done by colleagues and partners in broader networks of social change advocacy to "move the needle" (field note, 2017) on social issues. It also explored the social conditions (e.g., shifts in government and policy) that were simultaneously shaping the work of these organizations, with the recognition that social change is the outcome of many people and factors, not just a single individual, program, or organization.

The research began with the question of how organizations (and researchers) actually contribute to social change efforts through social innovation and collaborative work, contextualizing people's descriptions of their work as part of larger shifts influencing provincial, territorial, and federal responses to homelessness and poverty. The organizations were not acting independently—both organizations explored here contributed to and participated in networks of varied actors that took on different roles to work on social issues, including service providers, government officials, business and corporate

partners, funders, and users. As such, the importance of networked relationships between different organizations was a factor in driving the impacts they were seeking to make. Data collection was guided by the following questions:

1. What are the specific activities undertaken by engaged scholars to transform research into socially just change?

2. How do social, institutional, political, and economic relations support/inhibit the influence of social science knowledge on processes of social transformation?

3. How do engaged scholars and their collaborators (e.g., practitioners, organizational and community leaders, policymakers, artists, and activists) attribute their collective efforts to the social changes they observe?

4. What methodological and conceptual strategies best enable the effects of engaged scholarship to be captured and conveyed to other key stakeholders?

While these questions initially aimed to explore how research and academic scholarship could contribute to community-based change, this article pays attention to the ways in which workers in these networks understood change-making processes more broadly. In the case of the Montréal network, study questions were adapted to reflect the variety of labour being performed, from working with partners to front-line work and from innovation-oriented research to art-program facilitation. Following Smith's (1990) articulation of institutional ethnography (IE) as a method of inquiry, the context of this research did not aim to impose "concepts or principles" but was shaped by "the actual activities of actual individuals and the material conditions of those activities" (p. 6). Thus, throughout the project, the inquiry was situated in relevant questions (e.g., when interviewing someone working closely with government partners, questions were slightly different than for those working on front-line intervention programs on the street).

WHO IS DOING WHAT WORK?

Participants in Toronto and Montréal

This research draws on 69 face-to-face interviews with participants in the Toronto network and 35 similar interviews in Montréal. Interviews took place with employees and ex-employees who held different roles in each network (CEOs, front-line workers or "mediators," administrators, etc.), as well as government, business, and national/local partners in external organizations. In both cities, we undertook two-day reflective data collection and analysis activities with the core staff members (Toronto) and office staff and project managers (Montréal). In Toronto, data collection included ongoing debriefs about collaborative work with other organizations in the network, engagement with government, and presentations. In Montréal, similar data collection focused on observing presentations and relationships in the network, and also included focus groups with those working "outside the office" and delivering front-line services.

Within these two networks, this article focuses on the work being done in two organizations, one based in Toronto and the other in Montréal. The Toronto organization describes itself as a "national coalition reimagining solutions to youth homelessness through transformations in policy, planning and practice" through "collective work [that] is evidence-driven and solutions-focused." The Montréal organization "use[s] creativity … for the social inclusion of people who experience(d) or are at risk of exclusion" and "use[s] both practical approaches … and systemic approaches inspired from social innovation, as motors of social transformation." These two organizations are focused on because neither is formally connected to a university—universities are not unaffected by neoliberal restructuring, though they may see these effects in different ways (Lund, 2018; Nikunen, 2014; Pain, 2014). Also, neither are solely doing front-line service work—for which there is

also extensive literature (Baines, 2004; Baines, Charlesworth, & Cunningham, 2015; McPhail, 2004)—which plays another, different role in the restructured social service sphere, where the state increasingly relies on front-line organizations for the provision of basic, life-sustaining services. Rather, these two organizations often work as nonprofit "brokers" between different service providers, academics, funders, government entities, and businesses in order to carry out their missions.

The methodology reflected our own roles within each network and in relation to each organization. In the Toronto-based network, each author has been involved in various capacities, as graduate research assistants and post-doctoral fellows. Kaitlin Schwan currently works in the network as a senior researcher, and Naomi Nichols is a research partner. Jayne Malenfant has been working as a graduate research assistant and lived experience scholar within the research and policy network over the last four years. As such, we are not studying these networks from outside of them but are constantly implicated within and contributing to them (Smith, 1987). This has allowed us, in particular, to have a clearer view of the shifts and histories of different organizations, ideas, and individuals throughout the project and the network itself. While we have built ties and relationships with those in the Montréal-based network over the last two years, we do not have the same access, knowledge, and history with it.

NEOLIBERALISM AND THE NONPROFIT SPHERE

Broadly, the neoliberal shifts that shape these nonprofit networks are based in the belief, of neoliberal advocates, that the state encourages the "wrong type of opportunities for individuals, in the shape of extensive redistributive programs, leading them to make wrong choices that create inefficiencies in the market" (Hilgers, 2013, p. 60). While the intention behind the cutting of social welfare programs under neoliberalism is to encourage individuals to thrive and programming to fall more closely in line with the market, the result has largely been to simultaneously defund state-supported social services, while depoliticizing the organizations that step forward to provide them instead (Evans, Richmond, & Shields, 2017). The organizations studied here exist and operate in this nonprofit context, which has been profoundly reorganized by neoliberal structuring, including shifts to privatization, managerialism, and demands for increasingly measurable outcomes (Baines, Charlesworth, & Cunningham, 2015; Hasenfeld & Garrow, 2012; Griffith & Smith, 2014; Maier, Meyer, & Steinbereithner, 2016). This may also include nonprofits becoming increasingly business-like, or taking on entrepreneurial qualities such as "innovation, risk-taking, and pro-activeness" (Maier, Meyer, & Steinbereithner, 2016, p. 71). As nonprofit organizations increasingly engage in corporate partnerships, these new funders "may prefer business-like relationships" and "may require non-profit organizations to implement business-like structures to fulfill accountability needs … or to discourage them from criticizing structural causes of poverty and inequality" (Maier, Meyer, & Steinbereithner, 2016, p. 74).

These increasing pressures to be business-like are further shaped by nonprofit organizations' growing partnerships with government. In Québec, this neoliberal restructuring (1980–1990) interacted with a strong popular and activist base of social services developed after the Quiet Revolution (Lamoureux & Lamoureux, 2009) and led to the québécois state regularly downloading responsibility—at times formally through partnerships with particular organizations. As a result, "community groups have … in some instances, been chosen by the Québec State to formally represent the interests of marginalized populations … [who] have been invited to participate in regional or provincial, social, or economic forums and processes of 'concertation' (dialogue and collaboration)" (Côté & Simard, 2012, p. 109). However, these official government (funding-based) partnerships often threaten organizations' social change agendas and limited ability to work as advocates or activists (Côté & Simard, 2012) in both provinces. Within our work with the Montréal-based organization, participants regularly described avoiding a reliance on government funding in order to maintain autonomy for activism, advocacy, and political potential. For the nonprofit sphere, neoliberal restructuring to "emphasize results over processes, and privatizing services" (Hasenfeld & Garrow, 2012, p. 302) works to "dampe[n] the sector's motivation to challenge the state and greatly curtails its historical mission to advocate and mobilize for social rights" (Hasenfeld & Garrow, 2012, p. 295).

Similarly, the funding that organizations are chasing or trying to secure (and particularly government, charity-oriented funding) in an Ontario context can lead workers to explicitly avoid thinking of their work in terms of "activism" or advocacy-motivated, as they may lose their eligibility to be funded (Nichols, 2008).

NEOLIBERALISM AND GENDERED "CARE" WORK

Within nonprofit sector social service work, scholarship on how "care" work fits into neoliberal restructuring suggests that this work is organized along gendered lines (Baines 2004; Lund, 2018). The majority of scholarship focuses on care work within social services, where individual caring is increasingly being "strip[ped] out … replac[ed] with flexible, routinized, and standardized models of work organization," with workers adapting and carrying out unpaid or unvalued labour to "fill the 'caring' gap" (Baines, 2004, p. 286). Feelings of personal responsibility, altruism, and a "sense of moral obligation" (Baines, 2004, p. 285), as well as the "presumed elasticity of women to undertake care work under any conditions" (Baines, Charlesworth, & Cunningham, 2015, p. 462), leads to the erasure of care and relational work from the "evidence" that an organization is affecting social change.

Across a spectrum of gendered work, then, increasingly "start-up" and neoliberal-oriented approaches may reinforce divides between the flexible and adaptive work of the masculine "change manager" (Baines, Charlesworth, & Cunningham, 2015, p. 471) and the flexible and adaptive (but hidden) work of the "self-sacrificing" (Baines, Charlesworth, & Cunningham, 2014, p. 35) feminine. While feminist analyses of invisible work often focus solely on women in the workplace, this study expands these analyses to gender non-binary workers as well. In the accounts of all participants, and particularly with women and non-binary workers, relationships to "outcomes" as well as human care and relational work are complex. These neoliberal restructurings of nonprofit work are clearly at play in how workers were describing their roles, as well as how they conceptualized their own contributions to the impacts their organizations hoped to make.

WHAT WORK CONTRIBUTES TO AN ORGANIZATION'S SOCIAL IMPACTS?

The valuation of different roles in nonprofits and the relationship to funding

Emotional and relational work took place throughout these networks, whether integrated into formal positions, such as "partnership liaison," or outside of them, when workers were doing tasks such as overtime work "managing relationships," navigating personal boundaries, as well as applying to and negotiating funding (which often required the above activities as well) (Field Notes, 2017, 2018). Across both networks, for example, research was highly valued, both because it was positioned as necessary to understanding and responding to complex social issues such as homelessness, but also because it was viewed as enabling the efforts by organizations to convey an evidence-based position to the public and funders who wanted "evidence-based everything" (Focus Group, 2018). Within each network, workers in key "backbone organizations" explained that those tasked with research and evidence-generation were considered to be doing work that was integral to the changes the networks hoped to make. Alternatively, the forms of work discussed in this article—the "care" or "maintenance" work of keeping the organizations running—were understood to be less visible within the larger networks themselves and often invisible in outward communications about the efforts of the networks and the organizations. Very often, this care and maintenance work took the form of activities relating to seeking funds or maintaining relationships with funders, partners, or other people in the network. This type of relational, fund-seeking, and partnership-sustaining work was regularly linked to important qualities of being "fluid," "responsive," and "adaptable" (i.e., being available to walk partners through a process at any time, meet sudden funding deadlines, and navigate personal/professional relationships). As a characteristic, fluidity was explicitly linked to an organization's impacts (receiving recognition and grants, partnering with key experts, and shifting public perception). During an interview, Alyssa, a director at the Toronto organization stated that "adaptability, flexibility, and being able to be nimble" is necessary for doing this type of work. However, the actual

tasks and work of being nimble (and, particularly, of being "accommodating" outside official organizational roles) were often less visible to others within the organization and the network and thus less clearly linked to the impacts.

PERCEPTIONS OF IMPACTS WITHIN AND OUTSIDE OF ORGANIZATIONS: CHASING FUNDING

Within the Montréal organization that grounded this exploration, we interviewed Thérèse, who worked for four years in the partnership team but had taken on different roles throughout her time there. While she saw her current work in the research lab as contributing to the changes the organization hoped to make, she did not feel the same when reflecting on her work maintaining partnerships and undertaking fund-seeking activities:

> I don't believe the work we do [with partnerships] is really making [sic] impacts. I mean, this is the job where you talk with people [who] are less in contact with [our] wording, expressions, concepts, and values, but it's really not easy, so I think it's easier to say that working on the lab could make impact. It's also easier [in the lab] to explain how what I'm doing is helping a project—so a project has impacts, what I'm doing at the partnership job, it doesn't have any impact directly on [the] organization, except the one that, then it's funded, and then you get to do the stuff people are supposed to do. But it's like, intermediary. It's actually really hard to explain it, even inside [our organization]. Like, you get a lot of criticism. You really get that.

Thérèse went on to describe the work she did seeking funds, along with a fluctuating team of two to four people, who were in charge of "finding subsidies and also money from private funders to keep the organization going." Through attempting to maintain the piecework program funding that is typical of the nonprofit sphere under neoliberal economic and managerial shifts (Evans, Richmond, & Shields, 2005), her work was seen by co-workers as not only failing to contribute to the social impacts the organization was seeking to create but also as "compromising" the mission-focused work. Thérèse's shifting and strategic use of language and frames to describe her colleague's work allowed the organization to apply for different funding opportunities as they came up (and, as a result, ensure there was enough funding coming in to pay employees, run programming, etc.), but according to Thérèse, these efforts were seen as peripheral to the real mission-driven work of the organization.

The disconnect between seeking funds and the "actual" work being carried out is not unique to this organization or network. Nichols' (2008) previous work also demonstrated how "a person's knowledge about her or his work can differ from the institutional accounts of this work that are produced to fund or officially define it" (p. 62). This is clear in the language of partnership, which was used in both networks, and is typical of relationships between nonprofits and funders under neoliberalism. Partnerships serve

> to mask a fundamental restructuring of the public sector and of the relationship between the state and civil society. The benign language of "partnership" hides a steeply hierarchical and centralised relationship of power embedded in a contractual arrangement between the state and those agencies increasingly responsible for the delivery of public goods and services … New partnership relations among for-profits, the state, and nonprofit organizations (NPO's) pushes nonprofits to become more entrepreneurial, to rely on fees for service, and to redefine their missions. (Evans, Richmonds & Shields, 2005, p. 78)

Understanding the daily work of "partnership building" has been key to understanding the broader social and political forces that are shaping how these organizations work and providing important explanations for why this fund-seeking and relational work held an ambivalent connotation for many of those doing it. The framing of the organizations' work may shift depending on the funding or partnership that is being chased, and understanding particular policy priorities or

funding requirements was described as key in achieving successful impacts. Particularly in the Montréal organization, these adaptive shifts in messaging (i.e., framing an organization as providing "charity") were seen by some as diluting or betraying the mission (field notes, 2018).

In contrast to Thérèse, Jeanne, a project coordinator in the same organization, did think she was working on "all the things" that the organization needed to make impacts, however, she saw her role as "working kind of lower down, and making sure that it's all functional … the small things." Jeanne worked with everyone in the organization and had been involved for long enough that she could do the work of educating new staff about the history of the work. In describing her role, Jeanne often spoke of making sure everything was "running smoothly" and ensuring everyone understood one another:

> They'll [project managers] do most of it, of the kind of partner relationships, and I'll be more aware of when the partner says something what it translates in terms of what we need to do to make sure we get there, [that] kind of thing.

She described her work, often, as "fixing" problems or "stabilizing" to "try to make things smoother and easier for everyone to be able to get to that beautiful thing"—that beautiful thing being the organization's mission of greater social justice and inclusion. Jeanne also saw a large part of her position as "building community" and providing space for others to think and reflect on their everyday work.

NEGOTIATING PARTNERSHIPS: "INNOVATING" BY SOMEONE ELSE'S RULES

The work of "partnership building" was difficult to define clearly, even by those carrying it out. In both contexts, it often meant seeking funds. For some, drawn-out funding cycles sometimes meant that by the time funding was received (described as anywhere from 6–24 months after the initial application), a program had shifted significantly and needed to be reworked to fit grant requirements. Mindi, in Toronto, described her own efforts to trace out how funding was being allotted in different communities her organization was working with, and how this funding related to her own professional activities and the objectives of the network. Her work included tracing, through partnerships with communities, what funding was available to them, how applications were structured, and, subsequently, returning to communities to share how they could frame their work to secure funding for new projects and programs. Rosie, a program manager in Montréal, described binders of workshops, programs, and evaluation forms that were never used more than once, because in order to secure funding, the organization had to be seen as either continuously "innovating" or shifting to fall in line with what funders were looking for. Thérèse also described the work of playing a funding game where you're not entirely sure of all of the rules, trying to cast and frame programs in ways that fit the requirements for a given grant or subsidy.

Those working to sustain partnerships and collaborations, essential to the network's functioning, described much of their labour as navigating relationships, or, at times, "hand-holding"—careful work brokering partnerships with others. This work aimed to ensure not only that they were communicating outside of their organizations but that partners were feeling valued, supported, informed, and acknowledged, that relationships were "solid," and people were genuinely "on board." The transformative nature of this work became clear when we spoke with individuals working in partner organizations. April, who managed the charitable foundation affiliated with a large national chain of stores, saw Toronto-based CEO and co-founder Marianne as a key actor in providing a "true understanding" of the issue of homelessness, describing their partnership as "fantastic." Colleen, a community outreach coordinator at a large provincial service in Québec, saw much of her work as "inspired by" and supported by the Montréal organization. This careful work—including maintaining these relationships—was often related to funding, and required the careful navigation of relationships with funders and other organizations doing similar work and competing for the same pools of funding (not "stepping on someone else's

turf"). As Marianne and Mindi described in Toronto, receiving funding that another organization did not could strain relationships and disrupt the work of partnership building. This work was part of the job, but also often outside of the time, hours, and tasks that officially fell within their roles in their organizations. This blurring of the boundaries between work and home is increasingly typical for those working in nonprofits (Baines, Charlesworth, & Cunningham, 2012; Hasenfeld & Garrow, 2012).

WORKING ON "ALL THE THINGS": CARE WORK AND NIMBLENESS

When describing her own position within the Ontario network, Mindi stated that she had a very difficult time explaining what she did to friends and family; that her position had changed and "evolved" many times throughout her work in this network, adapting to different community, policy, and environmental shifts; and that her role changed as the organization changed, particularly as new funders became involved. Her work often played a role in "helping" or, often, "walking alongside" community partners, answering questions and liaising with people who were working on policy. She also described working on many other projects that "weren't in her mandate." Her colleague Alyssa described her work as necessarily unpredictable, where she worked to "follow up on contacts" and needed to "just [be] adaptable to whatever kind of comes up during the week." Jeanne described taking on work in an organization's research lab, on its communications team, as its partnership liaison, volunteer coordinator, office administrator, and payroll coordinator, as well as answering phones, watering plants, and fixing printers, all within the course of a month as needed. This was not out of the ordinary in terms of how study participants described their roles in their organizations and within the broader networks their organizations participated in.

During the initial shifts of the neoliberal restructuring of the nonprofit sphere, these "innovative, flexible, and non-bureaucratic" (Evans, Richmond & Shields, 2005, p. 75) qualities were seen as key in downloading increasing social responsibility away from the state and onto nonprofit organizations. As Terry, a program director from Toronto, described, even when preparing to take a day off, people are expected to respond to text messages from partners, a key activity that contributed to this necessary "nimbleness," though this often meant that they were carrying out tasks in the evening or on weekends:

> But you want to be responsive, and I feel like we do that during the day, like I do, I don't know about "we." But I want to have as much clear time on my calendar for when those things pop up that I can be really responsive, and then, you know, I get home, I have dinner and I'm looking at my to-do list, and I'm like, "Oh, you know, it's quiet. I can write now. Or I can read that report."

Workers described having to be almost constantly available to do this hand-holding, brokering, responding, and relationship building. While these relationships are often described in genuinely positive terms—as important both inside and outside of official organization business—they hold an ambivalent place in neoliberal measurement structures and in the more entrepreneurial structuring of nonprofit work. Indeed, the work of sustaining relationships is integral to ensuring these organizations survive—financially and also within the network of actors collectively working toward achieving similar social changes. While these neoliberal shifts may seem to compromise the value of these forms of nimble work, the fluidity and responsiveness that workers describe as "key" to the success of their organizations can be linked to the increasing neoliberal application of market-based models to nonprofit services and increasing competition as funding is harder to secure. These characteristics are typical of nonprofits becoming more "business-like" (Maier, Meyer, & Steinbereithner, 2016, p. 65).

GENDERED ROLES AND WORK

The data also suggest a link between gendered identities and this emotional labour, where women and gender non-

binary workers described taking on much of this emotional, supportive, and responsive work. While it is not simply women and non-binary workers doing the work of enabling organizational "nimbleness," "community building," or relational/care work, men used different discursive frames to talk about their own professional work and responsibilities. In both networks broadly, men more frequently highlighted "research" or work relating to "evidence," "experimentation," or "science"—which, due to the objectives or impacts organizations were trying to make (and their efforts to conclusively demonstrate progress toward these change goals [Hasenfeld & Garrow, 2012]) were important roles. If men were undertaking this type of supporting work, they often framed it as strategic and rarely spoke of the emotional aspect of relational tasks.

When men were occupying roles that required more supportive or sustaining work, they were more likely to be hired temporarily or were interns. Women who were heads of their departments and were engaged in managing front-line projects or doing "innovative" aspects of research were also willing and expected to tend to relationships with various partners (or hand-holding)—all while they were carrying out tasks in their higher-level positions. Some men did discuss the personal toll that highly competitive funding structures and emotional work could take, though they were less likely to create structures of support or debrief with co-workers with respect to the emotional toll of the work.

Within these organizations, the same neoliberal forces and social institutions that organize the work of women and non-binary workers organize that of men, though they may experience them differently. All workers are implicated in gendered work, which is "socially constructed in relation to other identities" including race, sexuality, and able bodied-ness (Baines, Charlesworth, Cunningham, & Dassinger, 2012). Gendered work is also more often linked to a feeling of social responsibility or "self-sacrificing" (Baines, Charlesworth, & Cunningham, 2014, p. 34) ethical stances and may lead to workers feeling an ethical obligation to work overtime and participate in relationship building outside of work hours as a resistance to the standardization and measurement of work, including "community-building" (Baines, Charlesworth, & Cunningham 2015). Traditionally the notion of invisible work in feminist theory focused on "domestic" and gendered work in the home, such as "birthing and raising children" (Fraser, 2016). Invisible, gendered, and undervalued work historically (and often still) involves "maintaining households, building communities, and sustaining the shared meanings, affective dispositions and horizons of value that underpin social cooperation" (Fraser, 2016).

EATING OUR OWN TAIL: HIERARCHIES AND CARE WITHIN THE CAPITALIST CONTRADICTION

Within the organizations studied here, the "scientific" activities associated with research are framed as integral to the mission-driven work of the organizations in question, and other forms of work connected to maintenance, community-building, and sustenance roles are more likely to be erased within dominant workplace narratives and structures. Smith (1987) has observed that moves toward "professionalization" restructured the sustaining and relational work historically undertaken by women into "hierarchical strata, detaching them from the movements they originate in and connecting them to the relations of ruling" (p. 216). Similarly Nancy Fraser's (2016) notion of a "crisis of care" outlines a "capitalist contradiction" of care that devalues this invisible or relational work and depends on it to perpetuate and reproduce capitalist social norms. Often reluctantly, to stay afloat economically nonprofit organizations must "mimic the practices and culture of their institutional counterparts" (Côté & Simard, 2012, p. 109) which leads to these negative or ambivalent feelings about "compromising" the mandate of the work.

Similarly, in these organizations—as in universities, homes, and all of our environments under capitalism (Fraser, 2016)—this work helps to actually support the erasure of itself by painting the "impacts" that matter most as detached from the huge amount of relational and emotional work that supports them. This is the "capitalist contradiction" (Fraser, 2016) of care that comes out of the unequal valuing of different forms of (often gendered) work across a range of domains. Capitalism contributes directly to its own demise by diminishing or erasing the importance of care work that allows for its

core values to be reproduced, perpetuating a cycle wherein it "eats its own tail" (Fraser, 2016). Similarly, the neoliberal imposition of funding requirements causes nonprofits to work—and work overtime—to eat their own tails. In practice, this imperative drives organizations to continuously undertake new types of work to chase funding and meet funders' demands. These shifts in people's work and the frames through which the work is understood takes results in the redirection of time and resources away from activities that are seen as explicitly driving the impacts an organization actually hopes to make. In this process, emotional and relational work that people are undertaking—particularly in relation to partnerships and seeking funds—is difficult to quantify and may actually be seen as detracting from an organization's "performance-enhancing measures" (Côté & Simard, 2012, p. 115).

DOING EMOTIONAL WORK AND WORK WITH EMOTIONS

Within these two organizations, much of the emotional and caring work people talked about and we observed—for example, hosting craft nights with co-workers, going out for drinks with partners, and supportive tasks such as sending emails to encourage people their work was making a difference—is neither an official nor an unofficial part of the job. This ongoing work was linked to, but officially separate from, the relationship building that was "in the mandate" for certain workers. While building personal relationships was part of the job, key in building important solidarity networks, and understood as important to avoid "burn out" (in that it provided personal supports), it could also blur boundaries and require additional efforts to navigate work/social relationships and obligations. This work was, again, linked to emotional depletion and the navigation of personal boundaries from working in a field where people were attempting to alleviate or impact large social problems such as homelessness. As Terry describes:

> Terry (T): I think that happens a lot, but I think the personal relationships are there when there are those hard conversations, you're able to go for a coffee or a beer and say, listen, it's not personal.
>
> Interviewer (I): Yes. Tell me about that. How do you negotiate between what can be very heated professional conversations and the work that you guys do? Because you also do work socially together.
>
> T: Where was it? I think it was at a conference in Montréal, or it could've been—it was somewhere in—it might have been Ottawa. I forget what the gathering was, but like I had this conversation with one of our partners and it was like, what that fuck is going on?
>
> I: Yeah.
>
> T: This is already hard work, why are we making this harder? Like, what's going on with you, why you're reacting to things the way you are? I think it got to a point where we had a few beers, we both cried, and I'm like—and we're like, okay.
>
> I: Because there was a piece that you didn't see that was going on for that person?
>
> T: Yeah.

A significant amount of work goes into navigating these boundaries—working with other people (and "supporting people we care about" (Interview, 2018) who also wanted to "move the needle" (Interview, 2018) on urgent issues pertaining to social inclusion, marginalization, and homelessness—when personal and professional approaches or goals conflicted.

This ongoing emotional work—which often spilled outside of the frame of the official work day—was directly related to increasing pressure on nonprofits to follow an "entrepreneurial" business model, blurring the boundaries between working for social change and engaging in social entrepreneurship (Peris-Ortiz, Teulon, & Bonet-Fernandez, 2017). This work also took such an emotional and personal toll because these organizations were working to make significant shifts around

issues such as homelessness and poverty and in the lives of people. A similar task, as described by Mindi, was navigating the blurring of boundaries between work investment and personal investment. She described frustration, despite seeing that she and others in her organizations were adapting and working in new ways around homelessness that they felt were "making a difference"—and then leaving work and seeing members of her community that were still on the street:

> I struggle with that. I don't know if there's an answer to that. I honestly don't … I still feel like that. I have to constantly deal with that feeling. When I go to the liquor store, for example there's always someone there, and it's often a young person. I feel my fear and anxiety come up, and … then I realize it's the guilt that I'm experiencing because I'm not able to help them. Even at that level, whether you hand out or say hello or don't, all that stuff just comes up, bubbles up constantly.

These sentiments were pronounced for workers in Montréal as well. The one fear, as Rosie said, "is not doing enough" to make sufficient headway toward your organization's social change goals. "Feel[ing] like you can do more" was a constant point of reflection for workers in both provinces. In Montréal, participants expressed frustration that they could see positive social changes one day, only for them to disappear from view the next. Helena also saw a conflict between the emotional "moments with people" she found impactful and a (funding-related) "addiction to … innovation." Furthermore, in contexts where minor gains are overshadowed by the presence of ongoing human suffering and exclusion, there is an ongoing need to care not only for others but also for oneself. This additional self-care work is essential in order to suppress the pervasive sense of obligation and urgency that drives people to work continuously and relentlessly until they burn out.

CULTIVATING AND QUANTIFYING NIMBLENESS

Linked to the "start-up" mentality of intense, competitive, and constantly innovating work, a feeling of responsibility was also linked to the social justice mandates each organization maintained. Mindi described the interconnectedness of issues of homelessness and broader global issues facing youth, including sexual violence, religious and national fundamentalism, and police violence, as well as the inability of the organization she worked for to do all things for all young people. Thérèse shared feelings that these issues could seem insurmountable to a singular organization, network, or individual, and it was difficult for many workers to see where their own individual daily tasks could contribute to these vast global structures of social inequality. This sense of personal responsibility, as well as the responsibility to care for others in an organization or network, carried into fund-seeking activities as well. When failing to receive funding or broker a partnership, extra work also had to be done to separate it from a personal sense of urgency and responsibility. In Toronto, Marianne described this as a need to try to mitigate her feelings of being "personally invested" in the success or failure of funding applications or outcomes in a particular program:

> The thing is I found, of late, I was feeling very personally invested. Like so personally invested, then I was like, oh wait a second, yes, this is very important work, but it's also just a job. To just step back a little bit and be like, what's innovative about this has to be our willingness to be wrong and to try other things.

For her, this "willingness to be wrong" was necessary to continue to be nimble and adaptive, but also required the recognition that this was "just a job" and not a personal failure if things were not going well, or if organizations were seeing rapid social change. In fact, she saw this risk-taking as key to her organization's success in making "impacts." In Montréal, Philippe echoed how hard it was to not take a failure to receive a grant or funding for an especially exciting or innovative program extremely personally, and as a reflection that he had not been working hard enough. When a funding opportunity did not pan out, he said it was easy for him and other workers to "get mad … there is [sic] a lot of emotional links to what we do."

Finally, this emotional work, within a neoliberal nonprofit sphere, may lead organizations to request the help of outsiders (who may offer an objective perspective, often for a fee) who can work to quantify the impacts or outcomes the organization is producing. A common player in the neoliberal restructuring of nonprofit organizations (Côté & Simard, 2012), consultants are often hired to communicate with boards of directors, funders, and other stakeholders, particularly those who may not be familiar with the work itself. These outsiders highlight the organization's key objectives and work to achieve them, but often in abstract generalizable terms that funders and people outside of the organization can easily understand (field notes, 2017, 2018). This translation work on the part of consultants (and sometimes on the part of an organization's actual staff) functions to erase or smooth over much of the difficult work that people describe as essential to the change-making processes they are participating in. Indeed, over time, the consultants themselves may shift or change the way that organizations think and talk about their work, emphasizing ways to increase productivity, efficiency, and public interest, which may be at odds with the organization's culture (Côté & Simard, 2012). While some people saw hired consultants as having some potential utility in terms of better understanding their organization's contributions to larger social change goals, people also felt the consultants' generalized reports failed to capture necessary pieces of what made an organization special, impactful, or effective.

CONCLUSION: RE-INSPIRATION AND RESTRUCTURING VALUE

While this may paint a bleak picture of the neoliberal pressures that face many nonprofit organizations hoping to make important social shifts today, it is not occurring without resistance. There is an effort and awareness from participants in this study that aims to resist values that are placed on (and displace) certain forms of labour in ways that instead choose to highlight care, support, and emotion within these spaces. In Toronto, this was framed as valuing the work that gives hope, inspires (or "re-inspires"), or builds up solidarity with others. Sometimes this does take the form of hand-holding, or "walking alongside" someone (for example, sending an email to someone who is struggling, encouraging someone to take a day off), though the day-to-day reality of this work is not always in line with official organizational definitions of "partnership building." It was presented as highlighting "human" or authentic work, rather than simply bringing someone on board to your message or mission as an organization (though there may be intersections with this branding and messaging work). It was "supporting the people that we care about, because we care about them as people." Some people were also actively seeking to acknowledge and value this work before individuals burned out and were unable to continue their work. As Marianne conveyed to staff during a focus group discussion, "I just want you to know, I appreciate the work you do every day."

In a focus group at the Toronto organization, several participants articulated that while the work of "re-inspiration" was not an official goal (as communicated in their organizational mandate), they wanted to make it their number one "stated goal." They understood much of the work they did as re-inspiring, helping, and supporting those who may have once wanted to really make social change happen but had lost their ability, desire, or drive to continue working in these kinds of conditions. Workers described trying to bring re-inspiring work back into their own communities in their day-to-day roles. Marianne was described as doing this work often, particularly with government partners who may feel they cannot push back against restrictive policies. It encompasses fostering hope and making "authentic connections" with others trying to make the same shifts around social issues, to "pull people back so they can see the big picture," (Interview, 2017) to "shine the spotlight" or showcase work that is currently being undervalued, and to say, "you're doing good work, here's some recognition of it, and thank you for your time" (Group Interview, 2018). This was the work done to "inspire people to not only care about the issue but to think and act differently," (Group Interview, 2018) and it was important, particularly with funders, to "find the time and space to re-inspire." Within their own organizations, participants saw their mutual supports as better positioning them to provide the same for others, and that this environment "translates out—when we're able to support each other, then we can better support others." (Group Interview, 2018).

In Montréal, as well, there was a widespread recognition of the value of reflecting on and shifting how work was being understood within the organization. In a mapping exercise, workers described pushing back against what Helena called the "addiction to innovation," and recognized that reciprocal relationships with different partners and communities meant impacts happen multi-directionally—and organizational strategies must shift to accommodate new knowledge and feedback, including a willingness to be wrong. Similar to Marianne's "willingness to fail," workers found vying for particular, measurable outcomes to be limiting; they saw huge possibility in deep reflection and room for seeing human relationships and transformations as "impacts" in and of themselves. While admitting that too much reflection can lead to an organization getting a "little stuck," they saw it as integral to achieving "real social change" instead of acting as "saviours" or "carrying out charity." They hoped to make "deep and systemic social transformations" (Field Notes, 2017).

This is a radical re-imagining of what kind of work is necessary to contribute to social change within organizations that may be increasingly pressured to produce evidence and to "emphasize results over processes" (Hasenfeld & Garrow, 2012, p. 302). (It may also revisit strategies that were previously more common in nonprofit organizations.) This shift seems an important one if organizations such as these are to be equipped to actually push for socially just change. Without this shift, organizations will constantly be playing catch-up, both with funders and by "eating their own tails" trying to see concrete social impacts. This invisible, emotional, and supportive labour is clearly necessary for individual workers, organizations, and the achievements of social impacts more broadly. It is the valuation of the work within organizations that contributes to shifts in social policies, practices, and people's experience and pushing back against the erasure of connections between the daily work of people—the work that goes into maintaining all the moving pieces of an organization—that should be recognized as a key part in the process of contributing to social change.

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Funding Nonprofit Radio Technology Initiatives in Canada

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ABSTRACT

Media organizations worldwide are struggling to find sustainable financial models since the arrival of the internet. Nonprofit radio is no different. Using a thematic analysis of 62 Canadian nonprofit stations' financial statements from 2012–2015, this study examines the impact of the Community Radio Fund of Canada's Radiometers' grant competition. Although results show a small financial gain for those who received funding, the study fails to determine the value of relying on such a grant for long-term technological sustainability. This study also shows the classic income effect by demonstrating how stations continued spending on technology whether they received grants or not. Recommendations include creating a matching fund program to encourage stations to find alternative sources of income to sustain their projects and increase accountability.

RÉSUMÉ

Les organisations de médias à travers le monde luttent pour trouver des modèles financiers durables depuis l'arrivée d'internet. La radio à but non lucratif n'y échappe pas non plus. En effectuant une analyse thématique des états financiers de 62 stations canadiennes à but non lucratif de 2012-2015, cette étude examine l'impact de la compétition Radiomètres du Fonds canadien de la radio communautaire. Malgré le fait que les résultats démontrent un petit gain financier pour ceux ayant reçu du financement, l'étude ne parvient pas à démontrer la valeur de ce type de subvention pour une durabilité technologique à long terme. Cette étude valide aussi l'effet de revenu classique en démontrant que les stations continuent à effectuer des dépenses en technologie, peu importe s'ils ont obtenu ou non une subvention. Les recommandations comprennent la création d'un programme de fonds de contrepartie, afin d'encourager les stations à trouver des sources alternatives de revenus afin de soutenir leurs projets et d'accroître l'imputabilité.

Keywords / Mots clés Nonprofit radio; Technology; Funding; Canada / Radio à but non lucratif; Technologie; Financement; Canada

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INTRODUCTION

In Canada, radio broadcasting represents 10.5 percent of overall broadcasting revenue (40.1% for television and 49.4% for cable, satellite, and internet protocol television [IPTV], otherwise known as broadcast distribution undertakings, or BDUs, in Canada) and it is divided into three types of stations: commercial radio stations, stations operated by the public broadcaster, and other non-commercial stations (CRTC, 2018). These non-commercial stations include community, campus, Indigenous, and religious stations. For the most part, they are nonprofit radio stations funded by the community through local adverting (84%, as opposed to 65% for commercial stations), fundraising, and government grants (CRTC, 2018). In 2017, these stations generated $71.8 million in revenue (CRTC, 2018) and accounted for 25.4 percent of the radio industry (CRTC, 2017a). Despite losing seven stations from 2013 to 2017, the sector has seen modest financial growth, which is impressive given radio listenership has been slowly declining for more than a decade.

While community radio stations, in particular, are "inexpensive and easy to build and operate" (Salter & Odartey-Wellington, 2008, p. 286), increasing costs, competition, and constant pressure to keep up with technological developments present continuous challenges. In a recent Canadian Radio-television and Telecommunications Commission (CRTC)[1] hearing, some groups (CHUO FM was provided as an example, but, unfortunately, not all parties were identified in the decision) even suggested that instructional stations that are part of the sector should simply "migrate to Internet broadcasting" (CRTC, 2010, par. 23). Despite its hardships, however, the sector is known for its creativity, including "develop[ing] technologies to serve identifiable needs rather than market gaps" (Rennie, 2007, p. 25). In other words, stations tend to cater to the needs of their specific communities rather than create content or services that correspond to communities identified through market surveys, such as targeting a particular age group that is perceived to be more susceptible to listening to radio. For example, a radio archive may be created to protect the cultural heritage of an Indigenous community rather than spending money on advertising. Funds may also serve to create spoken-word content from the LBGTQ2+ community that can be shared throughout a network instead of sponsoring a pop music festival geared to 15-year-olds, which would be akin to commercial radio practices.

The CRTC itself has even determined that community radio stations offer Canadian listenership a choice because they have a mandate to reflect those they serve and also to distinguish themselves from commercial stations (Salter & Odartey-Wellington, 2008). In debates leading up to the current Campus and Community Radio Policy (CRTC, 2010), it became clear that the internet is seen as a useful supplement and not a replacement for traditional community radio broadcasting (Fauteux, 2015). A community station offers more than just on-air broadcasting. It is a meeting place and a platform for marketing local talent. This conclusion allowed decisions about the sector to be brought back to the important issue of finding ways to maintain its sustainability and continue to improve its technological development. As such, this study sheds light on how well stations that have received funding for projects with technological implications through the Community Radio Fund of Canada (CRFC) are performing in relation to those that did not.

The CRFC is an independent nonprofit organization created in 2007 through a partnership between the three largest community radio associations in the country.[2] It was seen as a solution to help "build and improve campus and community radio for all Canadians" (CRFC, n.d.-a). The organization truly blossomed when the CRTC determined that the CRFC was approved to manage over $1.5 million emerging from the unprecedented merger of media giants Astral Media Inc. and Standard Radio (CRTC, 2007). This $1.8 billion deal created the largest radio broadcasting company in the country (CBC, 2007). In 2010, the CRTC (2010) went a step further in suggesting that a mandatory 15 percent of annual Canadian content development[3] contributions be made to the CRFC. This suggestion was implemented as an amendment to the Radio Regulations, 1986 on 31 July, 2013 (CRTC, 2013). Since its inception, the CRFC (2018) has distributed several million dollars to campus and community stations in the country, including over $12 million through its Radiometers program alone.

The CRFC has run four distinct programs since its launch. The Radio Talent Development Program ran from 2009 to 2014 and served to develop "innovative local interest programing by: a) producing local-interest content in the area of spoken word, and b) providing training, mentoring, and-or education to those producing this content" (CFRC, n.d.-b). It provided $461,539 for 65 different projects. The Youth Internship Program also ran from 2009 to 2014 and awarded $494,879 for 62 internship-related projects (CRFC, n.d.-c). Youth on Air! was launched in 2015 as a pilot project. The goal of this program is to offer training, mentoring, and education projects (CRFC, n.d.-d). So far, $419,303 has been awarded to 44 different projects in its two first rounds (CRFC, n.d.-d). Finally, there is Radiometers, which is the program most relevant to this article. Since September 2012, it has awarded over $12 million for 360 unique projects (CRFC, 2018). This "outcome-based approach" program serves to fund projects from stations that hold a valid campus or community radio licence. The CRFC and its funders must be able to measure the short-, medium-, and long-term success of the projects using a series of metrics (CRFC, 2018a). Individual stations put forth projects with the approval of their board of directors. The CRFC ultimately measures the success of the projects. No study, to our knowledge, has yet examined the CRFC's management of this process as well as how stations have performed when awarded different grants.

The CRFC's (n.d.) programs are built around four priority areas: local community news and access, community music and expression, emerging distribution technologies, and sustainability and capacity building. This article closely analyzes this last priority.

Unlike other sectors such as health and education, the media industry does not have a systematic evaluation practice as part of its day-to-day activities. In the media sector, particularly regarding radio, evaluation differs from how it is considered in other disciplines. Using the term itself is somewhat off-putting, as the assessment exercises are limited to reports by consultants in the field providing expert advice on their perception of the success of a program or policy loosely using methodology that is often not documented and cannot be replicated (Bonin, 2010). Notwithstanding government reports on the state of the broadcasting sector (see, for example, the Standing Committee on Canadian Heritage, 2003, and yearly CRTC monitoring reports academic research in this particular area of the community sector has been scarce (Bonin, 2012), which explains why many questions about evaluation and its role in the sector still remain unanswered, including issues of financial accountability. However, the purpose of this article is not so much to examine the historical nature of evaluation in the sector but, using an evaluation-inspired methodology, to examine grant utilization as a justifiable option for funding technological initiatives over time. With this in mind, it is not unreasonable to wonder what the impact of a young organization such as the CRFC has been in achieving its specific program objectives and to what extent it offers hope for a more sustainable future. Consequently, this article seeks to answer the following two preparatory questions as they lay the initial groundwork for ongoing research on this particular aspect of community radio funding and the development of evaluation tools to study this sector of broadcasting:

- What impact has the CRFC's support for initiatives related to technology had on the financial situation of stations that have benefited from grants in comparison to those that have not?
- How valuable is the grant funding from the CRFC for sustaining individual stations and their technological plans?

The following pages present a detailed description of the sector and funding, as well as an overview of existing research in the field. The methodology for this study follows, which is inspired by formal evaluation processes (or standards), including the sampling process, a breakdown of the information gathered, and the way it was aggregated. A presentation of the results comes next, followed by the discussion and conclusion, which focus on the ways Canadian nonprofit radio stations can improve in the face of an ever-changing broadcasting landscape.

OVERVIEW OF THE NONPROFIT RADIO SECTOR IN CANADA

According to the CRTC's (2018) annual monitoring report, Canada's radio industry comprises 712 commercial stations

(591 FM stations) generating $1.5 billion in revenue; 67 public radio stations (53 FM stations) operated by the Canadian Broadcasting Corporation (CBC), generating $295 million in revenue; and 221 non-commercial stations generating $71.8 million in revenue.[5] The non-commercial stations average about $325,000 in revenue and are comprised of 48 campus stations: 112 community stations, 32 Indigenous stations, and 29 religious stations (CRTC, 2018)[6].

Most Canadian studies related to this sector have generally been interested in "community and campus stations." However, the most recent CRTC (2010) policy (Broadcasting Regulatory Policy CRTC 2010-499) divided stations into two distinct categories. Stations on university and college campuses[7] are called "campus stations." These are different from so-called "instructional stations," which are often in a closed circuit or are used strictly as training facilities to teach future radio professionals. In 2010, the CRTC (2010) decided it would no longer provide licences for instructional stations but would allow those running the stations the opportunity to apply as a formal "campus station" according to their needs.

"Community stations" are those situated outside educational facilities that serve the communities in which they are established (CRTC, 2010). Prior to 2010, stations were considered to be campus-community stations because the employees and volunteers of these stations were not only from educational institutions, but also from the community at large. This is most likely due to their higher wattage which allowed them to reach people outside campus boundaries and to participate in off campus activities. Although the terms have changed, the realities of these stations have not. For example, several campus stations are still run by various people in the community, not only by students. Some of these stations rent space on campuses.

These policy changes were made to better distinguish station licences, yet the term "nonprofit stations" is used in this study, as it is felt to be more inclusive of both community and campus stations, as well as of all other stations that have a nonprofit status.[8] This is important as it includes some stations the CRTC (1990) calls "native" or "aboriginal" stations, but have a nonprofit status, and therefore, similar financial obligations and governance structures. This study refers to them as "Indigenous or First Nations stations" as this is the current socially acceptable terminology. "Indigenous stations" is also the term the CRTC used in its last monitoring report. Although the Indigenous stations are not eligible for the CRFC's grants, it is important to note their existence as they were part of the initial population.

FUNDING OF CANADIAN NONPROFIT RADIO

The main difference among stations in the nonprofit sector relates to their financial profile. Campus stations often have a steady income in the form of levies collected from fees paid by students for ancillary services provided on campus. Some exceptions remain, for example, station CJMQ out of Sherbrooke, Québec, holds a community licence while operating from the Bishop University campus. Its main funding comes from the Québec government (Culture et communications Québec, 2016). Community stations, on the other hand, do not benefit from this type of funding. Some universities allow exemptions of these payments, but most students do not avail themselves of this option. It may be that they are not informed of this possibility, perhaps they simply feel their station is part of a healthy campus life or, more likely, that the process to opt out is cumbersome. In the fall of 2019, however, campus stations in Ontario will likely take quite a hit in this respect, as the provincial government's proposed new policy framework (Ministry of Training, Colleges and Universities, 2019) allows students to opt out of certain student services at the time of registration. This new policy was proposed as a solution to reduce tuition fees without considering consequences. This decision will have a detrimental impact on campus station revenues throughout the province, democracy as a whole, and may even lead to the closure of stations.

There are other particularities when it comes to funding. Community stations in Québec (excluding campus and instructional and Indigenous stations) receive a basic annual funding amount from the provincial government that ranges from $39,665 to $60,000, in addition to another amount that is determined based on their production (Culture et communication

Québec, 2016). There are many Indigenous radio stations in Canada that operate on land belonging to First Nations, Inuit, and Metis people. These stations are exempt from the current native radio broadcasting policy (CRTC, 1998). Other licenced nonprofit stations that serve Indigenous communities throughout Canada receive federal funding, except those below the Hamelin line.[9] However, since the early 1990s, this funding has drastically diminished, leaving Indigenous community stations to find alternative ways to support themselves while continuing to produce content and serve their communities.

Since the majority of community stations across the country are not privy to steady financial support, it is not surprising that people working in this sector are consistently trying to improve their collective situation by finding more sustainable funding options. The majority of stations take part in advertising and fundraising activities, but the recent establishment of the CRFC has provided new options for station development. The effectiveness of this funding source as a sustainable solution for the sector is still up for debate. As explained in the next section, this situation is not unique to Canada.

RESEARCH ON NONPROFIT RADIO

According to Gretchen King (2017), there are various definitions and documented histories of community radio, which are as unique as the contexts it has evolved in. To describe its history, King (2017) maintains that researchers start in different places from the evolution of early broadcasting by Indigenous peoples to the development of broadcasting technologies and from the creation of regulation and policies to what she suggests is a more encompassing view involving a review of community radio practises from around the world. Although macro research in philanthropy or nonprofit management may have provided some general information on financial management, sustainability, or the evaluation of nonprofits, these were voluntarily put aside due to the specificities of the subject at hand, the federal jurisdiction of radio in Canada, and the fact that no other article has examined the scope of research within the sector itself to determine the availability of information on nonprofit finances among the variety of themes and topics. This article, therefore, highlights and acknowledges these research themes on nonprofit radio, but focuses on the empirical work that has been conducted about this sector worldwide, particularly in the form of case studies, as it relates specifically to funding, which is most relevant in this context. In other words, this article is not only shaped by a theoretical framework of combined studies on community media but also builds a new lens through which to examine community radio funding.

Despite possible links to financial management, several articles were also excluded. Studies on politics and media in countries such as Colombia (Murillo, 2003), Zimbabwe (Mhiripiri, 2011), and Brazil (Leal, 2009) were only tangentially pertinent; although they discussed the benefits of radio for discourse formation and social change, they did not provide any insight into the ways in which stations are funded to achieve these objectives. Other studies focusing on the relationship between community radio and mental health (Bonini, 2005; Meadows & Foxwell, 2011), empowerment and social change (Jallov, 2004; Wagg, 2004), democracy and ethics (Bresnahan, 2007; Gaynor & O'Brien, 2011; Rennie, Berkeley, & Murphet, 2010), as well as regulation and policy issues (Coyer, 2006) in countries such as Thailand (Elliott, 2010; Magpanthong & McDaniel, 2011) also failed to provide information relevant to the financial context of nonprofit radio, despite explaining the benefits of the radio sector itself. For example, Evan Light (2012) provides insight into the regulatory framework for community media in Canada, but only by way of introducing another topic: community radio participation in Québec.

Studies on radio audiences in countries such as Australia (Ewart, 2012) and the United States (Conti, 2011) are not as prevalent in the literature and warrant further study. Cynthia Conti (2011) describes the relationship between low-powered FM non-commercial stations and the local communities they serve. Offering relevant content about the locations they serve, having to find volunteers in those areas, and asking the same people for donations has not resulted in sustained interest of the stations and raises questions related to requirements to finance them. This is the case in many countries, including Canada, where the "grand idea" for nonprofit stations is valued by most, but made to be marginal by forcing au-

diences to sustain stations without first determining if there is an ongoing interest to support them through listenership, financial backing, and volunteerism. The issues described by Conti (2011) need more exploration, as does the use of audience measurement, which, traditionally, has been primarily used by the commercial sector, which can afford the consulting services required to gather this data. Though not directly related to the study at hand, the examination of audience research in the field does reveal some preconceived notions about the sector and how it is meant to sustain itself. In other words, the ideal scenario would include active audiences willing to provide enough ongoing support for stations to justify the funding and even the licences themselves.

The most prevalent form of research on community radio worldwide is done through overviews and case studies. Some of the most recent country-based case studies include Australia (Forde, Meadows, & Foxwell, 2003; O'Connor, 2012), Bolivia (O'Connor, 2004), Brazil (Torres, 2012), Colombia (Rodríguez & El Gazi, 2007), India (Sharma, 2011), Ireland (Day, 2009), Nepal (Banjade, 2006), Senegal (Smirès, 2011), Spain (Bergés, 2012; Escudero, 2003), South Africa (Bosch, 2007), Sri Lanka (Seneviratne, 2011), Thailand (Elliott, 2010), the United States (Dunaway, 1998), and Uruguay (Light, 2011). In addition, there are overviews of organizations, such as the World Association of Community Radio Broadcasters, known as AMARC (Diasio, 2010), or specific groups such as Indigenous communities (Alia, 2004). Without going into specific details about each one, it is important to highlight some of their commonalities, differences, and, more importantly, what they say about funding.

Most of these studies outline the development of their country's community radio sector (see, for example, Cammaerts, 2009; Elliott, 2010; Forde, Meadows, & Foxwell, 2003). In terms of methodology, the majority include case studies of stations within the larger country case study. In Light's (2011) study on community stations in Uruguay, for example, he uses four stations from an initial corpus of twelve to highlight the diversity of radio within the country as a whole. Rosemary Day's (2009) work is another example where an overview of the practices of six stations in Ireland is described to provide examples of the larger context.

Despite using a similar methodology and describing a country's community radio history through a particular lens, these studies all have a different focus. Day (2009) focuses on stations' ability to facilitate participation, whereas Yasmine Smirès (2011) uses the Senegalese example to highlight the space provided to women on the airwaves. And although these cases serve as a testament to the breadth of experiences across nations and to the wonderful accomplishments of the sector, there are some stunning similarities when it comes to funding.

Studies that discuss funding all attest that it is scarce and that stations must resort to all kinds of creative fundraising activities. Tanya Bosch (2007), for example, describes a radio education workshop for children in South Africa funded mostly by donations with other funds generated through productions and space rentals. In describing the situation in Senegal, Smirès (2011) touches on problems, similar to those felt by Canadian stations, where funding is earmarked for programs and projects that are mostly limited in their duration. Senegalese stations are also dependent on advertising and donations to maintain technology, pay electrical costs, and remunerate staff (Smirès, 2011). Technology requires constant financing for stations, and it can be difficult to keep up to date with current trends and even to find funds to improve existing technology infrastructure. Even in Australia, where federal funding is available for community stations, Susan Forde, Michael Meadows and Kerrie Foxwell (2003) describe an unviable situation where stations are perceived as any other business, thereby disregarding the stations' mandate. This is felt in Canada, as well, particularly in the province of Québec, where funding requirements force stations to adopt a particular business model, structure, and even sound that resembles that of commercial stations. Each of these case studies basically recounts a story of radio being "forced to operate in the margins" (Cammaerts, 2009, p. 635).

Despite these various comments about funding or lack thereof, none of the studies consulted provide a sustained discussion on funding or provide empirical evidence gathered for this purpose. The World Association of Community Radio Broadcasters (AMARC) has been a pillar in engaging with community radio worldwide. As Francesco Diasio (2010) and others (Jankowski, 2003, for example) explain, AMARC assists with many policy-related issues, and it forges relationships, networks, as well as communities of knowledge and practice. Although funding is an important issue for most players in the sector, it is not an area that is heavily researched at an international level (with the exception of Coyer, 2011), most likely because of station- and country-specific particularities. However, that is not to say that this is not an issue that could benefit from further exploration. On the contrary, there is not an overview of funding structures from this sector that would serve to bolster a worldwide funding initiative. If anything, these studies demonstrate the precariousness of the sector, along with its high reliance on donations and the volatile nature of sustained funding.

Notwithstanding the breadth of research being conducted, the truth remains that the majority of empirical work aims at "describing and analyzing the organization and operation of stations in different contexts," (Gaynor & O'Brien, 2011, p. 23). This is something that Niahm Gaynor and Anne O'Brien (2011) maintain has to do with research in this field being mostly in its "first generation" (p. 24). It may also be that the originality of the studies prevents generalization. The lack of theoretical models, as described by Nicholas Jankowski (2003), may be another issue to consider. In Jankowski's article, he contends that research conducted on community media is not sufficient enough to derive any viable theoretical models to guide further empirical investigations.

In Canada, the review of existing literature has provided no indication of any academic research discussing the financial or technological situation of the sector. References are limited to various reports from the federal government (see, for example, Government of Canada, Standing Committee on Canadian Heritage, 2003), the regulator (see, for example, CRTC, 2017b), the provincial government (see, for example, Government of Ontario, 2011), consulting firms (see, for example, Cavanagh, 2009), or other civil society organizations (see, for example, Centime Zeleke, 2004) that often make submissions to the CRTC.

These reports generally offer an illustration of how the sector is doing based on examples or testimony from a variety of sources. The CRTC documents provide an overview of sector revenues and expenses in aggregated form, but no evidence of an in-depth analysis of particular elements is ever mentioned. Most of the reports indicate recommendations for financial improvement, such as providing a more robust policy for community radio (Government of Ontario, 2011), but there is little empirical evidence to support these claims and virtually no evidence of the actual value of the existing financial support, not to mention any formal indication of the scope of technological advancements in the sector.

To be quite frank, when discussing media funding in Canada, the discourse belongs to public radio, in other words, the Canadian Broadcasting Corporation (CBC). Studies about nonprofit radio in Canada are scarce. Most of the information available on the topic is buried in books providing general overviews of Canadian broadcasting (Armstrong, 2016) and it is often mentioned in texts about alternative media (Light, 2012). Tom Evans and Laurence Hauttekeete (2008) echo this sentiment and suggest the lack of studies related to "ownership, structure and market shares of local radio stations" (p. 102) is due to a lack of interest in community radio on behalf of policymakers and researchers. In reality, there has not been a call for discussions related to funding community radio outside the discussions at the CRTC that led to the creation of the Community Radio Fund of Canada. A recent book by Brian Fauteux (2015) called Music in Range does compile some of the scattered information on the sector, including historical information about the creation of community radio, and it also explains the most recent regulatory framework for the sector. Its main focus, however, is on music programming, which leaves many paths to be explored and questions to be answered. Despite some researchers' expectations, Canada does

not have an analogous situation to the United States when it comes to research. The available American corpus is far more robust when it comes to discussing public finances.

More recently, however, nonprofit media discussions have been on the rise, particularly in relation to ongoing issues of media concentration and ownership with regards to democracy and the diversity of voices in the media. This topic is also at the heart of a more recent cluster of publications related to the crisis of journalism (see, for example, Edge, 2014; Gasher, Brin, Crowther, King, Salamon, & Thibault, 2016; Winceck, 2010) that has resulted in newspaper closures and a wave of employment losses throughout the country. This has been pursued empirically by researchers such as April Lindgren, who has been tracking the loss of local news within a mapping project (Local News Research Project, 2019). Though these initiatives are not directly related to nonprofit media, they have included calls for improved funding of the nonprofit sector as a possible alternative to the current news crisis.

In the book *Alternative Media in Canada*, David Skinner (2012) suggests that there are three views on the sustainability of alternative media, which are known to be alternatives to mainstream media providers. Nonprofit, community, and campus stations are examples of alternative media in Canada. Skinner (2012) describes sustainability as "having the resources to acquire staff, technologies of production, and avenues of distribution, and to develop audiences" (p. 26). The first is that these media are "underdeveloped and generally doomed to remain marginal in the larger social context" (Skinner, 2012, p. 28). Although many of the studies presented here believe nonprofit radio is underdeveloped, they most likely do not believe that it is wholly relegated to the marginal context in which it sometimes finds itself. The second perspective suggests these media "as ebbing and flowing along with the social and political issues that give them form" (Skinner, 2012, p. 28). This seems to be a more realistic perspective of the media at hand. And, finally, the third perspective suggests the media are developing and their marginal status is an important issue, however, it "takes a more critical view of the larger social field in which these media operate and emphasizes addressing the power relations found there" (Skinner, 2012, p. 30).

However helpful in understanding sustainability perspectives, this is not an empirical study into the nonprofit radio sector and does not seek to find the underlying needs of the stations, which in the community radio sector have very little to do with offering an alternative news source to traditional daily news outlets, due to high production and personnel costs. The majority of stations work with a flow of volunteers. Nonetheless, some community radio stations do manage to offer news, but, generally, it is of another variety. Syndicated current affairs programming, such as the biweekly community radio news magazine *Groundwire* (see King et al., 2016), is more in line with what the nonprofit sector currently offers and is successful in delivering. Podcasting is also a new venue that is being explored, including by many Indigenous producers and artists (Albinati, Bonin-Labelle, Buddle, Gagnon, King, & Szwarc, 2019), however, these initiatives are outside the realm of traditional radio.

METHODOLOGY

This study is part of a larger project that included three phases of data collection. The first phase involved semi-structured recorded interviews with five representatives from select radio station associations in the country. These included the Alliance des radios communautaires du Canada (ARC) in Ottawa (Ontario), Missinipi Broadcasting Corporation in La Ronge (Saskatchewan), the Association des radios communautaires du Nouveau-Brunswick in Moncton (New-Brunswick), the Association des radiodiffuseurs communautaires du Québec (ARCQ) in Montréal (Québec) and the National Campus and Community Radio Association (NCRA) in Ottawa (Ontario). The interviews served as a means to develop relationships for future research partnerships, to confirm the project was consistent with the needs of the sector, and to ensure the best possible participation rate among member stations. The decision to interview people from these groups is consistent with anti-oppressive research that promotes time for relationship building and favours a commitment to creating change

from the research conducted (Potts & Brown, 2016). This approach is essential to study in this field, given its history and position among sectors, particularly in Canada. These interviews also yielded additional general information about management and financial reporting for their member stations, which serve as a benchmark for the additional data being collected through financial statements (phase 2). Finally, participants in phase two were invited to answer surveys about representation, governance, and technology at a later date (phase 3) to delve deeper into topics mentioned in the semi-structured interviews and to prepare for the future dissemination of the research within the communities as part of the principal investigator's commitment to foster change and dialogue within the sector based on the research outcomes.

Phase 2, which is documented in this article, involved contacting 183 stations managers who, to the best of our knowledge, represented the entire population of nonprofit licenced radio stations in Canada at the time of our research, to determine their interest in participating in the study. There may be a discrepancy in relation to the number based on the time the total number was calculated, category definitions used here, and the documents made available by the CRTC at the time of the count. Since, as previously mentioned, the CRTC does not always have an up-to-date tally of its licenced stations, this number represents the total number of stations noted through a detailed analysis of the CRTC website's list of stations, licences, and relevant documentation. Although in the United States, researchers can scan tax return forms, this is not the case in Canada. Very little information on nonprofit media organizations is public. The only financial statements available are those provided to the CRTC. So far, financial information provided to researchers has been in aggregated form through its monitoring reports or in aggregated form through formal requests, but it is never as specific as what stations provide nor is it as detailed as a formal financial report. Some nonprofit organizations, such as Powered by Data or Sector Source, have assisted researchers and government departments to make their data more accessible, but this does not guarantee the data is made available. So far, the only source for CRTC information is what is provided on its website or through its monitoring reports. Consequently, this study relies on the voluntary disclosure of financial statements provided by the radio stations themselves. In total, 62 station managers voluntarily supplied the research team with their consent forms and financial statements for the three years between the beginning of the program in 2012 and 2015. These documents became the main objects of analysis for this phase.

The documents were analyzed thematically based on the categories of regular financial statements and the various fundraising subcategories (for example: bingo, art auction) were coded to better understand the language being used to document finances in the sector.

A database of the data was then created using Microsoft Excel to allow for an overall analysis of the sector. Data was then aggregated for analysis to avoid identifying individual stations as an agreement of anonymity was required. The results relevant to the topic at hand are presented in the next section.

RESULTS

As can be observed throughout the tables, the sample size is not always consistent. This is because some of the reporting stations were unable to provide their financial statements for every year being studied. Consequently, the average, median, and standard deviation are provided where possible to compare the stations among themselves and a specific station's situation from one reporting year to another. Otherwise, the tables demonstrate the data aggregated by region for all the stations reporting in the sample. To maintain anonymity, the comparative tables detailing the data for stations that have benefited from grants for projects involving technology were aggregated for the country as a whole. Failure to do this would have resulted in the possibility of identifying some stations due to the small number of stations within the sample that have received funding.

Revenues

Revenues for the entire sample remain generally stable year over year, with the difference between the averages of $11,795 to $13,217. The year reporting the best revenues is 2013 with an average of $252,315 (see Table 1).

Table 1. Average, median, and standard deviation of revenues and expenses for all nonprofit radio stations benefiting from funding for technology projects

	2012		2013		2014		2015	
	Revenues	Expenses	Revenues	Expenses	Revenues	Expenses	Revenues	Expenses
Canada	241,141 (41)[1]	232,630	252,315 (57)	237,298	239,098 (59)	241,626	227,303 (31)	220,247
Median	175,683	173,571	152,241	145,174	132,199	166,420	174,609	160,607
Standard Deviation	238,478.59	227,164.12	309,620.67	303,577.02	310,083.60	307,305.46	194,221.86	190,372.49
Average	215,045 (14)[2]	195,930	291,897 (20)	273,460	255,829 (22)	276,378	207,255 (9)	190,296
Median	206,736	173,571	185,428	177,183	151,692	175,358	202,846	183,200
Standard Deviation	142,352.62	128,377	388,169.02	395,829.38	376,957.60	390,998.80	102,137.84	99,645.29

Notes: 1) Sample size for every specific year. The sample is built on the total revenues listed in the revenue categories listed in the statements of operations section of the financial statements provided for the study. 2) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations section of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of revenues for the entire period.

The average revenue for the subsample of stations that benefited from the CRFC grants aiding technology projects are more wide-ranging. The difference between averages varies in increments of $76,852, $36,068, and $48,574. As for the entire sample, the best reporting year is 2013, where the average lies at $291,897 (see Table 1). In both cases, 2015 was the worst reporting year, following a steady decline through 2014. The entire sample reported $227,303 for 2015, while the stations that received funding for technology projects averaged $207,255. Although the CRFC does not have a mandate to fund technology, it has, inadvertently, aided in funding these types of initiatives by the types of projects funded. Technology projects, for the purpose of this study, represent any kind of initiative involving technology, from upgrading technology to using technology to modernize a specific task or activity. For example, digitizing a music collection could be a technology project.

Table 2. Breakdown of revenue categories of all participating nonprofit radio stations in Canada

	2012 (41)[1]	2013 (57)	2014 (59)	2015 (31)
Student contributions	1 (21.4%)	1 (22.4%)	1 (21.3%)	1 (27%)
Advertising	2 (16.4%)	2 (20.2%)	2 (20.4%)	4 (10.6%)
Donations[2]	3 (12.4%)	5 (7%)	5 (10.3%)	
Miscellaneous/other[3]	4 (11%)	4 (9.7%)	4 (11.7%)	5 (9.3%)
Grants	5 (10.7%)	3 (15.6%)	3 (16.1%)	2 (14.1%)
Fundraising				3 (13.3%)

Notes: 1) Sample size for every specific year. The sample is built on the revenue categories listed in the statements of operations section of the financial statements provided for the study. 2) The categories mentioned here reflect the uses noted by the stations in their statements of operations. 3) Includes both the amounts indicated under the Miscellaneous category in the statements of operations, as well as the amounts undisclosed by stations that did not break down their revenues in their financial statements.

However, the CRFC (2019) only allows five percent of a total grant to be spent on technology and does not promote grants for technology funding purposes.

Aside from the CRFC grants, stations have reported financing their operations through a variety of activities. Although the level of diversity was interesting, the top five categories reported for each year always amounted to around 70 percent of total station revenues (see Table 2). The main revenue categories were also relatively stable and included student contributions, advertising, donations, grants, and categories disclosed as "miscellaneous—other." Only in 2015 are the top five categories different, with donations being swapped out for fundraising initiatives. Student contributions and advertising revenues regularly account for more than 20 percent of total revenues for campus stations.

When looking specifically at stations that have received funding for a technology project, the situation is somewhat different, as there are more categories that find their way into the top five (see Table 3). The same six mentioned earlier (student contributions, advertising, donations, miscellaneous/other, grants and fundraising) for the entire sample are still present, but they are joined by the membership and sponsorship categories, although these two only become relevant in 2015. This subsample also displays a greater concentration of the revenues through its top categories. A 70% revenue concentration of the full sample changes to over 80 percent of the revenue coming from the top categories. Student contributions make up the most important part of these revenues, as they represent

Table 3. Breakdown of top five revenue categories for participating nonprofit radio stations benefiting from funding for technology projects

	2012 (14)[1]	2013 (20)	2014 (22)	2015 (9)
Miscellaneous[2]	1 (27.7%)	4 (10.6%)	3 (17.5%)	
Student contributions[3]	2 (26.5%)	1 (34%)	1 (29.4%)	1 (45.8%)
Grants	3 (10.9%)	2 (17.2%)	2 (18.5%)	2 (15.7%)
Donations	4 (10.1%)	5 (8.1%)	5 (6.6%)	
Memberships	5 (6.4%)			
Advertising		3 (10.7%)	4 (14%)	4 (9.4%)
Fundraising				3 (11.8%)
Sponsorship				5 (4.4%)

Notes: 1) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations section of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of revenues for the entire period. 2) The categories mentioned here reflect the uses noted by the stations in their statements of operations. 3) Includes both the amounts indicated under the Miscellaneous category in the statements of operations, as well as the amounts undisclosed by stations that did not break down their revenues in their financial statements.

Table 4. Average portion of total revenues coming from grants for all participating nonprofit radio stations by region

	2012	Sample[1]	2013	Sample	2014	Sample	2015	Sample
Atlantic[2]	7.56%	9	14.47%	12	14%	12	12.94%	3
Québec	31.1%	7	29.51%	7	31.4%	7	30.74%	5
Ontario	2.75%	9	9.7%	16	9.89%	15	13.27%	8
West[3]	7.88%	16	16.73%	22	15.94%	25	9.28%	15
Total		**41**		**57**		**59**		**31**
Average	10.65%		15.56%		16.4%		14.13%	
Median	2.14%		6.11%		7.11%		4.68%	
Standard deviation	18.61		22.73		20.72		20.5	

Notes: 1) Sample size for every specific year. The sample is built on the grants category (also named bursaries in some instances) included in the statements of operations section in the financial statements provided by the participating stations for the study. 2) The Atlantic region includes the provinces of Newfoundland and Labrador, Nova Scotia, New Brunswick, and Prince Edward Island. 3) The West region includes the provinces of Manitoba, Saskatchewan, Alberta, and British Columbia, as well as the territories of Yukon, Nunavut, and the Northwest Territories.

between 26.5 percent and 45.8 percent of the total, while the other categories mostly remain stable before declining or leaving the top five in 2014 and 2015.

Grants, the majority of which are restricted to particular programs, are one of the main sources of revenue for nonprofit stations. However, they are unequally distributed across Canada (see Table 4). Grants consistently account for the largest portion of revenues for stations from the province of Québec. They receive around 30 percent of their revenues from grants as opposed to a modest 10 percent for the rest of Canada. As previously mentioned, these stations receive an operating grant from the government of Québec (Culture et Communication Québec, 2016; Lévesque, 2018). The years 2013 and 2014 represent the most significant grant revenues in this region, about 16 percent of the total, which is up five percent from 2012. Of importance is the standard deviation, which remains around 20 for the entire period studied. This widely separates the most and least favoured stations.

In the case of stations having received money for technology projects, the most important years are also 2013 and 2014 (see Table 5). Compared to the entire sample, these stations did slightly better with their total grant revenues hovering around 18 percent, while 2012 and 2015 happened to be similar to the entire sample situation at around 11 percent and 14 percent, respectively. The subsample increased by seven percent in grants from 2012 to 2013. Nonetheless, similar to the entire sample, the standard deviation, except for 2012, is still 20.

Table 5. Average portion of revenues for stations with technological improvements subsidized by the CRFC through the Radiometers grants compared to the entire sample of stations

	2012	2013	2014	2015
Canada	10.65% (41)[1]	15.56% (57)	16.4% (59)	14.13% (31)
Average	10.87% (14)[2]	17.17% (20)	18.54% (22)	13.68% (9)
Median	3.34%	10.33%	14.06%	0.58%
Standard deviation	15.99	23.01	22.69	20.86

Notes: 1) Sample size for every specific year. The sample is built on the grants category (also named bursaries in some instances) included in the statement of operations section in the financial statements provided by the participating stations for the study. 2) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations section of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of revenues for the entire period.

Table 6. Breakdown of the top five expense categories for participating nonprofit radio stations

	2012 (41)[1]	2013 (57)	2014 (59)	2015 (31)
Salaries[2]	1 (46.3%)	1 (43.9%)	1 (43.1%)	1 (40.8%)
Miscellaneous[3]	2 (31.8%)	2 (34.2%)	2 (35.5%)	2 (38.2%)
Utilities[4]	3 (11.1%)	3 (10%)	3 (7.8%)	3 (10.8%)
Amortization	4 (3.7%)	5 (3.3%)	4 (5%)	4 (4.5%)
Telecommunications	5 (3.2%)	4 (3%)	5 (3.8%)	5 (2.2%)

Notes: 1) Sample size for every specific year. The sample is built on the revenue categories listed in the statements of operations section of the financial statements provided for the study. 2) The categories mentioned here reflect the uses noted by the stations in their statement of operations. 3) Includes both the amounts indicated under the Miscellaneous category in the statement of operations, as well as a number of categories for which values were too small to be rounded up to a significant decimal and expense amounts undisclosed by stations. 4) The Utilities category was aggregated from the data listed under the "electricity," "postage," office supplies," heating," and "furniture" categories listed in the statements of operations.

Expenses

Expenses present more significant variations. From 2012 to 2014, the average expenses for the entire sample increased from one year to the next, but between 2014 and 2015, the average expenses dropped by $21,379 (see Table 1). This reality was more prominent for the subsample of stations receiving funding for technological projects, as the variation of the average total expenses mirrored that of the total rev-

enues discussed earlier. Expenses dramatically increased by $77,530 for these stations from 2012 to 2013, before dropping $86,082 from 2014 to 2015. Such variations were not found in the compilation of the top five categories of expenses reported by these participating stations. Similar to the total revenues, the top five expense categories remain quite static for the entire period studied. Salaries, miscellaneous, utilities, amortization, and telecommunications make up the list, with salaries never letting go of the top spot or dropping below the 40 percent mark (see Table 6). These expense categories also end up totalling over 90 percent of the expenses reported by the participating stations.

The situation is somewhat similar when analyzing the top five expense categories of the stations making up the subsample (see Table 7). The categories remain the same except for the complete disappearance of the telecommunications category, which is replaced by insurance in 2012, 2013, and 2015, and by professional expenses in 2014. These main expense categories make up the bulk of the total expenses of the stations; they add up to around 90 percent for the entire period studied. Of those categories, salaries have the biggest impact, making up as much as 50 percent of total expenses in 2012 and 2013 before declining slightly to 42 percent in 2015.

Surplus and deficit

The financial landscape would not be complete without a picture of the debt carried by nonprofit radio stations. Concerning the main sample, the situation remains stable from 2012 to 2015. Deferred revenues and accounts payable remain the two main categories in this regard, adding up to anywhere between 47 percent and 66 percent

Table 7. Breakdown of the top five expense categories for participating nonprofit radio stations benefiting from funding for technology projects

	2012 (14)[1]	2013 (20)	2014 (22)	2015 (9)
Salaries[2]	1 (52%)	1 (51.1%)	1 (46.1%)	1 (41.9%)
Miscellaneous[3]	2 (26.6%)	2 (32.5%)	2 (36.8%)	2 (39.3%)
Utilities[4]	3 (10.8%)	3 (5.9 %)	3 (7.3%)	3 (10.2%)
Amortization	4 (4.3%)	4 (3.5%)	4 (4.6%)	4 (4%)
Insurances	5 (2%)	5 (1.8%)		5 (1.7%)
Professional expenses			5 (1.8%)	

Notes: 1) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of expenses for the entire period. 2) The categories mentioned here reflect the uses noted by the stations in their statement of operations. 3) Includes both the amounts indicated under the Miscellaneous category in the statements of operations, as well as a number of categories for which values were too small to be rounded up to a significant decimal and expense amounts undisclosed by stations. 4) The Utilities category was aggregated from the data listed under the "electricity," "postage," office supplies," heating," and "furniture" categories listed in the statements of operations.

Table 8. Breakdown of the debt situation of all participating nonprofit radio stations

	2012 (41)[1]	2013 (57)	2014 (59)	2015 (31)
Deferred revenue[2]	1 (33%)	2 (24%)	1 (25%)	1 (41%)
Accounts payable	2 (30%)	1 (31%)	2 (22%)	2 (25%)
Long-term debt	3 (14%)	3 (13%)	3 (19%)	3 (11%)
Bank loan	4 (7%)	5 (5%)		5 (4%)
Loan without interest payable upon demand	5 (3%)		5 (8%)	
Portion of long-term debt renewable within one year		4 (11%)	4 (10%)	
Portion of long-term debt reimbursable within one year				4 (8%)

Notes: 1) Sample size for every specific year. The sample is built on categories included in the statements of financial position listed in the financial statements provided by the participating stations for the study. 2) Deferred revenues are coming from different sources that include: student fees that are earned but have not been paid because of the way fiscal years are set, advertising revenue that was not yet paid once the fiscal year ended, and grant funding, depending on how the grant is to be paid (e.g., a portion given at the start of a project and the rest upon completion).

of the debt load per year (see Table 8). In addition to these two short-term categories, there is the long-term debt in third place, which experienced an eight percent variation throughout the study period. The categories taking up fourth and fifth places vary between bank loans, loans without interest payable upon demand, long-term debt renewable within the year, and a portion of long-term debt reimbursable within one year.

The subsample presents more significant variations from year to year. From 2012 to 2015, there are 11 different debt categories reported, with accounts payable and deferred revenue being the only categories present in every instance (see Table 9). These two categories make up most of the debt; they account for 40 percent to 61 percent of the total debt during the study period. The only exceptions are in 2013 and 2014, where the "portion of long-term debt renewable within one year" takes the top position, with 38 percent and 33 percent, respectively. This mirrors the appearance of the long-term debt category in fourth place. Both do not appear in 2012 and 2015.

Table 9. Breakdown of the debt situation of all participating nonprofit radio stations benefiting from funding for technology projects

	2012 (14)[1]	2013 (20)	2014 (22)	2015 (9)
Account payables	1 (37%)	2 (33%)	2 (24%)	1 (37%)
Deferred grants	2 (12%)			
Deferred revenue[2]	3 (12%)	3 (7%)	3 (19%)	2 (24%)
Current portion of bank loans	4 (5%)			
Loan without interest payable upon demand		5 (4%)	5 (5%)	
Portion of long-term debt renewable within one year		1 (38%)	1 (33%)	
Deferred revenue from real estate				
Long-term debt due to related parties			4 (7%)	3 (10%)
Bank loan	(17%)	(6%)		(15%)
Current portion of bank loans				4 (8%)

Notes: 1) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations section of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of revenues for the entire period. 2) Deferred revenues are coming from different sources that include: student fees that are earned but have not been paid because of the way fiscal years are set, advertising revenues that were not yet paid once the fiscal year ended, and grant funding, depending on how the grant is to be paid (e.g., a portion given at the start of a project and the rest upon completion).

Table 10. Surplus and deficit of all participating nonprofit radio stations by region

	2012		2013		2014		2015	
	Surplus[1]	Deficit	Surplus	Deficit	Surplus	Deficit	Surplus	Deficit
Atlantic[2]	3	6	5	7	6	6	2	1
Québec	2	5	3	4	4	3	3	2
Ontario	5	4	11	5	13	2	8	0
West[3]	14	2	19	3	19	6	13	2
Total	**24**	**17**	**38**	**19**	**42**	**17**	**26**	**5**

Notes: 1) Surpluses and deficits were calculated based on the difference between total revenues and total expenses declared in the statements of operations section of the financial statements. 2) The Atlantic region includes the provinces of Newfoundland and Labrador, Nova Scotia, New Brunswick, and Prince Edward Island. 3) The West region includes the provinces of Manitoba, Saskatchewan, Alberta, and British Columbia, as well as the territories of Yukon, Nunavut, and the Northwest Territories.

Aside from the debt situation, there is the question of year-to-year operations. When analyzing Table 10, it is possible to observe that the ratio between all stations experiencing a surplus and those dealing with a deficit (all stations combined) declines progressively from close to one-to-one all the way to five-to-one, leaning in favour of the surplus. The western region stands out the most because, except for 2014, there are never more than two stations in deficit. This is not the case in Eastern Canada, where the Atlantic Provinces and Québec only get back to a positive ratio from 2014 onward. Of note is the 2015 situation for Ontario, when none of the eight participating stations are in a deficit.

Finally, the surplus and deficit landscape for the subsample shows a positive situation. There are almost twice as many stations experiencing a surplus than a deficit (see Table 11). The year 2013 was the worst in the sample. Indeed, the situation improves through 2014 and 2015. Concerning the latter year, only one station of the subsample is in deficit.

Table 11. Surplus and deficit of all participating nonprofit radio stations benefiting from funding for technology projects

	2012		2013		2014		2015	
	Surplus[1]	Deficit	Surplus	Deficit	Surplus	Deficit	Surplus	Deficit
Total	11	3	12	8	15	7	8	1

Note: 1) Sample size for every specific year. The sample is built on both the stations that received funds for technology projects from the Radiometres program and the revenue categories listed in the statements of operations section of the financial statements provided for the study. Every station that received funding during the 2012 to 2015 period is included in the sample in order to analyze the evolution of revenue for the entire period.

DISCUSSION

Nonprofit radio is one of the most important sectors in radio as it "gives voice to the voiceless, … serves as the mouthpiece of the marginalized and is at the heart of communication and democratic processes within societies" (Fraser & Restrepo Estrada, 2001, p. iii). However, it is surprising how little attention the sector has been given in academic research. And, as was stated in a UNESCO (Scarone Azzi & Sánchez, 2003) report on community radio broadcasting legislation, since Canada's community stations are a recognized part of the broadcasting system, any new regulatory developments should take into account the challenges the sector faces, including new technologies and "if they are to really meet the needs of the sector [these], must be adapted to technical, cultural and political changes" (p. 106). This study sought to do just that in determining how the current provisions for technological financial support through the CRFC grants have fared. In so doing, it was possible to compare the value of this funding for long-term sustainable technological plans among stations that received funding as opposed to those that did not.

This study demonstrates that there was no significant impact on revenues due to the funding stations received through the CRFC. However, the grants received did have an impact on expenditures. Stations that received a grant were more likely to invest in long-term projects that cost much more than what was covered by the grants obtained. They were also much more likely to finance themselves through long-term loans they could renew within a year. This gave them the opportunity to wait for their funding or attempt to find other revenues. Consequently, this demonstrates that the expenses would have been incurred whether the grant money was received or not and that the technological projects were required, this despite the fact that the CRFC only accounts for five percent of a station's budget toward new technology. That said, stations would have had to find money for the technological projects whether or not they were successful with their grant applications. This situation seems to be related to the income effect. When a person's income increases, so does their discretionary income. With this discretionary money, the person is able to choose to buy more of the same goods, more expensive goods, or something else (known as the Slutsky substitution effect (Income Effect, 2011). When this income

decreases, the person can choose to buy cheaper goods or less goods (Income Effect, 2011). Following this logic, it is presumable that stations that did not obtain the grant would probably have gone through with their projects, but possibly on a smaller scale or using cheaper technological options, as they must keep up with technological demands. To be sure, however, further interviews with participating stations would be required. Those that obtained the grant were most likely able to pursue projects with better materials and on a larger scale, based on the evidence provided in the financial statements.

In terms of expenses, it was also noted that as stations started to become emboldened in their spending, they tended to have more expenses related to professional fees. In 2013, the Canadian Not-for-profit Corporations Act (Canadian Ministry of Justice, 2009) was modified. An organization that receives income of more than $10,000 from public sources is considered to be soliciting. Depending on its revenues, this organization may have to maintain audited financial statements or even retain professional accounting services (Hennessy, 2013; Welch LLP, 2017). This could be one of the reasons why some stations began spending on professional services. However, it could also be because they had requirements from their bank in order to receive a loan or simply because the sector as a whole is moving toward a more professional model. This model increasingly needs professionals, such as accountants, and audited statements in order to access money from investors, or even to solicit donations from everyday citizens who are now better informed about organizations because of the internet.

In terms of sustainability, this study has demonstrated that most stations continue to rely on grant money rather than finding ways of becoming sustainable. Grants in this study seem to have a disincentive effect. In receiving grants, stations with stable revenues did not seek out additional money. Out of the 108 stations that received funding through the Radiometers grant competition, only 28 had applied for funding once during the 2012–2015 period. All other stations have applied at least twice, which suggests that the current system is not allowing for stations to become sustainable.

Matching funds could assist in this problem, however, the sector would need to be cautious about where the initial money is obtained. As a study by Brooks (2000) demonstrates, there is a strong relationship between how much people are willing to give based on the sector and the type of subsidy involved. In this case, it would be difficult to determine the exact effects because the CRFC is technically not made up of “real” public money but rather money from the commercial sector and well-to-do stations that is funnelled to the nonprofit sector by means of the regulations of a public agency (the CRTC). It is difficult to tell how this complicated arrangement could be made clear to the average person or organization for marketing purposes.

In trying to explain why some stations were more successful than others in securing funds, it was revealed that nine out of the 22 stations in the sample that received funds from the Radiometers competition for projects with technological components were student stations. Overall, 22 student stations participated in the study. Therefore, 41 percent of these stations (9 out of 22) have received funding in comparison to 32.5 percent (13 out of 40) of regular community radio stations. One would need to analyze the actual applications for funding to determine what factors could explain the advantage of campus stations. It would also be beneficial to document arguments used to attribute the funds during the closed-door meetings of grant adjudicators.

LIMITATIONS AND FURTHER RESEARCH

It would have been helpful to have financial statements for all years being reported for the sample population or even better for the entire population. However, since the CRTC does not make financial statements public, even though all stations must provide them, and since nonprofit stations are generally run by volunteers, the research team was forced to work with what it had. It took more than a year to obtain the financial statements alone. Having all the statements

would have provided a more accurate illustration of the financial situation of stations benefiting from grants for technological projects. Further research involving a longitudinal study would be interesting to determine, for example, how many times a station applies for grant money over a ten-year period, what it does with this money, and how this impacts its financial health over time. It would also give the CRFC a better indication of the value and uses of its competitions.

It would also be relevant to compare the disincentive effects of the grants with other types of grants by adding a matching funds option, to closely monitor the relationship between loans and grants to find the best situation, and to examine how the nonprofit radio industry fares in comparison to other cultural industries or another sector of nonprofit organizations to improve related policies. Such studies are already being considered in other areas, such as foreign aid to reduce poverty (Inge & Conceição, 2011).

CONCLUSION

Conducting this study allowed the creation of an overview of funding through the lens of community media, which provided a means to observe several financial behaviours that can serve as best practices for other nonprofit stations from Canada and abroad. First, although grant money does give stations a boost in the short-term, station managers should think about how this money could be used to benefit stations in the long-term. They should ask themselves if the projects are sustainable on a long-term basis or if short-term investments will provide long-term benefits for the station. By seeing how the grant money can be used to foster long-term objectives, stations should better manage this money and make better decisions when applying for funds.

Second, although the CRFC currently does not require stations to obtain matching funds to receive a grant, stations would benefit from this exercise every time they apply for money. Although the risks for using matching funds have been noted, there are three ways they could provide an incentive for the stations. First, it would allow them to engage in more substantial projects than those possible using only grant money. Second, it would force organizations to obtain feedback about projects in which they are trying to invest. If potential investors are not enthralled by the ideas put forth, it might be that the project is not that exciting or useful. These investors might also provide other ideas that could be of better value to the stations. Finally, matching funds may allow for greater accountability because there are other partners invested in the projects.

All in all, this study shows that nonprofit stations manage to invest in technological projects with or without grants. Since it is not clear what the technological future holds, however, it is difficult to determine if these investments are substantial enough to ensure stations keep up with technology. Long-term financial planning needs to be at the forefront of station management and only further studies would reveal if current governance structures support this type of planning.

NOTES

1. The CRTC is the Canadian regulatory body for broadcasting and telecommunications. It is an agency at arm's length from the government.
2. The National Campus and Community Radio Association (NCRA), the Alliance des radios communautaires du Canada (ARC du Canada), and the Association des radiodiffuseurs communautaires du Québec (ARCQ).
3. Canadian content development comprises contributions from the commercial and ethnic radio broadcasters earning more than $1.5 million in annual revenues to "initiatives that aid in the development and promotion of Canadian musical and spoken word content for broadcast" (CRTC, 2014).
4. These reports are produced annually. They include aggregated financial information about each media sector and provide an overview of the health of the broadcasting and telecommunication industries. They do not include detailed methodology about how numbers are calculated nor are they necessarily produced the same way each year. In other words, it is very difficult to compare them from one year to the next as the information provided varies widely.

5. Although one might expect several government sources to be available to describe the broadcasting sector in Canada, the reality is quite the opposite, especially for the nonprofit sector. A few associations represent member stations, but they only have information on their members and generally only publicly share it with them. The CRTC produces the annual monitoring report, but it does not conform to the same format every year nor does it always contain the same information. Therefore, it is difficult to have a perfect picture of the industry. Also, data on the commission's website is not always up-to-date given its small number of personnel. Statistics Canada also stopped generating data on radio for more than a decade.
6. It would have been ideal to provide geographical information on these stations, but the only resource available is a list generated on the CRTC's website. At writing time, however, it had not been updated since February 2017.
7. In Canada, a college refers to an institution where students receive vocational or technical education for professions such as chef, police officer, hair stylist, or veterinary technician.
8. We have not opted for the "non-commercial radio" designation now used by the CRTC in its last monitoring report as religious stations are not included in this dataset.
9. The Hamelin Line (or the 55th parallel) is a geographic line that is used by the Canadian government to differentiate between Indigenous communities in the north and those in the south. Stations in the north are eligible for funding, whereas those in the South are not. Bruce Girard's (1992) book provides another example of a collection of overviews and case studies from a variety of countries.

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My Life and My Work, in Brief[1]

Jack Quarter

FOREWORD

Jack Quarter passed away on February 6, 2019, after a brief illness. Jack was always generous with his time and would offer support to anyone who had the occasion to speak with him. While many have primarily known him by his research and theory building concerning the social economy, his path and what has influenced him are less clear. In December 2018, Dale Willows (his partner of 32 years) and I encouraged him to write a brief autobiography, and what appears below is the outcome.

Upon reading his words, I felt that Jack's journey contains much to learn from and is quite forward–thinking in many respects. Thus, rather than providing an in memoriam in this issue, I offer the reader this opportunity to learn about his path. I encourage you to ask yourself a few questions as you read this brief autobiography: How did you become interested in social economy and nonprofit studies or research? How has your current work and perspective been influenced by your path? Jack was never shy to share parts of his history, and it is a privilege to be able to share a part of his story with you.

AVANT-PROPOS

Jack Quarter est décédé le 6 février 2019 à la suite d'une brève maladie. Jack était toujours généreux de son temps et il offrait son appui à toute personne ayant l'occasion de converser avec lui. Plusieurs l'ont connu principalement par sa recherche et sa formulation de théories en économie sociale sans forcément savoir quel était son parcours et ses influences. En décembre 2018, Dale Willows (son partenaire pendant 32 ans) et moi l'avons encouragé à rédiger une brève autobiographie. Il en a résulté le texte que vous voyez ci-dessous.

En lisant ses paroles, j'ai senti qu'on peut en apprendre beaucoup en suivant le parcours—visionnaire à bien des égards—que Jack a suivi. Conséquemment, plutôt que d'inclure une eulogie dans ce numéro, j'offre aux lecteurs et lectrices l'occasion d'en apprendre un peu sur son parcours. Pendant votre lecture de cette brève autobiographie, je vous encourage à vous poser quelques questions: qu'est-ce qui vous a motivé à vous intéresser aux études ou à la recherche sur les organismes sans but lucratif et l'économie sociale? Comment votre propre parcours a-t-il influencé vos perspectives et votre travail actuels? Jack n'a jamais reculé devant le partage de son histoire, et c'est pour moi un privilège de pouvoir partager le texte suivant avec vous.

Jorge Sousa
November, 2019

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I come from a very unusual background. My school beginnings were on the rough side. If it were not for a psychologist armed with an IQ test, I might still be in kindergarten. However, things picked up from there, and I was only 12 when I entered Harbord Collegiate Institute, my age being a mixed blessing as I was immature.

My family had two religions, Judaism, which was primarily a cultural activity (e.g., attending Camp Yungvelt), and Communism, which was the real thing. When other Jewish boys were preparing for their Bar Mitzvahs and learning text such as Barukh ata Adonai Eloheinu, melekh ha`olam, I was reading a book that started with, “A spectre is haunting Europe — the spectre of communism,” (Mark, 1954, p. 8). and ended with, “The proletarians have nothing to lose but their chains. They have a world to win. Workers of the world, unite!” (p. 54).

In my family, Marxism was serious stuff. In the 1920s, my aunt, uncle, and cousin returned to Moscow to be part of the revolution. (Your eyes are not playing tricks on you.) When Joe Stalin died, my grandfather was slumped over his radio, listening to the broadcast, disconsolate, with tears streaming down his face. I was 11 years old and trying to make sense of the conflicting signals from the world around me and my family.

As a young lad, Judaism and Communism seemed radically different, but as I matured it became apparent that they were much the same: one prophesizing a heaven after earth for adherents and the other prophesizing heaven on Earth, and even more so believing that Marx, the prophet who ironically came from a lengthy rabbinical tradition, had proven scientifically how heaven on Earth would come about. Both were faith-based systems, and both were rife with dogmatism, especially if taken seriously.

My father was a heroic figure in my life, especially in my formative years; he was a dress cutter and labour organizer, was critical of Stalinism, but maintained the faith as a Trotskyist. Nevertheless, there was a pragmatic side to him, and in his later life he was primarily a social democrat. My dad worked long hours and attended union meetings following work, but he always made time for my brother and myself. I relished our chess games. Saturday afternoon at 1 p.m. was opera time and time for me to head out, but some of it stuck, as I now enjoy the opera.

I credit Peter Russell, a brilliant young lecturer at the University of Toronto (U of T) in my first course in political science, with helping me to understand that there were middle ways in politics and not everything need be reduced to extremes. I was searching, needing ideals, and was a bit unhinged. At first the study of psychology, Freud, and Fromm became an escape, and I completed an MA in social psychology at the U of T, after turning down an offer from the U of T Law School. I did my PhD at the Ontario Institute for Studies in Education (OISE) at the U of T, with a thesis on the student movement of the sixties, which was published as a book in 1972, the year my daughter, Zoey, was born.

However, I was still searching. I had a yen, a human yearning to see a better way. In 1980, I had a sabbatical from my faculty position at OISE and took the unusual step of living on a kibbutz, a utopian communal system in Israel that I had studied and wanted to learn more about. It also gave me a chance to introduce my children to a secular form of Judaism, apart from religious worship. This was a life-changing experience for me, as I was introduced to a form of co-operative that seemed to work and offered its members a good standard of living and a good quality of life. It also gave my family and me an opportunity to experience Judaism as a living culture without all the religious baggage.

One of the most astonishing observations for me when we arrived at the kibbutz was the restlessness of the younger generation. While the founders believed they had created heaven on Earth, their children were searching for change, and in doing so were encouraged by their elders; the elders urged them to travel and see the rest of the world, believing they would return because the kibbutz was such a superior society. I wrote several papers on the topic, including

"Intergenerational Discontinuity in the Israeli Kibbutz." (Quarter, 1984). The kibbutz was an open society with an educational system that emphasized individual choice, and it resulted in fundamental changes to its communal structure, something that I later wrote about in the book *Crisis in the Israeli Kibbutz*, which I edited with my dear colleagues and friends Uri Leviatan and Hugh Oliver. (Leviatan, Quarter, & Oliver, 1998)

One observation that stuck with me from our stay at Kibbutz Ein Hamifratz was that when the assembly line for the huge agricultural carton factory broke down, the workers would rush to fix it. I had worked on assembly lines during summer jobs, and when the line broke, the religious among the group would look skyward and offer a large thank you. No one rushed to fix it. I felt that I was witnessing a new model of work, and when we returned to Toronto, I immersed myself in the study of co-operatives and particularly worker co-operatives, firms that were owned in common and democratically managed by their employees.

My interests were not simply about democratic forms of work management but also about how wealth could be distributed more equitably, not only using government policies but also through firms, pensions, and union initiatives. My interests gradually expanded, and I began to see co-operatives as part of a wider social sector: the social economy. As I studied more, I became astonished at how broad Canada's social economy was and that co-operatives were such a small piece of it. The beginning of this work was my 1992 book, *Canada's Social Economy: Co-operatives, Non-profits and Other Community Enterprises*. The book was the first comprehensive portrait of Canada's social sector.

A consistent theme running through this work is that our economy is mixed, and the organizations in the social economy interact with the private and public sectors in differing ways. We used a Venn diagram to portray these differing interactions. Some secondary themes sprang from this research, such as a strong interest in volunteering and how to measure it, led by my colleague Laurie Mook of Arizona State University. One of the greatest pleasures in my work is sharing with past and current students. I have been blessed by the students who have found me, and they have greatly enriched my life. Many now teach at universities in Canada and the United States. I have been fortunate.

A common denominator in my work is faith in a better way, possibly a form of religious belief, but one that gives my life's work meaning. One of my struggles in life and in my work has been to maintain a balance between idealism and pragmatism. To this I credit my beloved partner of 32 years, Dale Willows, who has modelled for me how this could be done. We share many of the same ideals, but she has helped me to stay balanced and carefully consider evidence before formulating opinions. Part of my motivation for doing this is to try and model that balance for my beloved son, David, of whom I am very proud.

My life has been about much more than work. I have derived immense pleasure from riding my bicycle along the Galloping Goose Trail on Vancouver Island; I enjoy losing myself in a bridge game, usually on Sunday evenings, though I sadly lost my bridge partner and longtime friend, Hugh Oliver. I can lose myself in a good book, particularly political biographies, and enjoy music of all sorts, with a special nod to Leonard Cohen, perhaps because like me he sings off-key. I have been blessed with a loving family and a strong circle of friends.

I write this at age 77, struggling with advanced stomach cancer and an uncertain future. Like most people I have some regrets: not knowing my mother; my daughter's death at age 34 from breast cancer; not having children with Dale Willows. I dabbled with creative writing at various points, writing a play, *Reflections of a Well-Conditioned Madman*, that the BBC put on in 1979 (Quarter, 1979). I would have liked to publish that great novel, but I never did. Nevertheless, I have been very fortunate in my life—personal and work—and hope that I have contributed in some small way. In spite of the many problems in this world, I remain hopeful that people will find a better way.

Jack Quarter, January 2019

NOTE

1. This piece was written by Jack Quarter and appears on a website that was created in his memory, www.jackquarter.org, which you are encouraged to visit. The content contains minor edits for style and publication.

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The Sustainable Development Goals: A Tipping Point for Impact Measurement?

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ABSTRACT

This article proposes a holistic framework of integrated social accounting that could be adopted by all types of organizations in the social economy, as well as in other sectors. The impetus for this derives from the popularity of the sustainable development goals (SDGs) and the broadening of collective impact thinking. The article advances a model of integrated social accounting that brings together four dimensions: 1) resources/capitals, 2) value creation/destruction, 3) internal systems and processes, and 4) organizational learning, growth, and innovation. Organizations using this model focus on the implications of their activities through the lens of the SDGs, looking both internally and externally.

RÉSUMÉ

Cet article propose un cadre global de comptabilité sociale intégrée qui pourrait être adopté par les organisations de l'économie sociale, ainsi que dans d'autres secteurs. Cela découle de la popularité des objectifs de développement durable (ODD) et de l'élargissement de la réflexion collective en matière d'impact. L'article avance un modèle de comptabilité sociale intégrée qui regroupe quatre dimensions : 1) ressources / capitaux, 2) création / destruction de valeur, 3) systèmes et processus internes et 4) apprentissage organisationnel, croissance et innovation. Les organisations qui utilisent ce modèle se concentrent sur les implications de leurs activités dans l'optique des ODD, en cherchant à la fois en interne et en externe.

Keywords / Mots clés Social accounting; Sustainable development goals; Balanced scorecard; Performance management; Impact measurement / Comptabilité sociale; Objectifs de développement durable; Tableau de bord équilibré; Gestion de la performance; Mesure d'impact

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INTRODUCTION

One of the complexities of impact measurement is navigating the overwhelming number of methods, indicators, and tools available to do so. With so many options, it is difficult for organizations to aggregate results to measure economic, social, and environmental performance beyond their walls. Impact reporting remains siloed and not easily connected to measuring changes over time in communities, regions, and countries.

In addition to the lack of uniformity, the very idea that social impact can be precisely measured has been challenged. This is evidenced by the many difficulties facing organizations trying to measure their impact (Mook, Maiorano, Ryan, Armstrong, & Quarter, 2015; Ruff & Olsen, 2016). For instance, organizations calculating a social return on investment (SROI) ratio report that social impact measurement is a highly subjective process. The complexity of calculating "dead-weight" (the amount of impact that would have happened without the activity anyway), "attribution" (the percentage of impact attributable to the organization), and "drop-off" (the degree to which impacts diminish over time) adds to the subjective nature of the result (Nicholls, Lawlor, Neitzert, & Goodspeed, 2012). Because of this, outcomes are not comparable between organizations or programs. Nevertheless, it is hard to avoid the temptation to compare.

On the positive side, undertaking an impact measurement process such as SROI results in increased dialogue and engagement with stakeholders. In turn, the knowledge gained leads to improvements in performance. Indeed, studies have found that the process of doing any evaluation at all and sticking with it were crucial factors in the success of the program evaluated (Waits, Campbell, Gau, Jacobs, Rex, & Hess, 2006).

Building on the Nonprofit Integrated Social Accounting (NISA) model (Mook, 2014) and the popularity of the United Nations Sustainable Development Goals 2030 Agenda (United Nations, n.d., Appendix 1), a new integrated social accounting (ISA) model that expands its focus to align with societal impact is proposed. Whereas the NISA model motivates and monitors organization performance toward achieving an organization's mission, ISA focuses on both inward-facing and outward-facing organizational and societal goals using the lens of the sustainable development goals (SDGs).

This ISA model consists of four interconnected dimensions: 1) resources/capitals, 2) value creation/destruction, 3) internal systems and processes, and 4) organizational learning, growth, and innovation.

At a high level, ISA responds to the following questions:

1. Resources/capitals: What level of resources/capital does the organization need to operate effectively and efficiently in line with the SDGs to achieve its mission?
2. Value creation/destruction: What difference is the organization making economically, socially, and environmentally through the lens of the SDGs?
3. Internal systems and processes: What internal systems and processes does the organization need to have in place to successfully achieve its goals and remain viable?
4. Organizational learning, growth, and innovation: What can the organization learn from itself and its stakeholders to improve its impact on the SDGs and maintain organizational sustainability?

Through these four dimensions, organizations link performance management and impact measurement, addressing efficiency and effectiveness, functional and strategic accountability, and feedback and adjustment. The SDGs provide the common lens that allows for organizations to take collective impact[1] to what Mark Cabaj and Liz Weaver (2016) argue is the next level: moving from a managerial to a movement-building perspective.

As noted previously, there is an overwhelming number of indicators organizations can use to measure impact. Switching the paradigm of impact measurement from a positivistic one to an interpretivist one can alleviate some of the complexity: "this shifts the framing … from calculating a precise number to generalize and predict, to understanding lived experiences to improve impact and to mobilize resources. Calculations are still important, but they are not the ends" (Mook et al., 2015, p. 237).

Flexibility is also important. There are many ways to reach a goal. This is the perspective taken by the Common Approach to Impact Measurement (2019) initiative for social enterprises led by accounting professor Kate Ruff and housed at Carleton University (Common Approach, 2019). As Ruff and Sara Olsen (2016) argue,

> The market is best served when each organization can measure its social impact in the way that is most meaningful and insightful to its aim and operations, as long as it follows common principles for good measurement. Drawing insights from financial accounting,[2] good analysts focus on measures that are flexible and adaptable to different contexts (within limits), applied consistently (organizations pick an approach and stick to it), and well disclosed (bring on the fine print!). (p. 2)

To help align with the SDGs, Statistics Canada, along with several other federal departments, have developed the Canadian Indicator Framework (CIF). The CIF sets out ambitions and suggestions of indicators for each of the SDGs in the Canadian context. These could be a starting point for relating the global SDGs to a local context. They provide guideposts and another step toward a shared language and shared values (Global Affairs Canada, 2018; Government of Canada, 2019a). Data hubs hosted by Statistics Canada track Canada's progress at the national level (Government of Canada, 2019b).

A single organization will not necessarily impact all SDGs but will self-align with the ones that are most material in terms of their value creation or the minimization of negative impact. Guidelines for establishing materiality are available through bodies such as the Sustainability Accounting Standards Board (SASB, 2018), the Global Reporting Initiative (GRI, 2013), and Social Value UK (2019).

To facilitate understanding and action, the SDGs can be categorized into themes. For instance, the investment firm MSCI (2016) proposes five actionable impact themes that are applicable across a broad set of stakeholders: 1) basic needs, 2) empowerment, 3) climate change, 4) natural capital, and 5) governance. Each theme is matched up to a set of SDGs (see Figure 1).

Figure 1: SDGs by actionable theme

Theme	Sustainable Development Goal (SDG)
Basic Needs	1. No poverty 2. Zero hunger 3. Good health & well-being 6. Clean water & sanitation, 11. Sustainable cities & communities
Empowerment	4. Quality education 5. Gender equality 8. Decent work & economic growth 9. Industry, innovation & infrastructure 10. Reduced inequalities
Climate Change	7. Affordable & clean energy 13. Climate action
Natural Capital	12. Responsible consumption & production 14. Life below water 15. Life on land
Governance	16. Peace, justice, & strong institutions 17. Partnerships

MOVING FORWARD

This article proposes the next wave of integrated social accounting, linking performance management and impact measurement through the common lens of the

SDGs. In implementing ISA, organizations report on selected metrics associated with the SDGs to a common data hub, and these data could be used for further analysis to inform policy and resource allocation at all levels. As multiple organizations across different sectors are driven by common goals, albeit in different ways, we can move closer to accomplishing the SDG 2030 agenda.

NOTES

1. Collective impact involves organizations with a common agenda and shared measurement system working together to achieve social change (Collective Impact Forum, 2014).
2. See Ruff (2013).

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APPENDIX A: SUSTAINABLE DEVELOPMENT GOALS

Goal			Ambitions
1	No poverty	End poverty in all its forms everywhere	Reduce poverty in Canada in all its forms
2	Zero hunger	End hunger, achieve food security and improved nutrition and promote sustainable agriculture	Canadians have access to sufficient, affordable and nutritious food Canadian agriculture is sustainable
3	Good health and well-being	Ensure healthy lives and promote well-being for all at all ages	Canadians adopt healthy behaviours Canadians have healthy and satisfying lives Canada prevents causes of premature death
4	Quality education	Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all	Canadians have access to inclusive and quality education throughout their lives
5	Gender equality	Achieve gender equality and empower all women and girls	Canadians are well represented at all levels of decision making Canadians share responsibilities within households and families
6	Clean water and sanitation	Ensure availability and sustainable management of water and sanitation for all	Canadians have access to drinking water and use it in a sustainable manner
7	Affordable and clean energy	Ensure access to affordable, reliable, sustainable and modern energy for all	Canadians reduce their energy consumption Canadians have access to clean and renewable energy
8	Decent work and economic growth	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all	Canadians have access to quality jobs Canadians contribute to and benefit from sustainable economic growth
9	Industry, innovation and infrastructure	Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation	Canada fosters sustainable research and innovation Canadians have access to modern and sustainable infrastructures
10	Reduced inequality	Reduce inequality within and among countries	Canadians live free of discrimination and inequalities are reduced
11	Sustainable cities and communities	Make cities and human settlements inclusive, safe, resilient and sustainable	Canadians have access to quality housing Canadians live in healthy, accessible, and sustainable cities and communities
12	Responsible consumption and production	Ensure sustainable consumption and production patterns	Canadians consume in a sustainable manner
13	Climate action	Take urgent action to combat climate change and its impacts*	Canadians reduce their GHG emissions Canadians are well-equipped and resilient to face the effects of climate change

APPENDIX A: (continued)

Goal			Ambitions*
14	Life below water	Conserve and sustainably use the oceans, seas and marine resources for sustainable development	Canada protects and conserves marine areas and sustainably manages ocean fish stocks
15	Life on land	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss	Canada ensures all species have a healthy and viable population Canada conserves and restores ecosystems and habitat Canada sustainably manages forests, lakes and rivers
16	Peace and justice strong institutions	Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels	Canadians are safe and secure, in person and online Canadians have equal access to justice Canadians are supported by effective, accountable, and transparent institutions
17	Partnerships to achieve the goal	Strengthen the means of implementation and revitalize the global partnership for sustainable development	Canada fosters collaboration and partnerships to advance the SDGs

**Source:* Government of Canada (2019a)

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