

VOL. 3 NO. 1
SPECIAL ISSUE

International Journal of
**CO-OPERATIVE ACCOUNTING
& MANAGEMENT (IJCAM)**

Exploring a wide range of topics related to accounting and management in co-operatives, credit unions, and mutual organizations, including:

- Theory and Practice
- Financial Management
- Standards Performance
- Innovation Management
- Education
- Tax Accounting
- Auditing Technology
- Public Responsibility and Ethics
- Information and Systems
- Knowledge Management
- Systems Management
- Best Management Practices
- Behavioural Accounting
- Co-operative Management Research
- Social and Environmental Reporting
- Management Challenges
- Cost/Managerial Accounting
- Professional Development
- Measurement and Analysis
- Latest Management Theories



International Journal of
**CO-OPERATIVE ACCOUNTING &
MANAGEMENT (IJCAM)**

Vol. 3 No. 1

Special Issue: Co-operative Research and
Education Programs at Canadian Universities

Introduction	2
Editorial Board	3
Cape Breton University: Building on the CED Legacy of Fr. Greg MacLeod <i>Harvey Johnstone</i>	4
Learning to Manage the Co-operative Difference: Saint Mary's Co-operative Management Education <i>Tom Webb</i>	18
The University of Sherbrooke: IRECUS' History of Collaboration with the Cooperative Sector <i>Claude-André Guillotte, Anne-Marie Merrien, Josée Charbonneau, Jocelyne Champagne Racine</i>	29
The University of Winnipeg: The Business Chair in Co-operative Enterprises <i>Simon Berge, Darryl Reed</i>	44
University of Saskatchewan: The Centre for the Study of Co-operatives <i>Merle Massie</i>	55



Introduction

THE THEME FOR THIS SPECIAL ISSUE arose from discussions among members of the Board of Canadian Association for Studies in Co-operation (CASC) concerning the need to generate awareness among co-operators, academics, students and the general public about the interesting forms of co-operation that take place between the co-operative sector and institutions of higher education and the importance of such initiatives. While collaboration between the sector and institutions of higher education goes back to the nineteenth century and has existed in countries around the world, the nature of such collaboration is not widely known. This special issue seeks to highlight some of the ongoing initiatives in Canadian universities that relate to research, education and even support for the incubation of new businesses.

GUEST EDITORS:

Darryl Reed is Professor of Business & Society at York University. His research interests include co-operatives, fair trade movements, business and economic ethics, and social entrepreneurship.

Isobel M. Findlay is Professor emerita, Edwards School of Business, University of Saskatchewan. She is also Fellow in Co-operatives, Diversity, and Sustainable Development, Centre for the Study of Co-

operatives; University-Co-Director, Community-University Institute for Social Research.

Claude-André Guillotte is a professor in entrepreneurship at the Business School of the University of Sherbrooke. He is the Director of the Research and Education Institute for Cooperatives and Mutuals of University of Sherbrooke (IRECUS).

Judith Harris is Associate Professor, Urban and Inner-City Studies at the University of Winnipeg. Her background is in planning and economics, with a particular interest in social learning and social mobilization approaches to planning. She currently serves as the President of CASC.

We would like to extend our thanks to the guest editors for their work on this special edition. Also, please note that we are issuing a call for papers for another special edition of IJCAM which is focused on ***Social, Environmental and SDG Performance and Reporting in Co-operatives***. Papers related to management topics should be submitted to Peter Davis and those focusing on accounting and reporting should be submitted to Daphne Rixon.

Daphne Rixon
Editor-in-Chief

Peter Davis
Senior Editor



2

IJCAM
Feb/20

Editorial Board

Co-operative Accounting and Reporting

Daphne Rixon, Editor-in-Chief	Centre of Excellence in Accounting and Reporting for Cooperatives (CEARC), Saint Mary's University, Canada
Michele Andreaus	University of Trento, Italy
Louis Beaubien	Dalhousie University, Canada
Ericka Costa	University of Trento, Italy
Fiona Duguid	Research Fellow and Adjunct Professor, Co-operative Management Education (CME), Saint Mary's University
Olive McCarthy	Centre for Co-operative Studies, University College Cork, Ireland
Fernando Polo-Garrido	Centre of Research in Business Management (CEGEA) Polytechnic University of Valencia, Spain

Co-operative Management

Peter Davis, Senior Editor	University of Leicester, UK
Samuel Natale, Associate Editor	Adelphi University, NY
Yiorgos Alexopoulos, Associate Editor	European Research Institute for Co-operatives and the Social Economy (EURICSE) based in Trento and a Member of the Economics Faculty at the Agricultural University of Athens
Sanjay Verma	Researcher and journalist with a variety of roles in both the Co-operative Union of India and the ICA Asia Pacific Regional Office



Cape Breton University: Building on the CED Legacy of Fr. Greg MacLeod

Harvey Johnstone, Professor Emeritus, Shannon School of Business, Cape Breton University

Abstract: This article examines the work and legacy of Fr. Greg MacLeod at Cape Breton University. A professor of philosophy, MacLeod was an ardent supporter and insightful critic of co-operatives. He was one of the founders of the Community Economic Development (CED) movement in Canada and spent nearly fifty years developing co-operatives and other community businesses as part of a CED strategy for Cape Breton. The article begins by noting two important sources of inspiration and learning for MacLeod, both are co-operative movements with close ties to institutions of higher education (the Antigonish Movement and the Mondragon Co-operative Corporation). It then indicates how the context of his native Cape Breton shaped MacLeod's early efforts at promoting local economic development, and some lessons learned. Next, the article analyses how MacLeod and colleagues developed New Dawn Enterprises, the country's first CED Corporation. This leads to an investigation of how MacLeod's initiatives represent an innovative approach to local economic development. The final section indicates how MacLeod, with the support of colleagues, leveraged his position at the university to develop research institutes and education and research programs, as integral partners of the local CED movement.

Harvey Johnstone is Professor Emeritus with the Shannon School of Business at Cape Breton University (CBU). A close colleague of Fr. Greg MacLeod for more than forty years, he has a background in business and philosophy and is a former Dean of Research at CBU.

Keywords: community economic development, co-operatives, action research, place-based entrepreneurship, social innovation, Cape Breton

Universities have a long history of working with co-operatives in different countries. Historically, this work has been most prominent in the agricultural sector, especially in North America, with university extension programs and departments of agricultural economics and agronomy providing support for rural development. This support consisted predominantly, but not exclusively of the university providing technical and/or professional education and training, including the sharing of recent research which that better enable farmers to determine which crops to grow and how to best maximize yields and market their products. As a rule, however, universities and their faculty members were not actively involved in the direct promotion of new co-operative businesses or other social enterprises.

There have been exceptions to this rule, however, of which Cape Breton University (CBU) is one. This chapter examines the role of CBU, and especially one of its most prominent faculty members, Greg MacLeod, in the development of co-operatives and other community businesses as part of a community economic development strategy.

Introduction

Father Greg MacLeod was born into a large working-class Catholic family in Cape Breton. Early on he recognized his vocation and decided to study for the priesthood in the Diocese of Antigonish¹. In addition, however, he was formally trained as a philosopher at the University of Louvain in Belgium and at Oxford University in the UK. When he returned to Cape Breton from Europe in 1969 after finishing his doctoral studies, he was assigned to teach philosophy at Xavier College in Sydney, later to become Cape Breton University².

Upon returning home MacLeod was struck by the weak state of the Cape Breton economy and the favoured policy response by government offices (including Manpower Services), which was to encourage people to move to other

parts of the country where jobs were more abundant. Drawing upon the literature of economic geography, MacLeod and his colleagues later characterized Cape Breton as a “depleted community” (Johnstone and Lionais 2004).

One part of this concept relates to the dynamics of uneven development in capitalism, in which non-metropolitan areas are not only more vulnerable to regular economic cycles, but also to larger structural changes in the economy (Smith 1990). In Cape Breton, which to a large extent had a resource-based economy, recoverable coal reserves were rapidly being depleted, resulting in severe job losses. In the coming decades, a similar dynamic would occur in fishing with the cod moratorium and the decline in other fish stocks. Cape Breton’s other major heavy industry was also in decline. Changes in production technologies and markets had made Cape Breton’s steel plant less viable, a situation which was further exacerbated by programs of economic deregulation and liberalization in the 1980s, which induced the movement of many light and heavy industries to developing countries. These liberalizing policies also undercut previous government job creation strategies based upon attracting investment from outside capital with the allure of subsidies and tax breaks. The net impacts of these situations were a *capital drain* and *brain drain*, dynamics that further exacerbated the downward economic spiral (Johnstone and Lionais 2004; Reed 1999)

The other side of the notion of depleted communities relates to the fact that Cape Breton is comprised of a variety of ethnic and linguistic communities. These include the indigenous Mi’kmaq, French-speaking Acadians with roots going back to the 17th century, descendants of Gaelic-speaking Scottish immigrants (many of whom fled as part of the highland clearances), descendants of Irish forebearers (forced to emigrate due to the potato famine), as well as other European immigrants (Polish, Jewish, Italian, and Ukrainian) and West Indians who were attracted by work in the coal industry dating back to the 19th century and the steel industry in the 20th century. Over the years, these communities were able to develop and maintain rich social and cultural lives. Economic downturns, however, implied a difficult trade-off for many, giving up the social quality of their lives in return for access to steady employment. Moreover, such downturns not only affected individuals, they had the potential to wipe out entire towns and communities. While MacLeod believed that people should not be forced into such trade-offs, he was also cognizant of the fact that government alone could not be relied upon to find solutions. The resolution to this situation would depend upon the community organizing to create local jobs. This would become his mission – his life’s work. (MacLeod 1997; Johnstone 2019)

Antecedent Local Economic Development Movements

In engaging in local economic development, MacLeod drew upon a variety of academics and practitioners to guide him in his work. Perhaps the two most influential sources of inspiration, and the ones with which he could most readily identify, were co-operative movements in which Catholic priests had prominent leadership roles and which had close connections with institutions of higher education.

The Antigonish Movement

The first such movement was very close to home, centered around St. Francis Xavier University (St. F.X.) in Antigonish, Nova Scotia, the town from which the movement would draw its name. The Antigonish Movement emerged in response to the very challenging economic circumstances facing the people of eastern Nova Scotia in the 1920s and 30s. During those difficult times there was little or no help available to families through government programming. Moreover, because communication and transportation links were quite limited, communities were isolated. Added to this, people had very little formal education. In industries like fishing, these factors contributed to a situation where those engaged in harvesting were systematically marginalized and exploited by buyers and processors (Dorado and Pluta, 2012, p. 23).

Two cousins, both Catholic priests, were among the most prominent leaders of the Antigonish movement, Fr. Jimmy Tompkins and Fr. Moses Coady.³ Three key themes ran through their work and that of the movement more generally. The first of these was *education*. Tompkins, who worked as a parish priest, believed deeply in the power of knowledge and he saw adult education as an instrument that could impart that knowledge. In line with the adult education movement, the Antigonish movement relied heavily on *study clubs*, which would be used for a variety of functions. One of the roles of the clubs was to promote basic literacy among the population, an achievement which also helped to instill confidence in people and facilitate public interaction and involvement. The study clubs were

complemented by circulating libraries (books in boxes), mass meetings and conferences (Dorado and Pluta, 2012, p. 97).

A second theme of Tompkins and Coady was *social justice*. The study clubs, which focused on economics and the local situation, helped the people better understand the causes of their dire economic situation. While the leaders of the movement laid bare the exploitative nature of local economic relations, they did not place the blame entirely on corporate buyers and processors. Rather, Coady argued, the deplorable state in which the people of eastern Nova Scotia found themselves could be traced back to their own inaction, which he described as the “great default of the people.” According to this account the people had gradually relinquished control over decisions that affected them and this eventually led to their present appalling circumstances characterized by apathy and hopelessness. In a similar vein, Tompkins, cautioned that social justice had to be earned: “No body of men is worthy of a socially just society unless it is able to merit it by its intelligence and its moral backbone.” (Tompkins, 1935)

This latter remark points to a third theme of the Antigonish Movement, *action*. Coady, argued that to recover from their current situation and once again become “masters of their own destiny”, the people would have to mobilise and work collectively to initiate change. For his part, Tompkins summarized the situation this way, “It is not enough to have good ideas we must put legs on them.” (Father Jimmy, n.d.) Coady would frequently relate stories from the early years of the movement to illustrate how working collectively even in simple ways could help overcome exploitative circumstances. One of the most popular of these was about four fishermen from Whitehead who sent a crate of lobster to Boston instead of selling to local buyers, as was the custom. The fishermen received \$24.00 compared to the \$5.60 that they would have been paid locally. That experience quickly convinced them to adopt a new course of collective action that better served their own interests (Dorado and Pluta, 2012, p. 92).

For the Antigonish movement, *group entrepreneurship* would be the preferred initiative for creating change, while *co-operatives* and *credit unions* were viewed as the best tools for this purpose. Co-operatives were judged to be a fair and effective model for individual business, while the widespread use of co-operatives could contribute to the Movement’s longer term objective of establishing a participatory and locally controlled economy (Dorado and Pluta, 2012, p. 48). The study clubs served as the site for the incubation of co-operatives. In addition, Frs. Tompkins and Coady had other unique assets that were available to them at St Francis Xavier University, especially with the establishment of its Extension Department in 1928. With its ability to support research, along with outreach and educational activities in the community, St.FX. would provide an institutional base for the Antigonish Movement (Dorado and Pluta, 2012, p. 20).

The movement made great strides in the 1920s and 1930s in promoting co-operative businesses (processing plants, credits unions, grocery stores, etc.) which contributed, along with growth in the coal and steel sectors, to significant improvements in the local economy and the quality of life of residents. By the 1940s and 1950s, however, the entrepreneurial dynamism of the movement would begin to fade. Three factors were primarily responsible for this decline. First, the initial success of the movement was based to a significant degree upon capturing low hanging fruit. This meant that over time, it became more challenging to identify new opportunities for group entrepreneurship that could produce outcomes as dramatic as the earlier cases. While Fr. Coady would cajole people that “you have to find your lobster” (MacLeod 1986, p. 67), increasingly there were fewer lobsters to find. Second, with the early successes, many of the Movement’s study clubs began to focus more on operational and management issues that were of greater relevance and urgency to the established co-operatives. Correspondingly, as less emphasis was given to new start-ups in the study groups, interest waned and attendance dropped (Dorado and Pluta, 2012). Third, by the 1950s, the St Francis Xavier Extension Department began to undergo a prolonged period of ‘*mission drift*’ and it gradually lost touch with the people it had been first established to serve. A key element of the movement’s early formula, *action*, faded away as analysis and report writing displaced entrepreneurial activity. While the internal changes were often subtle, their consequences were cumulative. The Antigonish Movement increasingly became less a core component of the Department’s operations and more a part of its history (Dorado and Pluta, 2012).

Mondragon Co-operative Corporation

The second primary source of inspiration for Greg MacLeod was the Mondragon Co-operative Corporation (MCC). Headquartered in the Basque region of Spain, MCC comprises more than 250 business and organizations. Inspired

by Fr. José María Arizmendiarieta, the first co-operative, which produced paraffin stoves, was established in 1956 by five graduates of the local polytechnic, which the curate had founded. Over the following decades, Arizmendiarieta worked with the founders of the first enterprise to develop co-operatives in a variety of sectors, including industry (e.g., white goods, aerospace, automotive), distribution (e.g., supermarkets, sports equipment), finance (e.g., banking, financial services, etc.) and, research and education (with the polytechnic developing into Mondragon University).

The Basque region is a very distinctive part of Spain with its own language and cultural traditions that go back well beyond the emergence of a Spanish state. The driving factor in the co-operative development efforts was the desire to create local jobs, so that Basques would not have to travel to other parts of Spain or go abroad to seek work. In this effort, MCC would prove very effective, currently providing employment to approximately 75,000 workers. While extensive reserves of social capital were one factor contributing to the success of MCC, equally important has been their ability to institutionalize the entrepreneurial function which enabled them to incubate co-operatives across a range of sectors. Initially this was done through somewhat informal collaboration between the credit union (Caja Laboral), a research and development firm, Ikerlan (a joint venture of the Caja Laboral, the polytechnic, and the industrial co-operatives) and the polytechnic. With the formation of the Mondragon Co-operative Group in 1984, this entrepreneurial process was formalized and a more centralized strategic planning process became possible (MacLeod 1997; MacLeod and Reed 2009).

Over the decades of its existence, Mondragon has faced various challenges as the business climate was dramatically transformed with developments in technology and changes in the political and economic realms. For their first two decades, the co-operatives of Mondragon operated in an autarkic economy under the rule of Franco, with little or no international competitive pressures. With the return to democracy and Spain's entrance into the European Union in 1986, Mondragon faced serious challenges as they now had to compete in the domestic market against much larger competitors with more advanced technology. To survive in these new circumstances, Mondragon adopted a somewhat defensive innovation strategy which focused on improving product quality (Catania 2006).

The competitive challenges facing Mondragon continued to mount in the 1990s in an increasingly global economy spurred on by liberalizing reforms in trade and finance. In the face of increasing price competition from firms who had outsourced many of their non-core functions and shipped most of their production offshore, Mondragon understood it had to address its core problem, its production process. Mondragon was forced to adopt its own internationalization strategy, one in which it would compete in emerging economies (e.g., China, India, Brazil, Mexico, etc.), relying upon local production facilities. The goal behind this "multi-localization" strategy was not to generate profit for its own sake. Rather, Mondragon was leveraging its know-how and brand in these markets, so it could essentially subsidize the costs of keeping plants open in Spain (which continued to produce for the European market). (MacLeod and Reed 2007)

In developing operations in emerging markets, Mondragon adopted a variety of business arrangements (e.g., partnerships, wholly-owned subsidiaries) which were arguably not in line with co-operative principles (Errasti, Bakaikoa and Elgoibar 2003). Two basic questions arose in this context. The first was whether such an internationalization strategy necessary. The answer to this question was clearly "yes", if Mondragon wanted to maintain the existing level of its workforce in Spain. The second question was what, if anything, Mondragon should do to address deviations from its co-operative principles? Some suggested that Mondragon should take measures (e.g., profit sharing, support for unions, etc.) that in the mid-to-short term could mimic and in the longer term could pave the way for co-operative production relations (Cancelo 2006). Others, however, were less concerned about abandoning the co-operative form, including one of the founders, José María Ormaechea.⁴ While not opposed to many of the reform measures proposed (e.g., profit sharing), they did not see (re)establishing co-operative institutions as an end in itself. They argued that more important than the organizational form were the goals that they wanted to achieve.

Lessons Learned

Greg MacLeod's interest in co-operatives was, in a sense, very pragmatic. His primary goal was to promote local economic development. What attracted him to the Antigonish movement and MCC was their proven track records

of promoting local economic development. Key lessons that he took away from their experiences included: (1) the need to focus on employment and income generation; (2) the creation of new local businesses as the key to generating employment and income opportunities; (3) the need to institutionalize (and collectivize) the entrepreneurial process for creating new businesses; (4) the need to innovate in order to adapt to changes in the business climate (including technology, trade agreements, business (de)regulation), and; (5) the key role of partner institutions, especially institutions of higher education.

MacLeod would take away other lessons from the experiences of Antigonish and Mondragon. One of the most important was that the co-operative form did not guarantee success.

Co-operatives are businesses that must compete in markets. Their success, like any other business, is predicated upon understanding the business climate and innovating to adapt to changing circumstances and opportunities. One of the key differences that MacLeod saw between the Antigonish movement and the MCC was the latter's abilities to continue to innovate over time. A related lesson for MacLeod, which would be confirmed by personal experience, was that employing the co-operative form was not always the best, or even a viable, option. A variety of circumstances (e.g., legal, political, personal) could undermine the use of the model. For MacLeod, such circumstances could not justify inaction. They demanded a different solution.

Finally, MacLeod understood that there were other underlying conditions for the success of Antigonish and Mondragon. Both benefitted from charismatic leadership that was able to provide a credible vision of an alternative local economy which people could embrace. This vision enabled the leaders to leverage the available social capital and mobilize people to co-operate for a greater good. For MacLeod a widely supported vision and a participatory structure that enabled people of action (entrepreneurs) to move on the vision would be a more important indication of a co-operative than a formal organizational structure (Johnstone 2019).

Early Experiments

When MacLeod returned to Cape Breton in 1969, he had not yet fully absorbed all of the lessons noted above. Nor did he have a fully developed plan detailing what he hoped to accomplish and how to proceed. What he did know was that he needed to act. Thus, in the early 1970s MacLeod took the lead in founding several organizations to promote local economic and social development. One of these, the Metropolitan Alliance for Development (MAD), successfully lobbied against a provincial government plan to close an Adult Vocational Training Centre (AVTC) in Cape Breton. The trade school was located in Point Edward – a former naval base near Sydney. Provincial plans favored replacing this school with a new, single institution, to be located in Halifax. Having halted the closure, MAD then engaged in several years of lobbying. These efforts contributed importantly to a decision by the province to construct a new AVTC in Cape Breton. The group was also successful in halting a plan to move a national Coast Guard Academy from Sydney to Cornwall, Ontario with the expected loss of 100 local jobs (MacLeod 1986 p. 18). To the surprise of MacLeod, however, the members of MAD were not emboldened by their successes; in fact, they were reluctant to become active on other fronts. MacLeod had a similar experience with a second organization, the Cape Breton School of Crafts (CBSC), which he incubated with financial support from a New Horizons grant. MacLeod proposed that the organization buy the Wolfson Building, a two-storey structure located on a downtown street, which had recently come on the market. The intent was that the School occupy part of the first floor and earn income by renting out the remainder of the building. Although everyone associated with the School of Crafts agreed that this was a great opportunity, the key people involved would not take the step of buying the building. They were very uncomfortable assuming financial risk. The basic lesson that he took away was that while many people were supportive of social improvement projects, they could not be relied upon to act if this required them to assume financial responsibility and deal with uncertainty.

MacLeod was not deterred by the lack of action by members of CBSC. Confident that proceeding with the purchase of the Wolfson Building was a viable project, MacLeod switched tactics and organized a small group of business people, who registered themselves on December 27, 1973 as the Cape Breton Association for Coop Development (CBACD).⁵ Three members of the new non-profit organization personally signed a \$20,000 note and applied for a mortgage from a local credit union. To obtain the mortgage the CBACD agreed to make immediate improvements to the property. Under MacLeod's guidance CBSC applied for and received a Local Initiatives Program (LIP) grant,

which was used to help pay for renovations to the building. In return for this contribution, the Craft School was given five years of free rent on the ground floor of the newly renovated Wolfson Building. CBACD itself applied for a Local Employment Assistance program (LEAP) grant with which they were able to finish the work on the Wolfson Building. Once renovations were completed, the remainder of the ground floor was leased to a local business.

Because the LEAP grant was available for three years, CBACD was able to purchase and rehabilitate several other buildings. Thus, in a short period of time, CBACD assembled a considerable asset base comprised of six properties generating rental income. However, as a tool for this kind of development CBACD had its limitations. For example, an application by CBACD to the Canada Mortgage and Housing Corporation seeking a mortgage for a new apartment building was refused based on the nature of its organizational structure and its articles of association. MacLeod was able to solve this problem by establishing a new legal entity, Shining Waters Ltd., specifically designed to procure a mortgage. While the new company was successful in its application and proceeded with construction of a new apartment building in the nearby town of Glace Bay, it became evident to MacLeod that a new organizational model was needed.

A Community Economic Development Organization

A key impetus in the development of a new organizational model would come in the fall of 1975 out of a conference held in Wolfville, Nova Scotia and organized by Dalhousie University, where Greg MacLeod met two future collaborators. Dr. Stewart Perry, a Harvard graduate, had worked with a variety of communities on “community economic development” (CED) in the US, where there were laws in place that allowed organizations to incorporate as “community development corporations” (CDCs). In their discussions, Perry convinced MacLeod that the latter was in fact engaging in CED and that the CBACD was functioning as a CDC. Also attending the conference was Mike Keyes, a federal government official in the department of Health and Welfare. Keyes was very interested in knowing more about CED and supporting initiatives of this sort. He encouraged MacLeod to apply for a demonstration grant to undertake an experiment, one that would create a CDC.

MacLeod was successful in the first stage of the grant competition which provided funds for a feasibility study. He contracted with a professional consulting group to develop an organizational model that could help to generate successful businesses, while maintaining the organization’s social goals. In balancing these two concerns, MacLeod was convinced that the emphasis had to be business development, as generating income is the only way the organization could be successful in the long term. The second stage of the application was also successful, and a demonstration grant was approved to organize a new CDC. The new enterprise would receive an allotment of \$120,000 for the first year and decreasing amounts over the subsequent four years (MacLeod 1997, p. 27). And so it was in June 1976 that New Dawn Enterprises Ltd. was incorporated as a not-for-profit company limited by guarantee.⁶

Many of the important features of New Dawn, including its then somewhat unique structure as a not-for-profit company limited by guarantee, came about as a result of discussions between MacLeod and Sydney lawyer Dene Burchell. Burchell, who had served as a Nova Scotia Supreme Court Justice, cautioned MacLeod not to let legal structures get in the way of what he wanted to do. Burchell’s advice was to start with what you wanted to achieve and build a legal structure that would facilitate your goals (Keshen 2017). Above all, MacLeod wanted a structure that would not restrict him or prevent him from taking action. By drawing upon the advice of Burchell, New Dawn Enterprises would enable MacLeod and his colleagues to support a range of business ventures that could contribute to employment generation, social development and cultural promotion.

A Community Economic Development Strategy

The discussions with Perry, Keyes and Burchell provided MacLeod and his collaborators with language and insights into an institutional form around which he could develop a local economic strategy for Cape Breton. In developing this strategy, they were also heavily indebted to the co-operative movements discussed above. Four basic components of the strategy can be identified, each of which exhibited important innovative features.

Community Businesses

As noted above, one of the lessons that MacLeod took from Antigonish and Mondragon was the need to develop local businesses rooted in the community, as these provided the best means for creating jobs and income for local residents. In the case of Antigonish, income generation was largely based upon the organization of producer co-operatives (fishing, agriculture), as well as employment provided through financial and distribution co-operatives. In Mondragon, there was a similar pattern, but with a stronger focus on worker co-operatives in industrial sectors, rather than producer co-operatives. While MacLeod was supportive of co-operative businesses, his experience and different socio-economic circumstances led him to believe that he needed to be more flexible with regard to business forms.

MacLeod and his colleagues did not want to promote just any business, however. Their goal was to incubate businesses that would create stable employment/income and provide products and services needed in the community. Their key innovation was in understanding what type of businesses could serve this function. They would refer to them as “community” or “place-based” businesses (MacLeod, McFarlane and Davis 1997). The key features of such enterprises were their desire to operate in the community (place) rather than maximizing profits and their contribution to local wealth creation through a combination of grounding mechanisms (e.g., generating local employment, maintaining local headquarters, capturing local investment funds, building local infrastructure, patronizing local suppliers, retaining profits in the community, being governed by local actors, meeting local needs). Such businesses might be co-operatives, non-profits, small family-owned enterprises or even locally-owned corporations (Lionais and Johnstone 2009).

A Community Business Incubator

His first experiences of organizing new enterprises led MacLeod to a concrete appreciation that creating new (community) businesses was not easy, and that few individuals were able and willing to take up such a task. The lesson that he took away from this was that the role of entrepreneurship needed to be collectivized and that those who had entrepreneurial drive needed to be supported. This was not an entirely original insight on MacLeod’s part. He was aware of how Mondragon had developed a business incubation process. His challenge was to establish one suited to the context in which he was working (MacLeod 1997).

New Dawn Enterprises would be MacLeod’s business incubator. What was innovative about New Dawn was its mission of community economic development and its legal incorporation as a CDC, which was tailored by MacLeod to meet local needs. Over the years, New Dawn has incubated and supported a variety of new and fledgling community businesses, some which have displayed significant innovation in their own right (Lionais and Johnstone 2009). Of the enterprises incubated, some would become independent, while others would retain an association with New Dawn. Currently, these latter businesses are organized into the following divisions: Health Care, Meals on Wheels, Centre for Social Innovation, Rental Properties, Community Engagement, Cape Breton Island Centre for Immigration, and Invest Local.⁷

A (Social) Venture Capital Fund

Another lesson that MacLeod learned early on was the need for a reliable source of capital to fund community businesses. Again, this was not an entirely new insight on MacLeod’s part. He was very aware of the role that credit unions played in Antigonish and that the Caja Laboral played in Mondragon with regard to new enterprise finance. MacLeod, himself, would work with credit unions as and when possible, but local credit unions were not interested in new start-ups. What MacLeod needed was a venture capital fund with a difference. A new structure called Banking Community Assets (BCA) Group would fulfill this function.

As was the case with the formation of New Dawn Enterprises, the BCA Group emerged out of the results of several different initiatives that MacLeod spearheaded. The first of these was the establishment of BCA Holdings Ltd. in 1989. Although New Dawn had been exploring the idea of setting up a venture fund for some time, those involved in these discussions were unable to agree on a way forward, a case of what MacLeod deemed “paralysis by analysis.” In response to this situation, MacLeod and two friends set up BCA Holdings as a not-for-profit company limited by guarantee, with each contributing \$5,000 to create an operating kitty of \$15,000. At first glance it may seem very odd to organize a venture capital institution as a not-for-profit company, but the intentions here included clarity of

purpose and a commitment to keep costs at a minimum. For MacLeod, the initial investments also served to quickly separate those who were prepared to *act* from those who were *only* prepared to *talk*. A small board was organized and they asked friends to lend money to the fledgling company; in return, BCA Holdings would pay what was then a modest interest of four percent. Those who contributed were assured that they could get their money out at any time; that is, these were essentially demand loans. By these means the fund grew to \$50,000.

A second initiative by MacLeod in the early 1990s led to significant growth in BCA Holdings. At the time, a federal government agency was working with local Boards of Trade (BoTs) in the Atlantic region to promote the creation of local venture capital funds. Specifically, the government was offering to match dollar for dollar funds that BoTs established. Upon noticing that his local BoT had not shown any interest, MacLeod decided that BCA Holdings should apply for the matching funds, even though it was formally not eligible. When the federal agency accepted BCA's application, subject to the organization raising \$500,000 in matching funds within six months, MacLeod and his colleagues set to work. Using word of mouth⁸ BCA managed to achieve part of this goal. In addition, it was able to garner the support from a church-related group in Toronto that commonly made community development loans, which contributed \$250,000. As a result, the \$500,000 was raised just as the deadline was reached in September 1992. In 1993, after meeting a *very long* list of further conditions demanded by the federal agency, the loan to BCA Holdings went through. Although BCA only had this capital for a short time⁹ the company managed to invest the funds into a highly successful project called Tompkins Place. That project is described elsewhere (Johnstone 2019).

A third initiative by MacLeod resulted in the formation of the BCA Investment COOP Ltd. This organization was established as part of a response to the Community Economic Development Investment Fund (CEDIF) Programme launched by the Province of Nova Scotia in 1999. Under the terms of this programme, a community group could set up an incorporated company (referred to as a CEDIF), which could sell shares and then use the capital raised for local investment.¹⁰ While such a program was very attractive to BCA Holdings, it was not eligible to apply to the CEDIF program due to its legal status as a not-for-profit company limited by guarantee. It was to clear this legal hurdle that MacLeod and his colleagues incorporated BCA Investment COOP Ltd., as a for-profit company on January 23, 1998. Between 1999 and 2001, BCA Investment COOP Ltd., which was the first CEDIF in Nova Scotia, raised \$1.27 million from about 300 investors. BCA Holdings Ltd. and BCA Investment COOP Ltd. constitute the cornerstones of BCA Group, which also includes several smaller companies that were subsequently established.

By most standards, the amounts invested by BCA are very small (about \$2.5 million). The results, however, are impressive. A list of successful projects assisted by BCA includes: two rope manufacturing plants; a fish processing plant; a food processing plant; a forty-four unit condominium; three motel-restaurant complexes; a plumbing and heating company; two commercial centres, a window manufacturing plant, a radio station, an industrial park and a hardwood floor manufacturer. An independent economic assessment of BCA Group completed seven years ago reported that current replacement value of the assets tied up in these businesses at that time was \$32.5 million, the number of direct full time equivalent (FTE) jobs they supported was 522, and the total number of direct and induced FTE jobs was 872 while the estimated annual impact on GDP was \$38.96 million and the current estimated annual impact on household income was \$26.03 million (Foster, Duff, Peters and Currie, 2011). Since this assessment BCA has continued to be active and these numbers are almost certainly an understatement of its present impact.

Tripartite Partnerships

As noted above, one of the core lessons that MacLeod took from Antigonish and Mondragon was the important role that the university could play in local economic development and the incubation of new enterprises. Unlike these movements, however, MacLeod was a strong advocate, in both theory and practice, of collaborating with government agencies.¹¹

Government partnerships and programs were incorporated into all aspects of MacLeod's CED work from the beginning. Both of MacLeod's core CED institutions, New Dawn and the BCA Group, drew heavily upon government programs in their incubation and growth stages, with MacLeod frequently working closely with government officials to extend the boundaries of such programs to include CED organizations. MacLeod also relied upon government research funds (e.g., from the Social Science and Humanities Research Council) to investigate the feasibility of new CED ventures in different sectors (e.g., tourism, information technology, etc.). MacLeod and his colleagues would

also draw upon government programs (which funded regional economic development and the small business sector) to support new and fledgling community businesses. In a changing business climate and in a context of depleted communities, MacLeod always saw government as an essential partner.

In this respect, MacLeod was well ahead of his time. It was not until the late 1980s and early 1990s, when academics began to discuss an emerging *knowledge economy*, that a model referred to as the *triple helix* gained prominence. In the triple helix approach, development (especially economic and social development) is brought about by a co-operative effort involving government, business and universities (Etzkowitz and Leydesdorff 1995). Fr. Greg promptly aligned himself with this emerging terminology and consistently used the triple helix model to describe his own approach (MacLeod, McFarlane and Davis 1997). The new terminology acted as a kind of confirmation that the methods he had already been employing for nearly two decades were paralleling best practices. The role of the university in these endeavours is elaborated below.

The University as a Partner in CED

MacLeod shared with the founders of the Antigonish movement and the MCC a philosophy of Christian social action. Johnstone sums this philosophy up in the following way:

- a) At times, our actions can leave the world in a better state than we found it;
- b) When it is within our capacity to act in these ways, we have a responsibility to do so. This is a moral imperative;
- c) The greater one's capacity to bring about such positive change, the greater one's responsibility to act. (Johnstone 2019, p.21)

MacLeod also shared with the founders of the Antigonish movement and Mondragon the conviction that this philosophy of social action was compatible with the mission and roles of institutions of higher education, and that this philosophy could and should be applied to local/community economic development. Accordingly, this social action philosophy imbued MacLeod's understanding of his professorial responsibilities of research (knowledge generation), teaching (knowledge dissemination and acquisition) and development/community engagement (knowledge application). Thus, for MacLeod and his colleagues CED was not something that they pursued in addition to their roles as academics, but an activity that they engaged in as a vehicle for fulfilling their academic responsibilities.

Action Research

For MacLeod, the philosophy of social action meant that his responsibilities of research and community engagement were potentially complementary and might be most effectively pursued in tandem. MacLeod pursued these two responsibilities jointly under the banner of "action research," a notion which signified the use of participatory research to achieve a desired goal. For MacLeod the goal was CED and, more specifically, the promotion of community businesses. All of MacLeod's major research projects were oriented around action research, as noted above. At the height of his own career, MacLeod would decline opportunities for research funding that encouraged discussion in place of action, as research that was not action-oriented held no appeal and little meaning.

MacLeod's commitment to CED included not only the incubation of individual businesses, but the development of an infrastructure for incubating such enterprises. Similarly, at the university, MacLeod understood the importance of not only engaging in action research, but also the necessity for establishing an infrastructure for supporting such research. At the newly established College of Cape Breton, MacLeod was one of the champions for a research facility. Through his work with other colleagues the *Bras D'Or Institute* was founded with a mandate for investigating issues of local interest both in the sciences, and in the social sciences. In June 1977, the successful application to the Department of Health and Welfare for funds to help establish New Dawn Enterprises was (proudly) reported by the Bras D'Or Institute as part of its research activity, an action research project with a very practical and successful outcome (Johnstone, 2019 p. 55).

As the action research that would lead to the establishment of New Dawn Enterprises took place, MacLeod realised the need for a research institute with a more specific mandate, one more clearly focused on place-based

development. Convinced as he was of the role of innovation and technology in determining business success, the key for MacLeod was to find ways of harnessing technology to serve human values. Thus, it was that in 1974 a new university-based research institute, the *Tompkins Institute for Human Values and Technology*, was inaugurated, named in honour of MacLeod's intellectual mentor, Fr. Jimmy Tompkins. Forty-five years later, the Institute continues to explore links between human values and technology while maintaining a focus on issues facing the local economy (Johnstone, 2019, p. 12).

Through the formation of these research institutes and developing action research projects, MacLeod created channels through which he could effectively recruit colleagues from CBU (and other institutions) to his work of CED. MacLeod drew in a wide range of colleagues over the years, from a variety of disciplines. They included Edwin MacLellan, Gertrude MacIntyre, Walter MacNeil, Ora McManus, Rankin McSween, and Charles MacDonald His closest academic collaborator¹², however, would be Harvey Johnstone, Professor Emeritus with the Shannon School of Business at CBU who worked closely on several SSHRC funded research projects.

Action-Oriented Education

MacLeod and his colleagues were aware that to effectively engage the university as a partner in promoting CED, their research agenda needed to be complemented by an action-oriented education strategy. Specifically, there was a need to institutionalize CED education through a formal degree program (another important difference for MacLeod between Mondragon and Antigonish). Such a program could serve several functions, including creating increased awareness of CED as a viable economic development strategy; supporting (potential and actual) CED entrepreneurs and managers; and, providing a source of new faculty members with an interest in CED, both in teaching and research. Starting a degree program in a new area of studies, however, is a challenging proposition. For this reason, educational initiatives in CED necessarily lagged behind research development. The research activity of MacLeod and his colleagues, however, was laying the basis for developing educational programs.

By the mid-1990s, when UCCB was ready and eager to establish its first graduate program, MacLeod and his colleagues were well-positioned to promote an educational strategy. During a visit by Vice-president Ray Ivany to discuss graduate education, Fr. Greg was able to make a case that a distinct MBA program offered the best chance of success. As part of the plan, UCCB would establish the "Community Economic Development Institute" which would administer the proposed Master of Business Administration program specializing in Community Economic Development (MBACED) and serve as a conduit to channel university resources to community economic research projects as well (MacLeod, McFarlane and Davis 1997). In UCCB's submission to the Maritime Provinces Higher Education Commission, much of the proposal's and the university's credibility rested on the highly original CED research program initiated by MacLeod and on the ongoing impacts of the enterprises he had incubated (Keshen 2017).

CBU has offered its unique MBACED since 1997. The program was originally designed as a blended program in which students combined on-line courses with a residential requirement at CBU in the summer. Most students were practitioners and wrote their theses on projects or issues related to their home business/institution, while a smaller percentage were interested in starting their own enterprises. More recently, there has been a growth in international students, many of whom follow a full-time residential program. Among other activities, the CED Institute organizes a biannual summer conference on CED, which affords the students in the program the opportunity to present their research to an international audience of scholars and practitioners.

Today the Shannon School of Business program is offered in seven centres throughout Canada and boasts almost 1,000 alumni and over 450 current students, including full-time residential students on the CBU campus. The existence of the program has facilitated the hiring of several full-time faculty members. Faculty with research interests in CED include the current Dean of the Business School, George Karaphillis, Doug Lionais, Catherine Leviten-Reid, Kevin McKague, Patricia Morrison and Tom Urbaniak. In addition to teaching in the MBACED program, faculty members have been active locally (e.g., doing research on co-operatives/social enterprises, serving on the Board of New Dawn, etc.), as well as participating in the national co-operative research association in Canada.

Conclusion

Fr. Greg MacLeod was a lifelong advocate for the co-operative movement. Following Coady, he saw co-operatives as potentially effective vehicles through which local communities could become “masters of their own destiny.” MacLeod knew, however, that there were necessary conditions for co-operatives to fulfil this function. Specifically, they needed to maintain their democratic and participatory structures and, as businesses, they needed to adapt and innovate with changing socio-economic conditions. MacLeod recognized that a variety of other circumstances (e.g., legal, cultural, personal) might make specific legal forms of co-operative incorporation too rigid to take advantage of specific business opportunities. In such circumstances, he and his colleagues were quick to experiment with new forms, as long as they maintained a democratic decision-making structure and fostered the common good of the community (MacLeod, McFarlane and Davis 1997). While not legally co-operatives, MacLeod considered organizations such as New Dawn and the BCA Group to be “fundamentally cooperative in philosophy”, sometimes referring to them as “neo-cooperatives” (MacLeod 1991, p. 19).

From the experience of Mondragon and Antigonish, MacLeod knew that it was possible for co-operative movements to develop fruitful partnerships with institutions of higher education. For MacLeod, such partnerships were not only advantageous, but essential in depleted communities needing to constantly innovate but faced with a paucity of resources to support innovation. Particularly in its fledgling years, CBU was able to support New Dawn across a full range of entrepreneurial needs (e.g., research and development, education, strategic planning, etc.). In order for this relationship to work effectively, however, it required the creation of a dynamic and interlinked system of mutually supporting institutions. This system was facilitated by MacLeod and colleagues who, while active in founding basic CED institutions (a business incubator, a source of finance), were simultaneously establishing academic institutions (research institutes, teaching programs) with which they could collaborate. In noting that these institutions were mutually supporting, it is important to highlight that while New Dawn has benefitted from its connections with CBU, CBU has also found the relationship very valuable. The relationship has not only contributed to CBU’s strong community engagement profile, but research grants and outputs have enhanced CBU’s research reputation, while the MBACED program has spurred the university’s growth in graduate programming and internationalization.

As MacLeod and New Dawn drew heavily upon the experience of the Antigonish and MCC co-operative movements, they have also played a similar role for other organizations. In Canada, through their promotion of CED, they have arguably provided an alternative, more institutionally flexible “co-operative” approach to local economic development. In doing so, they also foreshadowed a larger international trend, with the emergence of *social and solidarity economy* movements in the 2000s. Especially popular in the Global South, these new movements were also grounded in relationships of solidarity, while accepting of institutional plurality.

References

- Cancelo, A. 2006. “Particularidades cooperativas de los procesos de globalización.” In I. Irizar (ed.), *Cooperativas, Globalización y Deslocalización*, 131-148. Mondragón: Mondragón University Press.
- Catania, J. 2006. “MCC ante los retos de la globalización” In I. Irizar (ed.), *Cooperativas, Globalización y Deslocalización*, 231-249. Mondragón: Mondragón University Press.
- CBACD MG 11.044 F6. (1973). In *Greg MacLeod Papers*. Beaton Institute, Cape Breton University.
- CBACD MG 11.044 F6. (1977). In *Greg MacLeod Papers*. Beaton Institute, Cape Breton University.
- Dodaro, S., & Pluta, L. (2012). *The Big Picture*. Montreal: McGill-Queen's University Press.
- Errasti, A.M., B. Bakaikoa, and P. Elgoibar. 2003. “The Internationalization of Cooperatives: The Case of the Mondragon Cooperative Corporation.” *Annals of Public and Cooperative Economics* 74(4): 553-584.

Etzkowitz, H., & Leydesdorff, L. (1995). The Triple Helix: University - Industry - Government Relations: A Laboratory of Knowledge-Based Economic Development. *EAAST Review*, 14, 14-19.

Father Jimmy. (n.d.). Retrieved from Pictou Antigonish Regional Library: <http://www.parl.ns.ca/projects/norajimmy/jimmy.asp>

Foster, M., Duff, R., Peters, K., & Currie, C. (2011). *Tompkins Institute – An Economic Impact Statement*. Halifax: CanMac Economics.

Johnstone, H. (2019). *Boundary Exploration: The Entrepreneurial Experiments of Fr. Greg MacLeod*, New View Productions, Sydney N.S.

Johnstone, H., & Lionais, D. (2004). Depleted Communities and Community Business Entrepreneurship: Revaluing Space Through Place. *Entrepreneurship and Regional Development: An International Journal*, 16(3).

Keshen, R. (2017, July 6). *An Interview with Greg MacLeod*. Retrieved from Cape Breton University Faculty Association: www.cbufa.ca/news2/?p=951

Lionais, D., & Johnstone, H. (2009). Building the Social Economy Using the Innovative Potential of Space. In J. McMurtry, *Living Economics: Canadian Perspectives on the Social Economy, Cooperatives, and Community Economic Development*. Emond.

Luzarraga, J., Telleria, A., & Etxebarria, I. (2007). Understanding Mondragon Globalization Process: Local Job Creation Through Multi-Localization. *First World Conference CIRIEC*. Vancouver, B.C.

MacLeod, G. (1986). *New Age Business: Community Corporations that Work*. Canadian Council on Social Development.

MacLeod, G. (1991). *The Community Business Series: New Dawn Enterprises*. Tompkins Institute.

MacLeod, G., 1997. *From Mondragon to America: Experiments in community economic development*. Cape Breton University Press.

MacLeod, G., McFarlane, B. and Davis, C.H., 1997. The knowledge economy and the social economy: University support for community enterprise development as a strategy for economic regeneration in distressed regions in Canada and Mexico. *International Journal of Social Economics*, 24(11), pp.1302-1324.

MacLeod, G., & Reed, D. (2009). Mondragon's Response to the Challenges of Globalization A multi-localization Strategy. In D. Reed, & J. McMurtry, *Cooperatives in a Global Economy: The Challenges of Cooperation Across Borders*. Newcastle: Cambridge Scholars Publishing.

Ormaechea, J. M. (2004). *El trabajo asociado ente la globalización*.

Perry, S. (1987). *Communities On The Way: Rebuilding Local Economies in the United States and Canada*. Albany: State University of New York.

Reed, D. (1999). Ethics, Community Development and Not-for-Profit Business: The Case of New Dawn Enterprises. *International Journal of Social Economics* 26(5), 660-673.

Smith, N. (1990). *Uneven Development: Nature, Capital and the Production of Space*. Oxford : Blackwell.

Tompkins, J. (1935, May). *The Technique of Democracy*. Consumers Cooperative. Retrieved from <http://www.conservativeforum.org/authquot.asp?ID=333>

Notes

¹ The Diocese of Antigonish includes all of Cape Breton in its remit.

² Xavier College, founded in 1952, was originally part of St. Francis Xavier University. In 1974, it amalgamated with the Nova Scotia Eastern Institute of Technology to form the College of Cape Breton. In 1982 when the college was granted a charter to offer university degrees, it renamed itself the University College of Cape Breton (UCCB). Following a 2004 study, UCCB made the decision to transfer its trade and technology programs to the Nova Scotia Community College, and in 2005 received royal assent to change its name to Cape Breton University.

³ MacLeod studied the history of the Antigonish Movement and was particularly interested in the writings and actions of Fr. Jimmy Tompkins. As a young priest he worked with Fr Michael Gillis, who had known Coady and Tompkins. Throughout his academic career MacLeod was in regular contact with the leaders of the St Francis Xavier Extension Department and also kept in touch with leaders of the co-operative movement including the credit union system.

⁴ Ormaechea believed that MCC's success was better explained by the priority it placed on being at the forefront of technology than its co-operative structure. He also argued that competitive pressures were forcing MCC to *redefine* its organizational structures and predicted that by “. . . 2055, among all the companies that exist, cooperatives will be recognized as something from the past, as honorable vestiges.” (Ormaechea, 2004, p. 18)

⁵ Although not formally incorporated as such, MacLeod considered CBACD (and its successor, New Dawn) to be a co-operative organization. Two of its objectives in particular illustrate why: Object 1. To search out and stimulate new ideas for the development of cooperatives, which will contribute to the social-economic improvement of the province; Object 2. To assist and advise in the establishment of cooperatives and to aid the further development of existing coops (CBACD MG 11.044 F6, 1973).

⁶ New Dawn initially offered support services to other entities with similar objectives, such as the CBACD and Shining Waters. In October 1976, CBACD passed a motion to engage New Dawn Enterprises to manage all its business affairs in return for 5% of its gross revenue. In March 1977, the Board of the CBACD began discussions that would lead to the Association being assimilated into New Dawn (CBACD MG 11.044 F6, 1977).

⁷ MacLeod and New Dawn also had a significant impact on the broader CED movement, as one of the pioneering and most successful organizations. In 1983, Fr. Greg helped to organize the Federation of Community Development Corporations of Canada (Perry 1987, p. 14) which facilitated the spread of CDCs across the country through the 1980s and 1990s.

⁸ For legal reasons BCA was not permitted to advertise or solicit funds from the public. In many cases money was raised by having individuals sign loan guarantees.

⁹ After roughly two years the Government Agency demanded return of their funds.

¹⁰ Such companies were under a legal obligation to reinvest all contributed capital in a timely manner and in ways that would benefit the local community. Individual investors who purchased shares would receive a provincial tax credit equal to 30% (now 35%) of the value of their investment. Investments up to \$50,000 per person were eligible for this tax credit.

¹¹ Antigonish and Mondragon were not necessarily opposed to government partnerships but had few practical opportunities to collaborate. During the peak activity in Antigonish, the state had not yet taken on any significant role in social and economic development. This meant Antigonish could not collaborate with the state in any substantive way. During its formative stages, Mondragon faced a very hostile state under Franco and, therefore, also

did not have any real possibilities for collaboration with government. The case of New Dawn was different. By the time of its founding there was already a welfare state in Canada which had taken on an active role in regional economic development. Moreover, governments were beginning to realize that in order to create and implement effective policy responses to the problem of unemployment, they needed to work with local actors.

¹² MacLeod also relied heavily on non-academics, including local businessmen John Eyking and Jim Kehoe who acted as key advisors and partners on many ventures.

Learning to Manage the Co-operative Difference: Saint Mary's Co-operative Management Education

Tom Webb, Adjunct Professor, Saint Mary's University

Abstract: Co-operative education is at once the most important and yet often weakly implemented of the co-operative principles. Co-operatives exist in an economy dominated by capitalist business and a capitalist business culture. Both make running a co-operative business alternative a challenge for the members and communities who own and are served by it, members of boards of directors and the management and staff who make it operate differently, as an alternative. A major gap in education has long been a graduate level education program to ensure that co-operative managers have a profound enough understanding of the co-operative business difference to make operations co-operative.

This paper looks at the emergence of a major co-operative education centre with an international impact. It recollects the environment that spawned it, an early failure, its adoption by Saint Mary's University and the Sobey School of Business, its financing, delivery decisions, course development, search for faculty, curriculum development, student recruitment, program evaluation and finally a brief look at the program as of 2018.

Tom Webb has worked as an advisor to two cabinet ministers and the Prime Minister, as a freelance consultant to co-operative business and a senior manager in Co-op Atlantic, Director of The Extension Department at St. Francis Xavier University and served on co-operative and credit union boards. Since 2001 he has worked with Saint Mary's University developing the Master of Management – Co-operatives and Credit Unions and the Centre of Excellence in Accounting and Reporting for Co-operatives. He has presented and led workshops around the world and has been a keynote speaker at co-operative meetings including the ICA Congress, The UK Co-operative Congress, The Consumer Cooperative Managers Association in Boston, and co-operative meetings in New Zealand, Australia and Scotland.

Acknowledgements: The International Centre for Co-operative Management at Saint Mary's is the logical conclusion of the initial effort to start a graduate level management education program back in 2001. It has grown as the result of the contribution and skills of dozens of people. Among them were: Sidney Pobihushchy*, a professor at University of New Brunswick, President of Co-op Atlantic and Fredericton Direct Charge Co-operative; Dr. John Chamard*, a Chair of the Management Department at Saint Mary's; Dr. Colin Dodds, a President of Saint Mary's; Drs. Larry Haiven**, Sonja Novkovic, and Daphne Rixon, Professors at Saint Mary's, and my able successor in managing and growing the program, Karen Miner. The program was served by brilliant staff work both full and part time. It also depended, especially in the early years of development, on the dedicated support of senior co-operative leaders, most notably: Dennis Deters, Barbara Turley McIntyre and Kathy Bardswick of the Co-operators, John Harvey of Co-op Atlantic, Geoff Southwood of United Farmers of Alberta, Tamara Vrooman of VanCity Credit Union, Bob Burlton**, Chief Executive of Oxford Swindon and Gloucester and later Midcounties Co-operatives, Sir Graham Melmouth**, Chief Executive of the Co-operative Group and Pauline Green**, the President of the International Co-operative Alliance. Without their contributions and those of many others, the International Centre would not exist.
*Deceased **Retired

Keywords: Education, management, purpose, values, principles

Introduction

In general, university business schools are co-operative deserts. Co-operative business models are missing from the curriculum, are seldom researched, and may even be regarded with disdain.¹ Exceptions exist. India has almost 20 co-operative colleges and the Master of the Economics of Co-operative Firms in the Department of Economics at the University of Bologna in Italy, the world's oldest university, is also a solid and remarkable example.

The other main source of co-operative education programs is co-operatives themselves since one of the seven internationally accepted principles of co-operation is education. Alas, it has been one of the more neglected principles. Co-operatives are started by a group of highly motivated people who almost always have a shared understanding of why they chose the co-operative business model. Over time, as the co-operative grows the co-op identity may be eroded by a number of factors. New members may never have experienced the circumstances or process that made the co-op model the choice of the founders. Successful co-operatives face growing competitive challenges. The value of education is seldom measured and often subject to budget cuts. As co-operatives grow, they may place less emphasis on educating workers and managers about the importance of co-operative purpose, values and principles that brought early success.

The frequent result is a co-operative led by a manager or a small management group who have little understanding of its purpose, values and principles. This can be true of even long-term managers hired from inside. A former Chief Executive of the UK's Co-operative Group, then the world's largest consumer co-operative, said over dinner, "The board of the co-op squanders the money. I make it."² He drove the organization into near bankruptcy.

This chapter examines obstacles, challenges and solutions encountered in the development of the Master of Management – Co-operatives and Credit Unions (MMCCU) in the Sobey School of Business at Saint Mary's University in Halifax, Nova Scotia from its initial exploration in 2002 through to 2016.

Co-op Atlantic, the Co-op Difference, and Co-op Education

In the late 1980s a board member of Co-op Atlantic, Sydney Pobihushchy, was raising concerns about the overall direction of Co-op Atlantic, with its growing dependence on being a discount grocer. As competition heated up in the grocery market in Atlantic Canada, this strategy had become more difficult. Competing with some of Canada's largest corporations, owned by some of Canada's wealthiest families, left the system vulnerable and fragile.³ Interest in promoting healthy food or developing an environmental program withered. Promoting local products or advertising aimed at stressing a co-operative difference lost momentum and a foray into fair trade faded. At the same time as Co-op Atlantic cut back on member education and communication in order to cut shelf prices, a major competitor, Sobeys, recognizing the power of relationship marketing, was launching a well-funded Sobeys Club. They were attempting to look like the co-operatives, while the co-operatives were focused on looking like their competition but with lower prices. The result was that more and more local co-operative stores lost money and Co-op Atlantic's accounts receivable sharply increased.

There was considerable discussion led by Sid Pobihushchy about the need to educate managers about how to manage a co-operative business. What did managers need to learn to creatively manage a business that innovated based on the co-operative difference – a business whose purpose was not to maximize profit but to meet human need; a business that embraced internationally accepted co-operative values and principles? The challenge was that many managers in Co-op Atlantic and its member co-operatives had been hired from competitors and schooled in the techniques of a business model with a different purpose. Co-operation posed tough questions whose answers could not be found by copying the competition. For example, piles of candy at the checkout might be a great disservice to mothers with young children but it boosted sales. If unhealthy food was good for margins and sales, do you promote it anyway? If encouraging impulse buying with end of aisle traps drives up sales did it matter if it did not really meet member need? Co-op Atlantic needed managers who could use resources efficiently responding to member need and long-term member interests. It needed managers with vision who could cope with competitive pressures but no co-operative management education program existed.

An opening came up for Director of the Extension Department at Saint Francis Xavier University (St. F.X.) in 1993, presenting an opportunity to develop a university-based program for co-operative managers. The task of developing a co-operative management education program faced some formidable challenges. Some co-operative managers and leaders believed that, "managing a co-operative was no different than managing any other business." Others advised that unless we could develop managers who had a profound understanding of the difference between co-operatives and capital driven business, growth would mean slow suffocation. Building that difference is crucial to

success, however, it would be a challenge getting the backing of some major associations of co-operatives and credit unions for such a program since their boards would be split.

Partly to demonstrate the value of a management approach based firmly on nurturing a co-operative difference, the St. Francis Xavier University Extension Department partnered with the Cooperative Development Institute, based in Massachusetts, to explore perceptions of co-operatives and the potential for them to market their co-operative difference. The two organizations hosted three international "Marketing Our Co-operative Advantage" (MOCA) conferences in the US in 1996, 1997 and 1998, exploring questions such as: What is the relationship between co-operative education and marketing? Does the public see co-operatives as different? When co-operatives act in line with their purpose, values and principles does it strengthen or weaken their market position? The conferences were successful and deepened the belief that MOCA was a viable strategy. The MOCA example also spurred interest in looking at other management functions.

Ideas came from many sources. In 1997, Brian Murray an accountant at Co-op Atlantic, called to ask what we were planning in terms of a co-operative approach to accounting. 'Well,' we responded, 'accounting is just accounting.' He suggested that would undermine everything we were trying to do. Accounting's purpose was to measure how effectively resources were used to achieve the purpose of the organization. If we used measures mainly focused on the use of resources to maximize the return to capital, it would undermine the core purpose of the co-operative – to meet member and community need. After reflection and consultation, we decided to develop two co-operative accounting courses.

We attended meetings to spot progressive, visionary leaders and then arranged visits to their co-operatives. As more and more progressive co-operatives made financial contributions, support from umbrella organizations grew apace. Between 1996 and 1998 over \$300,000 had been raised to develop a co-operative management education program.

While progress was evident in the co-op community, the administration at St. F.X. was not enthusiastic about a co-operative management education program. After long periods of silence and delay, they indicated their support for a program with a maximum of 6 credits – a fatal decision for the program. The funders had provided their contributions to create a program. A couple of courses was simply not acceptable, so the funds were returned to the donors.

About ten months later, in the summer of 2001 Dr. John Chamard, the Chair of the Management Department in the Sobey School of Business at Saint Mary's University, arranged a meeting with the President of Saint Mary's, Dr. Colin Dodds, Paul Dixon, the Dean of the Sobey School and Sydney Pobihushchy from the Co-op Atlantic Board of Directors. Within a half hour the program had a green light. The university would provide space and facilities and development costs would be met through fund raising. The program would have to break even but could keep any surplus for future development. The content of every course would, in the words of Dr. Dodds, be 'co-opized.' The value of the sixty percent rule would be 'proved by the exception.' A decision was also made that we would have an advisory group drawn from the co-operative sector.

The Emergence of the St Mary's Program

The approval process for new academic programs can be fraught with unforeseen pitfalls. As the program approval was being debated at Faculty Council in 2002, we encountered unexpected resistance. Fortunately, Dr. Sonja Novkovic rose to say she had just attended a major academic conference of the International Association for the Economics of Participation where the participants would have deeply envied having such a program at their universities. As an economist whose ideas were compatible with economic co-operation, Dr. Novkovic was also vital to ensuring we had a solid base of 'in house' expertise.

Dr. John Chamard, the first Academic Director, taught the program's second course on co-operative economics, and researched and wrote papers on how co-operatives were absent from the business school research and teaching. As a long-standing and highly respected member of faculty, his contribution was essential to the survival and success

of the program. He knew the university and the university knew and respected him. His untimely and sudden death in 2009 deprived the program of an intelligent and passionate supporter.

While the majority of faculty teaching in the Co-operative Management Education program did not come from Saint Mary's, the program has had strong support and participation from Saint Mary's faculty. Dr. Larry Haiven, Dr. Judy Haiven and Dr. Daphne Rixon have taught in the program. Larry Haiven and then Sonja Novkovic succeeded John Chamard as Academic Director. Professor Nicola Young and Jeff Power provided advice and encouragement. Dr. Daphne Rixon from Accounting joined the board of Centre of Excellence in Accounting and Reporting for Co-operatives (CEARC, discussed below) and eventually became the Executive Director of the organization.

Financing

The previous donors renewed commitments and new ones came on board. A meeting of supporting organizations was organized, and a decision made to create the Co-operative Management Education Co-operative (CMEC). Its key roles were to: raise funds for the program; advise on content; promote the program with the university; and recruit students. In addition to CMEC Board Chair Sydney Pobihushchy from Co-op Atlantic, other strong proponents included Dennis Deters of the Co-operators, Gerard Duggan from the Credit Union Central of PEI, Jack Christie, CEO of Northumberland Co-operative Dairy and Geoff Southwood from United Farmers of Alberta. As time went on, strong international support emerged from Paul Hazen, the CEO of the National Co-operative Business Association in the US, Charles Snyder, CEO of the National Co-operative Bank in the US, Sir Graham Melmoth, Chief Executive of the Co-operative Group in the UK, Robert Burlton, Chief Executive of Oxford Swindon and Gloucester Co-operative and Pauline Green, Chief Executive of Co-operatives UK and later President of the International Co-operative Alliance. Not counting CEARC funding, over a million dollars were raised from Canada, the US and the UK.

Delivery

Although the primary task was innovation, we initially required a review of some of the critical literature on business curriculums at the Masters' level. Notable was the analysis of Henry Mintzberg, who had suggested that, '... many MBA programs taught the wrong people, the wrong thing, the wrong way.'⁴ Mintzberg explained that graduates, fresh out of an undergraduate program, with no work or business experience were the wrong people to educate for management. Master's level students, he argued, should have several years of working in an organization. We decided that almost all our students would be accepted from applicants working in co-operatives, preferably as managers.

Mintzberg went on to critique case study models where students were given a short summary of a problem in a complex organization, economy and society and asked to come up with a solution. He still maintains, "... case studies teach them how to pronounce cleverly on situations they know little about..."⁵ We decided that, in each course, the fundamental case study in our program would be the co-operative business in which the student was immersed or, in rare cases where they did not work in a co-operative, they would find one open to allowing them to use it as a case study.

It was clear from the beginning that the courses had to be taught online. Our goal was to serve managers who were working in co-operatives and from conversations with co-operative leaders it was clear that very few were willing to leave their jobs, move and study full time. Distance education was clearly the best option. The options available with 2003 technology were more limited than we hoped. Software for delivering live stream interactive online sessions was very weak.

We also knew that online courses at the time had a 40% drop out rate. We needed to achieve a much higher retention rate over a twelve-course curriculum. To counter dropouts we decided to have a face-to-face, mandatory, one-week orientation at the university, in spite of significant additional costs for students. The bonds among the members of each cohort were renewed during the ten-day study visit. Eating, socializing and learning together during both the orientation and the study tour created deep bonds that became apparent at graduation when many students returned to the university from across North America and Europe to share their accomplishment. We were convinced that the low dropout rate achieved was due to this opportunity for students to get to know each other.

Dr. Stephen Dutcher who developed our first course on co-operative history and theory stressed the value of what he called co-operative learning and both large and small robust discussion groups. He emphasized the value of students teaching material to each other while drawing on their differing national, sector and co-operative experiences. Dr. Dutcher believed that online discussion could be more powerful than face-to-face discussion. In face-to-face it is a constant struggle to get everyone in the group involved. If discussion is a large percent of the grading, that problem disappears. In addition, in a face-to-face discussion, the contributions are almost all 'off the top of your head' – what is said is gone when the person finishes speaking. Written online contributions remain visible, are easily revisited and graded and most are more thoughtful, nuanced and analytical.

Developing the Courses – 2003-2005

Curriculum materials developed for the unique structure, qualities and dynamics of co-operatives were scarce. The three earlier international conferences on Marketing the Co-operative Advantage had generated research on innovative co-operative marketing approaches. We linked the new materials to adapted analytical frameworks in traditional marketing courses. Much has been written and there is considerable research on co-operative philosophy and history. Comparative co-operative practice and examples of best practice also offered considerable foundational material.

There has been little curriculum development on the differences in management that would reflect co-operative purpose, values and principles. Accounting and financial management, economic analysis, information technology and communications, human resource management and strategic analysis all contained ideas that were valuable but were clearly geared for a different business purpose and business model. We made a conscious decision to drive curriculum development by asking questions like, 'I know how you would do that in an investor driven business but how would it be done differently if we took co-operative purpose, values and principles seriously?'

In 2005, we held an international symposium on co-operative accounting. Participants came from five countries presenting papers from varied perspectives, but all holding to the core ideas that co-operatives needed to account for how they used their resources to meet member and community need and report, not to remote financial shareholders who vote on the basis of 'one dollar one vote', but to user members and the community. If economic democracy was to mean anything, what quantified information did members need to know? What measures did members require to understand how well their co-operative was doing at meeting member and community need? In the aftermath of this successful conference, one question continued to hover over the program 'What would the accounting community think?' We sent the papers from the symposium to Canada's then accounting standards board, the Canadian Institute of Chartered Accountants (CICA). The response was a pleasant surprise. CICA, had a program for Centres of Excellence at various universities. 'Would we,' they asked, 'submit a proposal?' The result was the creation of CEARC in 2007.

To develop a course on co-operative strategy and planning we wanted to nurture approaches that involved members whose needs were met by co-ops and for whom co-op activities were important. We wanted to engage the communities in which members and workers lived knowing that social, economic and environmental impacts on the community would affect members and workers. We wanted consumer and producer members to consider whether their relationship with workers reflected co-operative values and principles and was not exploitative. Much neoclassical theory is fundamentally at odds with the co-operative business model: co-operatives are portrayed as 'inefficient'; oil spills are valued as they contribute to GNP; and hyper-individualism ignores the dual individual/social nature of humanity. Co-operative managers must envision global co-operation as an alternative to corporate globalization.

The program would consider information technology and communications from a different perspective. Could social media and IT solutions empower members and engage them in planning and decision-making? What might the risks of new media be and what opportunities might it provide to better meet human need? How could we best ensure that in such a rapidly changing world, co-operatives thrived in the digital economy?

There was also recognition that if meeting people's needs is the purpose of the business, we need to rethink 'human resource management'. Meaningful work rewards people's skills and talents, encourages human creativity and allows people to contribute to their community. People development and leadership, a better fit with co-operative ideas, is also far more demanding and challenging.

Two additional courses rounded out the program: field research and study tours to either the superb co-operative networks around Mondragon in the Basque Country of Spain, or to the remarkable co-operative networks of Emilia Romagna around Bologna, Italy. Students needed to have their horizons expanded. The two networks are significantly different and an early decision was made that any graduate who wished to take the study visit that she or he had missed, could do so after graduation. The study visits were also opened up to a limited number of non-students from the co-operative world. The advantage of including several non-students was that the slightly higher fees allowed us to offer a special course fee reduction to a student with limited resources. A second advantage was that the non-students were often senior or innovative co-operative leaders and their participation provided students with additional insights.

The final 'double credit' course developed was a research paper. Because the papers might include commercially sensitive information about the student's co-operative, we chose a Capstone Paper designation. A thesis would have required the paper to be made public.

Although it was a challenge to adequately cover all the subjects in a twelve-course program, it was necessary to launch a program that would have a sufficient volume of students. Certain topics like innovation, governance and participation, community and environment were covered in several courses. In the last few years these topics have been part of an enriched course offering that continues to evolve.

The Faculty Search - 2002 to present

The Sobey School, like other business schools, did not have deep expertise in co-operative business. We surveyed business literature but the number of English language papers about co-operatives was exceedingly limited and the few papers that did mention co-operatives were often dismissive. The program needed well-respected academics who combined a solid background in a relevant discipline with a deep understanding of co-operatives, or at a minimum, a strong commitment to expand and deepen their co-operative research and understanding.

We assembled lists of academics associated with organizations such as the Association of Co-operative Educators, the Canadian Association for Studies in Co-operation, the ICA Research Committee, and co-operative research centres at the University of Victoria, University of Saskatchewan, University of Mondragon, University of Wisconsin, University of Bologna and the UK Co-operative College. Co-operatives UK, the Canadian Co-operative Association (CCA), and the National Cooperative Business Association (NCBA) in the US also assisted. We accessed copies of papers and presentations to determine where the best fit might be for each course.

Over a two-year period, we wrote to several dozen potential faculty members. We chose proposals with a strong focus on the co-operative difference that could adapt to the online format and met our desire to have courses with a common feel.

The Saint Mary's program was developed with the somewhat awkward name Master of Management – Co-operatives and Credit Unions. The simpler name, Master of Co-operative Management, was abandoned when a significant number of credit union managers and board members indicated they didn't think members or managers would see the program applying to them unless it specifically included the words credit union. The objectives of the program from the start were to make the curriculum relevant to all types of co-operatives and co-operative financial institutions, drawing students not just from Canada but from across the English-speaking world. We needed to ensure a wide-market to increase our likelihood of success.

These objectives appealed to a wide market but were also based on a strong belief that managers from different types of co-operatives and from different countries would provide a far richer learning experience. The final program

was a product of extensive conversations in meetings with more than a hundred co-operatives and conversations at meetings of global, national, regional and sectoral organizations in North America and Europe.

Long-term Curriculum Development

Our curriculum needed to continuously evolve ideas about how co-operatives reflect their difference. We called for papers on co-operative capital, people development, fair trade, the commons, social justice and responsibility, social co-operatives, environmental impact, governance, solidarity co-operatives and co-operative economics. Study visits deepened ties with the Co-operative Economics program at the University of Bologna, the Otorola Management Training Center in Mondragon and the University of Mondragon.

We drew on papers presented at conferences and symposia including the Co-operative and Its Workers (2006), Co-operative Legislation and Public Policy (2009) and an International Co-operative Governance Symposium (2013). St. Mary's and the ICA hosted Imagine 2012: International Conference on Cooperative Economics, a two-and-a-half-day event with more than 800 attending held in conjunction with the International Co-operative Summit in Quebec City in October 2012.

Conferences, workshops and a study visit were also held in Cuba where the Saint Mary's program has played a constructive role as Cuba becomes a global leader in what may be called co-operative socialism. In addition, the program organized a study visit to Croatian co-operatives in 2017.

Student Recruitment

The program was rolled out in 2003 and we were surprised by an enrollment of 15 students in each of the first two years, even without a strong recruitment program. We were also encouraged by the student evaluations and the low dropout rate. Low recruitment levels in subsequent years were unsettling. As we focused more on recruitment, we were disappointed that even with high positive ratings from students and a strong impact on their co-operatives, there was still strong resistance from many large co-operatives, who continued to send managers to MBA programs.

Survey research over a number of years suggested that about 30% of people liked online, 30% strongly disliked it, and the balance had mixed feelings. We also encountered a type of resistance we had not expected from Vancity Credit Union where managers were not interested because the program would limit career opportunities in investor-owned financial institutions. Vancity, however, subsequently decided to back the program, funding two full scholarships a year and making it clear to managers that the program was valued. The following year, 16 Vancity managers applied.

Another potential obstacle is nationalism – co-operators from each country want to have their own program. Despite the tendency to favour programs offered locally, many US co-operative managers did eventually join the program, often from the vibrant and dynamic retail food system. They made a substantial contribution to the learning of their colleagues.

Where corporate managers were not excited by the “co-operative difference” focus enrollments very quickly ceased. The Co-operators have played an important role in creating the program by providing solid and continuing support. The two cases of Vancity and the Co-operators clearly demonstrate that the level of commitment of senior management is crucial to co-operative education.

One of the greatest opportunities for co-operatives relates to the ‘co-operative literacy’ of their managers. Eugeniusz Kwiatkowski, a Polish politician and economist, suggests there is a cycle that leads from inception by a committed and informed group to growth based on the strength of that shared commitment and then to a decline in the level of shared knowledge and commitment, resulting in organizational decline. Whether an organization then thrives or withers depends on renewal of organizational literacy.⁶

If the co-operative nature of the organization becomes more like their capital-driven competition, there may be short-term success, but in the long run, capitalist investors will be more successful at running capitalist business. As

the difference erodes and the management shifts to serving capital, member loyalty will decline. The dynamics are a bit different in worker owned or solidarity co-operatives, but if their organizational literacy withers, their cohesion and loyalty will also erode. A core belief of the Saint Mary's program was that, if fully developed, the co-operative nature of the business would be a profound asset.

Program Evaluation

Up to 2013, student evaluations were generally quite positive, achieving ratings of 4 or more out of a possible 5. A common comment by graduates is that the program changes how they manage and is also a "life changing experience" and one expressed that "While I realize I still have much to learn from the MMCCU program, it is this program that has helped to change the way I supervise individuals."⁷

An important impact of the program is in creating change agents who deepen the performance of their co-operatives in terms of co-operative purpose, values and principles. Graduates have reported creating new programs in their co-operatives, making significant policy changes and changing structures. One consumer food co-operative, led by a graduate, adopted a living wage for new workers, transformed the co-operative into a solidarity co-operative, adopted several additional co-operative principles, improved financial health and merged with a smaller co-operative experiencing difficulties, all in a two and a half year period. The CEO credits his learning experience in the Master's program as a key driver of all the changes.⁸

The program has been evaluated as part of the Association to Advance Collegiate Schools of Business (AACSB) accreditation of the Sobey School of Business and received high marks. The University and the Sobey School also evaluate it regularly as part of program review. Feedback has included the comment that the MMCCU program has impressed leading scholars in the field of management.

Most of the students in the program are managers and only a few have gone on to other degrees including a PhD in business administration at Saint Mary's. Many have participated in additional study tours, executive education courses and conferences. Students who already had an MBA and have gone on to take the Saint Mary's program, found it significantly different and of value to their work.

The Program Today

The program has very successfully passed through a leadership generation change and has broadened its focus. It is now very capably led by Sonja Novkovic as Academic Director and Karen Miner as Managing Director. The Co-operative Management Education program now offers Graduate level program options including:

- Master of Management, Co-operatives and Credit Unions
- Graduate Diploma in Co-operative Management
- Certificate in Co-operative Management

The program also offers Executive Education including: *'Enhancing Business Performance through Co-operative Management Practices: How to Strengthen Identity, Loyalty and Participation'*; "Demystifying co-operative finance – Why it matters"; and *The Canada Development Education (DE) Workshop*. The latter is a weeklong program for credit union professionals from around the world, offered in partnership with Caribbean Development Education program (CaribDE).

Conclusions

The Saint Mary's University Co-operative Management Program has not just survived but has grown for more than fifteen years. Student recruitment has been challenging but so far successful enough to allow the program to continue. The program has developed an international reputation for its innovative and vigorous approach to analysing business skills and issues from a co-operative perspective. It has earned consistent support in terms of students from highly respected co-operatives like Vancity Credit Union and the Co-operators Insurance and was able to raise more than a million dollars over a decade from co-operative businesses. It attracted financial support from

the then Canadian Institute of Chartered Accountants, now Chartered Professional Accountants Canada, from 2007 to present for its Centre of Excellence in Accounting and Reporting for Co-operatives (CEARC).

In addition to CEARC, it has spawned the International Centre for Co-operative Management and the *International Journal of Co-operative Accounting and Management*. It has held conferences and symposia and encouraged and funded research. It continues to be a positive presence in the co-operative world. The intent was to one day have graduated hundreds of co-operative managers in co-operative businesses which would position them to build a preferred economy based on global co-operation.

That said, the program has served over 200 students and graduates from more than 100 different co-operative organizations in 11 countries. They have come from small and large insurance, fishery, credit, agricultural, retail food co-operatives, fair trade, housing and worker owned co-operatives. They have also come from co-operative development organizations and second tier organizations. More than 200 have participated in 8 study visits to the Mondragon co-operative system in Spain's Basque Country, 8 visits to the Emilia Romagna network in Northern Italy, two study tours of Cuban co-operatives and one to study co-operatives in Croatia. 152 participants from 66 diverse organizations have been involved in Executive Education programs. Small and large, worker and farmer and finance have all learned from each other.⁹

The success of the program flows from its steadfast commitment to focusing on and integrating co-operative purpose, values and principles into the vision and daily operations of co-operatives. It is rooted in the belief that co-operation is deeply embedded in the world of nature and human nature. The hope is that the program will inspire the global co-operative movement, help it to provide a preferred alternative to the destructive tendencies of corporate globalization, and contribute to a better world.

References

- Brown, L., Carini, C., Gordon Nembhard, J., Hammond Ketilson, L., Hicks, E, McNamara, J., Novkovic, S., ... Simmons, R. (Eds). (2015). *Co-operatives for sustainable communities: Tools to Measure Co-operative Impact and Performance*. Saskatchewan: Centre for the Study of Co-operatives.
- Chamard, J., & Webb, T. (2004). What? No Co-operatives in Canadian MBA Programs? Atlantic Schools of Business, 2004 Conference, Halifax, Nova Scotia.
- Chamard, J. (2003). Education for Management of Co-operatives and Credit Unions, ASBBS 2003 Conference, Las Vegas, Nevada.
- Chamard, J. & Webb, T. (2006, May 31-June 2). Managing the Co-operative Difference, CASC Conference, Toronto, Canada.
- Chamard, J., Dutcher, S. & Webb, T. (2005). The Business of Co-operative Education: Saint Mary's Universities Master of Management – Co-operatives and Credit Unions, Mondragon Co-operative Conference, Onati, Spain, June 2005.
- Chamard, J. (2004) Co-operatives and credit unions in economics and business texts: changing the paradigm. *International Journal of Co-operative Management*, Vol. 1, No. 2 pages 34-42.
- Chamard, J. & Webb, T. (2006). Hostage Taking Shows a Difference!, MMCCU Symposium, The Co-operative and its Workers, Saint Mary's University, Halifax N.S.
- Chamard, J. & Webb, T. (2006, July 13-15). The Case of the Anonymous Co-operatives, IAFEP 2006 Mondragon, Basque Country, Spain.

Corrigan, L. & Rixon, D. (2017). A dramaturgical accounting of cooperative performance indicators, *Qualitative Research in Accounting and Management*, 14(1), 60-80.

Novkovic, S. & Webb, T. (Eds.). (2014). *Co-operatives in a Post Growth Era: Creating Co-operative Economics*, London: Zed Books.

Novkovic, S. (2008). Defining the co-operative difference. *The Journal of Socio-Economics* 37, 2168–2177.

Novkovic, S. & Miner, K. (2015) *Co-operative Governance Fit to Build Resilience in the Face of Complexity*. ICA. <https://www.ica.coop/en/co-operative-governance-fit-build-resilience-face-complexity>.

Rixon, D. & Goth, P. (2017). *Credit Union Commercial Lending: Mitigating Risk Through Recording, Monitoring and Reporting*. Madison, WI: Filene Research Institute.

Rixon, D. & Beaubien, L. (2015). Sustainability Reporting: A Case Study of The Co-operators. In Brown, L., Carini, C., Gordon Nembhard, J., Hammond Ketilson, L., Hicks, E., McNamara, J., Novkovic, S., ... Simmons, R. (Eds). *Co-operatives for sustainable communities: Tools to measure impact and performance of co-operatives*, Saskatchewan: Centre for the Study of Co-operatives, 353-371.

Rixon, D. (2013). Are Co-operative Principles Reflected in Performance Reporting: A Case Study of Insurance Co-operatives. *International Journal of Co-operative Management*, 6(2), 77-91.

Rixon, D. & Lightstone, K. (2016). Impact of International Financial Reporting Standards on Canadian Credit Union. *International Journal of Business, Accounting and Finance*, 10 (1), 90-102.

Robb, A., Rixon, D., Maddocks, J. & Hicks, E. (2011). *International Statement of Recommended Practice (iSORP 6): Co-operative Non-financial Reporting*. Halifax, NS: Centre of Excellence for Accounting and Reporting for Co-operatives, Saint Mary's University.

Robb, A., Smith, J. & Webb, T. (2010, June 10-11). Co-operative Capital: What it is and Why Our World Needs It. Conference on Financial Co-operative Approaches to Local Development Through Sustainable Innovation, EURICSE, Trento, Italy.

Schugurensky, D. (2007, February 21). What knowledge is of least worth: The coverage of cooperatives and nonprofits in business and economic textbooks. Panel presentation, The Social What? Learning About the Social Economy in Ontario High Schools, Lunchbox Speakers' Series, Social Economy Centre, OISE, Toronto, ON.

Webb, J. T. (2004). From 'Human Resource Development' to 'Co-operative Relationship Development': Managing and Leading in a Co-operative Paradigm. *Journal of Co-operative Studies*, 37(3) 112. Retrieved from: S3-Webb-112.
Webb, J. T. (2006). *Workers, Consumers and Small Business: Preliminary Reflections on Stakeholders and Co-operative Values and Principles*, A Paper presented to The MMCCU Symposium: The Co-operative and Its Workers, June 2006.

Webb, J. T. (2016). *From Corporate Globalization to Global Co-operation: We owe it to our grandchildren*, Halifax, NS: Fernwood Publishing.

Webb, J. T. (2016). The Failure of Co-op Atlantic: A post-mortem on one of North America's largest co-op federations. *Co-operative Grocer*, March/ April, 2016 <https://www.grocer.coop/articles/failure-co-op-atlantic>.

Webb, J. T. (2017). Accounting for Co-operation. *Journal of Co-operative Accounting and Reporting*, December. Retrieved from: <http://www.smu.ca/academics/sobey/cearc-icar.html>.

Notes

¹ See Chamard (2003); Chamard (2004); Chamard and Webb (2004); Chamard and Webb (2006)

² Comment made over dinner, UK Co-operative Congress, 2002

³ It eventually led to its collapse. See Webb, Tom, *The Failure of Co-op Atlantic: A post-mortem on one of North America's largest co-op federations*, Co-operative Grocer, March April 2016.

⁴ The initial version of Mintzberg's comment was on a 'no longer available' CBC Ideas program from 2002. He has made a number of variations on the theme over the years. For example, <http://edition.CNN.com/2004/BUSINESS/01/28/globaloffice.mintzberg.transcript/index.html> Accessed April 23, 2018

⁵ Mintzberg, Henry, (2017) <http://www.mintzberg.org/blog/mbas-as-ceos> Accessed 26 April 2018. He expressed a very similar view in the Ideas interview back in 2002.

⁶ Eugeniusz Kwiatkowski was a Polish politician and economist, Deputy Prime Minister of Poland, and government minister in the Second Polish Republic. The author is grateful for discussions with Ryszard Stocki, a Polish academic who has collaborated with the CME program, for an understanding of Kwiatkowski's organization theory.

⁷ Comments made to the author by students.

⁸ Stories related to the author by students.

⁹ Co-operative Management Education Program (2018) *Education for Values Based Business: The Co-operative Difference Impact Report*, https://smu.ca/webfiles/8555_SSB_Co-op%20Report_Email.pdf

The University of Sherbrooke: IRECUS' History of Collaboration with the Cooperative Sector

Claude-André Guillotte, Professor, L'Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (IRECUS), École de gestion, Université de Sherbrooke
Anne-Marie Merrien, PhD candidate, Université de Montréal and IRECUS, Université de Sherbrooke
Josée Charbonneau, Research professional, IRECUS, Université de Sherbrooke
Jocelyne Champagne Racine, Associate professor, IRECUS, Université de Sherbrooke

Abstract: The history of the Research and Education Institute for Co-operatives and Mutuals at the University of Sherbrooke (*Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke, IRECUS*) is a testimony to an ongoing collaborative relationship between Quebec cooperatives and the Université de Sherbrooke. This collaboration began in 1967 with the creation of a Chair in Cooperation, and was formalized in 1976 with the adoption of the Institute's statutes, through which IRECUS became the institution we know today. This article analyses the mutual interaction between IRECUS and the cooperative sector in Quebec, distinguishing five specific periods in the history of IRECUS, each of which coincides with significant changes in the Quebec cooperative movement. In articulating these parallel developments in IRECUS and the co-operative movement in Quebec, we draw upon the notions of *organizational identity* and *paradoxes of identity*. This enables us to highlight the nature of the *paradoxes* experienced by both the cooperative movement and IRECUS and to identify the strategies that were deployed to deal with them.

Claude-André Guillotte is a professor in entrepreneurship at the Business School of the University of Sherbrooke. He is the Director of the Research and Education Institute for Cooperatives and Mutuals of the University of Sherbrooke (IRECUS).

Anne-Marie Merrien is a PhD candidate at Université de Montréal in Interdisciplinary human science, working with Inuit cooperatives in Nunavik (Northern Quebec) and at IRECUS, Université de Sherbrooke.

Josée Charbonneau is a research professional at IRECUS and a lecturer at the Business School of the University of Sherbrooke.

Jocelyne Champagne Racine is an associate professor at the Business School of the University of Sherbrooke. Her research interests focus on people management in cooperatives.

Acknowledgements: We would like to thank Darryl Reed for his acute understanding of our French-writing mindset and his meticulous and respectful copy-editing work.

Keywords: University institute, cooperatives, history, organizational identity, Québec, IRECUS

Introduction

A little over 40 years ago, the cooperative movement in Quebec mobilized to found the Research and Education Institute for Co-operatives and Mutuals at the University of Sherbrooke (Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke, IRECUS). In this article members of the IRECUS team reflect on the history of the Institute, its close collaboration with the cooperative movement, and the resulting evolution of its identity over the years. This reflection is grounded, on the one hand, in internal IRECUS documents (e.g., annual reports, minutes meetings, histories written over time) and on the other, in publications about the evolution of the Quebec cooperative movement, which allow for the contextualization of the evolution of IRECUS' identity. Analysis of these documents has led us to distinguish five specific periods in the history of IRECUS, each of which coincides with significant changes in the Quebec cooperative movement. In articulating the parallel developments in IRECUS and the co-operative movement in Quebec we will draw upon the notions of *organizational*

identity and paradoxes of identity. This will enable us to highlight some of the *paradoxes* experienced by both the cooperative movement and IRECUS and to identify the strategies that were deployed to deal with them.

Organizational identity

Like individuals, organizations can be understood to have identities. Indeed, “corporate actors” are commonly referred to (metaphorically) in daily speech as persons (Fearon, 1999). Giroux (2001) describes the personhood or organizational identity of such corporate actors as “the character of this person, that is, the set of particular traits that form the basis of the “personality” of this fictional being” (p.8). Organizational identity is constructed and constitutes, in a way, the description of the organization in relation to “what it is (values, attributes, characteristics), what it does (trade, activities), what it possesses (resources and capacities).” (Giroux, 2001, p. 16) Each of these focal points can become a constraint, vulnerability or advantage at a time of change.

According to Giroux, the construction of the identity of an organization is “the result of an interdiscursive process between stakeholders” (2001, p.6) and, during this process, the organization is confronted with the same paradoxes of identity as is an individual. Thus, identity is a relational, temporal, communicative, multidimensional, processual and paradoxical phenomenon. It is paradoxical in one sense because identity is both difference and common belonging (Dubar, 2000). This is what Giroux (2001) calls the *paradox of singularity*. A second tension exists during identity building: that between the quest for a sense of unity or coherence, despite the diversity or multiplicity on which we are constituted. This is the *paradox of uniqueness*. Finally, individuals and organizations alike are seeking “stable and idealized representation of themselves, despite the need to adapt to external circumstances and internal disorganizing impulses” (Giroux, 2001, p. 14). This is the *paradox of continuity*.

Figure 1: Paradoxes of Identity

Identity paradox	Associated tensions
Continuity	Continuity vs. change
Unicity	Unicity vs. multiplicity
Singularity	Singularity vs. isomorphism

In order to negotiate these tensions, individuals and organizations use identity strategies. An identity strategy is a “means by which individuals tend to defend their existence and social visibility, their integration into the community, at the same time as they value themselves and seek their own coherence” (Ruano-Borbalan, 2004, p. 5). These strategies make it possible to negotiate the tensions that constitute identity, namely the paradoxes of identity (Giroux, 2001). In this paper, we highlight these different tensions, paradoxes and strategies by analyzing the evolution of IRECUS’ organizational identity.

1. The Beginnings of Research and Teaching on Cooperation at Université de Sherbrooke

The creation of a Chair of Co-operation at the Université de Sherbrooke in 1967 is the prelude to a long history of collaboration between the co-operative movement and the university community. Around the time of the establishment of IRECUS, the Quebec co-operative movement was questioning its distinctive features and its role in the development of Quebec society. In short, it was trying to define its identity in relation to other actors. Up until the late 1950s, the “cooperative formula” had been the first option for Francophones to “reconquer” the national economy. For Quebec researchers at the time, “the association of owners and users made it possible to resolve conflicts between employers and employees, between distributors and consumers and more broadly to synthesize the various national interests” (Rousseau, 1996: 105). However, the early 1960s marked the beginning of a period known as the Quiet Revolution (Révolution tranquille). During this period, the Quebec state actively intervened in the economy and took “a leading role in a wide range of social and economic spheres of activity.” (Girard and Brière, 1999: 23)

The objective is [...] to increase the takeover of certain sectors of the economy, as well as to modernize the province's socio-economic structure. In this context, highly institutionalized

cooperatives benefited greatly from the support of the Quebec government during the 1960s and 1970s. The caisses populaires, which continue to consider themselves as "the heart of a vast cooperative development", are fully committed to the project of economic nationalism, which encourages them to assume a "more general mission", that of Francophone control of the Quebec economy (Parenteau, 1997, p. 15). (Lévesque and Petitclerc, 2008: 23-24)

While early Quebec researchers tended to oppose cooperatives to capitalist enterprises, the "critiques of the nationalist thesis of economic reconquest through cooperation" gave more space to the analysis of the similarities between the two business models (Rousseau, 1996: 109). Those critiques highlighted the problem of the adaptation of cooperatives to the economic context, which was mainly driven by the capitalist enterprise. From the idea of "a means for Francophones to claim economic levers for themselves", the cooperative formula was relegated "to the rank of one means among others allowing specific groups to satisfy needs" (Girard and Brière, 1999: 60). The research thus highlights the paradox created for cooperatives by the need to differentiate themselves from the capitalist enterprise and to fully integrate into the Québec economy. At the same time, significant efforts were being made to address the problem of the erosion of coop identity of cooperatives in a capitalist context. Two schools of thought were forming: one emphasizing the associative aspect of cooperation and the other, its entrepreneurial aspect (Rousseau, 1996).

It is in this context that a joint committee composed of representatives of the cooperative movement and the Université de Sherbrooke founded the Chair of Cooperation. This was initiated by the Director of the Department of Economics at the Université de Sherbrooke, the President of the Union of Regional Credit Unions of Estrie (*Union régionale des caisses populaires de l'Estrie*), and the Director General and President of the Quebec Council on Cooperation (*Conseil de la coopération du Québec*, CCQ).¹ The Chair is essentially funded by the latter two organizations (Davidovic, 1968). Its objectives were threefold: to better define the specific nature of cooperatives through research, to infuse new ideas and dynamism into the cooperative movement, and to foster succession (Pichette, 1970). From the beginning, the *raison d'être* of the Chair was based on the need for the cooperative movement to clarify its identity by highlighting its distinctive features, so as to promote continuity with the past while ensuring that it was current enough to meet the new needs of the time. To this end, the Director of the Chair undertook to set up a teaching program on cooperation and to create a research program as well.

The teaching of cooperation was not very widespread in Quebec and was completely new at the Université de Sherbrooke. Teaching initiatives on cooperation had been set up by professors from Université Laval and Université de Montréal, but university courses on cooperation were optional (Rousseau, 1996; Pichette, 1970; Davidovic, 1968). "Sherbrooke's originality may be to do so in an institutionalized and systematic way." (Pichette, 1970) In fact, other developments at the time were contributing to the formalization of cooperative education in universities. The 5th cooperative principle, relating to education, training and information, was introduced in the Declaration on Cooperative Identity of the International Cooperative Alliance in 1960 (Spain, 2008). In Quebec, the creation of the Ministry of Education and the tabling of the Report of the Royal Commission on Education in the Province of Quebec in 1964 clarified the distinction between non-formal education, also called popular education, and formal education. The former became mainly the responsibility of private organizations such as the Desjardins Cooperative Institute (*Institut coopératif Desjardins*) founded in 1963, while the latter referred "to any acquisition of knowledge that leads to academic degrees" (Barbin, 1970). Faithful to the educational intentions of its founding members and in line with cooperative principles, the Chair of Cooperation opted for an approach combining formalized teaching and civic education.

The teaching provided at the Chair of Cooperation [...] is certainly part of what can be called cooperative education and by its extensions joins popular education. In fact, the teaching we provide and the research we conduct at Université de Sherbrooke should have an impact on the entire cooperative life of Quebec; at the level of the movement, at the level of governments and at the level of the University itself. By training men who have received training in Cooperation, the Cooperation Chair, we dare to believe, contributes to the development of Cooperation because of the decisions that these men will be called upon to make, whether in governments or in the cooperative movement. (Pichette, 1970)

At that time, cooperative studies were mostly dominated by economists (Rousseau, 1996). In an effort to train cooperators, rather than specialists in cooperative economics, the heads of the Chair of Cooperation adopted, from the first course offered in 1968, a multidisciplinary perspective on cooperation, combining the perspectives of philosophy, sociology, demography, geography and economics of cooperation (IRECUS, 1996). Courses and programs that were subsequently developed would also adopt a multidisciplinary perspective. Since expertise in the teaching of cooperation was still limited at the Université de Sherbrooke, the Chair called upon European professors, such as Claude Vienney and Henri Desroche, to support the development and delivery of its first courses.

The teaching of cooperation also provided an opportunity to solicit the help of students in research on cooperatives, in particular through the production of monographs on the various cooperative sectors in Quebec or research on issues affecting the cooperative movement such as taxation. In addition to seeking a better understanding of the Quebec cooperative movement, fundamental research was being carried out to define the cooperative distinctiveness and to identify the essential characteristics that distinguish cooperatives from capitalist enterprises. The teaching provided by the university staff affiliated to the Chair and the research carried out there made it possible to engage in close collaboration with the cooperative movement. These links were reflected in the Chair's participation in various committees set up by the CCQ, its educational programs (university students and cooperative executives), its research (which focused on problems experienced by cooperatives), and the launch of the magazine *Cahiers de la Coopération* in collaboration with the CCQ (Pichette, 1970; IRECUS, 1996). In short, the activities of the Chair of Cooperation were adjusted in order to respond to the different paradoxes of identity experienced by the Quebec cooperative movement of the time: the need to differentiate oneself while contributing to Quebec society as a whole, the need to recognize oneself as a movement while taking into account the diversity of cooperatives and the need to be rooted in cooperative traditions while maintaining a relevant response to the new challenges experienced.

2. The Development of Expertise in the Teaching of Cooperation

This proximity to the cooperative movement was further enhanced when, in 1972, at the CCQ's Annual General Meeting, the decision was made to transform the Chair of Cooperation into a "complete university research and teaching organization, encompassing all aspects of the cooperative phenomenon" (IRECUS, 2003). Representatives from various departments and faculties of the Université de Sherbrooke were incorporated into a multidisciplinary committee to develop the project to set up a research and teaching institute on cooperation. At the request of and in collaboration with the Quebec co-operative movement, the Teaching and Research Institute for Cooperatives at the University of Sherbrooke (*Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke*, IRECUS) was created in 1976 within the Department of Economics of the Faculty of Humanities and Social Sciences, but with the involvement of the Department of Social Work and the Faculty of Administration (IRECUS, 2007; Program Evaluation Committee[CEP], 2005). The Institute thus replaced the Chair of Cooperation, while ensuring continuity with its work. Its purpose was to design and carry out multidisciplinary teaching and research programs in the field of cooperation, to promote publications and student field research on cooperation, to make existing documentation accessible and to organize conferences, seminars and symposia (IRECUS, 2003).

From its inception, IRECUS' governance structure has been designed to allow the cooperative movement and the academic community to jointly decide on its activities. An Advisory board was set up, composed of the Director of IRECUS, a representative from each of the Offices of the Deans of the main Faculties to which the Institute was attached and representatives of the cooperative movement. The committee's scope of action was to advise the Deans in regard to the structure of the Institute, the academic programs and the research priorities. A Steering committee was also established. The latter was composed of the Director of IRECUS and university representatives. It advised the Director on matters to be submitted to the Advisory board and on the Institute's education, research and community service programs. Shortly after its foundation, nearly 30 academics were engaged in IRECUS activities (IRECUS, 2003). In 1979, the first ever certificate in cooperative management for cooperative executives launched. This was followed in 1980 by the introduction of an intensive executive development program for cooperative leaders. That same year, the Institute was also devoting its efforts to the development and implementation of a Master's Program in Co-operation, with the first cohort being welcomed in the fall of 1981

(IRECUS, 2007). The Master's in Cooperation (*Maîtrise en coopération*) offered by IRECUS was the first Canadian graduate degree program specifically focused on cooperatives (Girard and Brière, 1999: 33).

The parallel evolution of research and teaching on cooperation and cooperative concerns testifies to the close relationship between cooperative and academic actors in Quebec and their mutual influence on each other. During the 1970s, as a certain division was observed within the *national* cooperative project, a similar split was also apparent among academic schools of thoughts. During this period, three main research perspectives on cooperatives emerged (Rousseau, 1996). A first point of view tended to divide the cooperative movement between a well-established institutional sector, composed of traditional cooperatives, and a sector that is conducive to social transformation, composed of a new generation of cooperatives involved in the emerging sectors of the time (Rousseau, 1996). The latter "clearly fall[s] within the scope of cooperation, [but] borrow[s] from the associative formula to carry out projects relating to quality of life, work, the environment and culture" (Lévesque and Petitclerc, 2008: 25). According to researchers adhering to this view, tensions between mature cooperatives and "new cooperatives" derived from their different social projects, with traditional cooperatives still supporting the idea of economic nationalism, while new cooperatives were engaged in an alternative social project aimed at "living and working differently" (Lévesque, 2011: 26).

The second major research point of view aligned with the problem raised earlier concerning the adaptation of the cooperative model to an economic environment driven by the capitalist model. It suggested that the principles of cooperative organization make it a particular type of enterprise, but that without an appropriate management model, cooperatives were likely to "switch to the capitalist side." For these researchers, the founding principles of cooperatives are likely to be threatened unless separate management principles and development strategies are adopted by the cooperatives. In this context, the cooperative enterprise constantly faces the need to remain competitive while preserving its democratic vitality (Rousseau, 1996). This view would be reinforced during the 1980s, when "some cooperative networks, under the constraint of fierce competition, have disappeared or become marginalized [and] others have resisted, but occasionally at the cost of organizational transformations or strategic orientations questioning the cooperative identity." (Girard and Brière, 1999: 61)

Finally, the third point of view, the one with which IRECUS was more closely identified and in line with the older tradition of research, stipulated that there are fundamental differences between cooperatives and capitalist enterprises. Some researchers were interested in the cooperative structure as the main element of differentiation, while others considered the founding principles of cooperation to be the most distinctive feature. Despite having different starting points, both perspectives used the associative aspect of the cooperative model to explain how the co-operative form was intrinsically distinct from capitalist enterprises and the public sector (Rousseau, 1996). This view of cooperation also underlaid the educational programs offered by IRECUS. Despite "the pressure and combined effects of disciplinary specialization" which tended to fragment cooperative studies according to their analytical dimensions and sector of activity (Rousseau, 1996: 112), IRECUS took a multidisciplinary and comprehensive approach to cooperation. Indeed, within the framework of the newly offered Master's Degree in Cooperation offered by IRECUS, "cooperation is approached from the angle of sociology, economics, administration, law, psychology and philosophy." (IRECUS, 1996: 9) This multidisciplinary approach was and would continue to be a strong and enduring identity marker of IRECUS as an organization.

In the following years, IRECUS would consolidate and build on the expertise developed in the teaching of cooperation, particularly through numerous collaborative projects funded by the Canadian International Development Agency (CIDA) to support the design and delivery of university education programs in Africa and Latin America (IRECUS, 2007). Nevertheless, the tensions arising from the paradox of unity and multiplicity within the cooperative movement in the 1970s would continue to unfold in the 1980s and would have repercussions on IRECUS' activities in Quebec.

3. A Period of Great Change

During the 1980s and 1990s, Quebec faced significant challenges.² In the early 1980s, the economic crisis led to a significant increase in interest rates, while unemployment rates reached levels not seen in several decades (Girard and Brière, 1999). During this period, the government put in place resources to facilitate the creation and

capitalization of cooperatives, with a particular emphasis on employment generation. On the basis of the number of jobs created or maintained, the government financed regional development cooperatives (RDCs) whose mission was to promote and support cooperative development and foster regional intercooperation (Lévesque and Petitclerc, 2008). It was also in this context of the economic crisis and the emphasis on employment creation that various amendments were made to the Cooperatives Act. As Girard and Brière point out, "In 1983, it is worth noting the introduction of elements to facilitate the recognition of worker cooperatives [and] worker shareholder cooperatives." (1999: 28) Also, in 1985 the Cooperative Investment Plan (CIP) was introduced to stimulate the capitalization of workers and producers' cooperatives (Girard and Brière, 1999; Lévesque and Petitclerc, 2008).

The split that had already emerged within the cooperative movement in the previous decade continued to grow. The movement still seemed to lack a broader social project to bring together the federated cooperatives, whose presence dominated the CCQ, and the new cooperatives that were promoting an alternative society project (Lévesque and Petitclerc, 2008: 26). For some, the national conference held in 1980, featuring the theme, "The cooperative enterprise in economic development," confirmed the existence of two separate cooperative projects in Quebec.

The first project, supported by federations and cooperatives of previous generations, is still the economic nationalism supported by the government, regardless of which party is in power. The second project, put forward by civil society initiatives in the field of living conditions and job creation, challenges economic nationalism in the name of an alternative project of society, probably itself plural, as are the new social movements (Bélanger and Lévesque, 1992). In this perspective, the "most radical wing" of the "new cooperatives" challenges the development strategy of the "structured cooperatives", which are accused of "sleeping with the enemy" by contributing to the development of private enterprise, in accordance with economic nationalism, and of neglecting to invest in the development of cooperatives. (Lévesque, 2011)

In the first half of the 1980s, the CCQ thus experienced the "darkest, most trying, but also most erratic period" in its history (Lamarre, 1991, p. 115; quoted in Lévesque, 2011: 29). The low level of representativeness was evident in the fact that three-quarters of the members of its board of directors come from the insurance and credit sectors, while the majority of non-financial cooperatives, without sectoral federations, were not represented at all (Lévesque, 2011). Cooperative bankruptcies also called into question the solidarity of the cooperative movement, since intercooperation was "of no help to cooperatives in difficulty" (Lévesque, 2011: 27). Cooperative liquidations, mergers and transformations followed one after another.

This began a period of in-depth questioning for the CCQ regarding its membership and activities. The CCQ abandoned its international component, which led to the creation in 1985 of a separate organization, the Cooperative Society for International Development (*Société de coopération pour le développement international, SOCODEVI*). At a CCQ conference in 1987, the President of the Caisses Desjardins reiterated that cooperatives had arrived "at a time when it is necessary to verify the depth of their cooperative project" (Béland, 1987: 20; quoted in Lévesque, 2011: 29) and proposed holding the General forum on cooperation (*États généraux de la coopération*) that would take place between 1990 and 1992. The CCQ then began a process of wide-ranging consultation and mobilization of the cooperative movement (Girard and Brière, 1999).

The Conseil de la coopération du Québec entered into a relaunch operation, focusing on improving coordination and networking, revitalizing training and providing better financial support to cooperatives. This allowed the cooperative, mutualist, trade union and associative components to recognize themselves and affirm their common will to take up the challenge of globalization and move the new economy in a direction that could lead to a renewed social democracy. (Lévesque and Petitclerc, 2008: 26, our translation)

The holding of the Employment Forum from 1987 to the early 1990s had already fostered some degree of convergence among these actors. By bringing together both "unions and all the components of the social economy, [it] has been a pivotal experience of concerted action for employment that has fostered regional and local

initiatives.” (Lévesque, 2011: 30, our translation.) The mid-1990s “marked a historic turning point that made cooperatives, mutuals and associations engaged in economic activities aware of a kinship and produced a willingness to work together to develop common tools and even a common vision.” (Lévesque and Petitclerc, 2008: 27, our translation.) The unity and coherence of the movement was thus promoted under the language of a “social economy,” which aimed to bring together a greater number of actors, despite the rather significant diversity amongst them.

During this period, IRECUS’ activities also diversified. In addition to the growing number of its international collaborative projects, which were plentiful between 1980 and 2000, IRECUS continued to promote and support cooperative development in Quebec. In 1984, the Regional Development Cooperative of Estrie (*Coopérative de développement régional de l’Estrie*, CDR-Estrie) was established. IRECUS had actively participated in the 1970s in the promotion of a regional intercooperation organization in Estrie, but its efforts had not been successful (CDR-Estrie, 2013). Given this history, IRECUS has had a seat on the governing board of CDR-Estrie from its inception to this day. In collaboration with CDR-Estrie, IRECUS has developed an array of services on offer for cooperatives: cooperative management consulting activities, action research, the use of its resource bank and student resources (e.g., to contribute their reflections on local issues through writing cases, theses, and related academic work) (IRECUS, 2007). A number of conferences and symposiums were also organized, including the symposium “The Quebec Cooperative Project, a Social Project (*Le projet coopératif québécois, un projet social*)” in 1982 and a 5-day symposium on cooperative-state relations, which brought together more than 300 speakers from Europe, Asia, Africa, North America and Latin America in 1986.

IRECUS’ close ties to the cooperative movement would once again influence its teaching and research programs during this period. Its statutes indicate that the representatives of the cooperative movement who sat on its Advisory board were all appointed by the CCQ. These members, therefore, generally came from the so-called structured or traditional cooperatives. As many cooperatives had been affected by bankruptcies, liquidations, mergers and other major transformations during this period, the need to re-appropriate tools and knowledge that corresponded to a cooperative management approach was becoming more pressing. At the end of the 1980s, the Master’s in Cooperation became the Master’s in Management and Cooperative Development (*Maîtrise en gestion et développement des coopératives*). As the promotion materials indicated, “The program aims to provide the student who already has a specialization in a relevant core discipline with complementary multidisciplinary training applied to cooperatives.” (IRECUS, 1996: 10, our translation.) Less than five years later, IRECUS was again revising the Master’s program “to ensure that the graduate’s profile meets the future needs of the labour market.” (IRECUS, 1996: 10, our translation.) Two concentrations were introduced, cooperative project management and the development of cooperative organizations. At the same time, a for-credit off-campus training program was developed, followed by a certificate in cooperative management offered as part of the multidisciplinary bachelor’s degree in the Faculty of Humanities and Social Sciences at the Université de Sherbrooke. “The certificate is distinguished by its contents, methods and schedules which are adapted to the training needs and learning realities of cooperative practitioners, as well as by being offered in different regions of Quebec.” (IRECUS, 1996: 10, our translation.)

In 1996, IRECUS was transferred from the Faculty of Arts and Humanities to the Faculty of Administration (Université de Sherbrooke, n.d.). Several professors in this faculty were already involved in the Institute’s research and teaching activities, so the transfer made it even easier to reorient the Master’s program towards the management of cooperatives. This reorientation led to an increase in registrations (confirming the relevance of the new specializations) and a more effective response to the growing management challenges faced by cooperatives (Prévost, 2019). The following year, in response to the need to further develop cooperative research, a research pathway was added to the Master’s degree. Finally, starting in 1999 a part of the Master’s degree program was offered part-time in Longueuil, near Montreal.

4. A Marked Passage towards Local Development

In 1999, the Government of Quebec launched its *Policy of support for local and regional development*, which led to the creation of 110 Local Development Centres (*Centres de développement local, CLD*). Among their responsibilities were the development of a concerted local action plan for the economy and employment and the elaboration of a

local strategy for the development of entrepreneurship and enterprises, including social economy enterprises (Joyal, n.d.). Those plans and strategies could eventually lead to stronger support for non-financial cooperatives as nearly 60% of them are active in "[...] regions other than Montreal and Quebec" (MDEIE, 2007; quoted in Lévesque, 2011: 35, our translation.) The trend towards decentralization of development strategies combined with the recognition of the social economy – reconfirmed by the creation of the Chantier de l'économie sociale in 1999 – has led to a proliferation of university research on social economy and local development topics and the creation of multiple research centres interested in them (Lévesque and Petitclerc, 2008; Angers *et al.*, 2008). In this context, a growing number of cooperatives realized that they needed to root themselves more in the local dynamics (IRECUS Info, 2001). IRECUS became a privileged partner to do this.

In 1998, IRECUS hosted the McConnell Chair in Local Development whose mission was to “support socially and economically challenged communities and stimulate research to develop transferable models.” (St-Martin, 1999, our translation.) The professionals associated with this Chair supported citizen committees and stakeholders already involved in their communities so that they could take charge of their socio-economic environment and improve their living conditions. Based upon the research on this topic, the Chair aimed to develop models that could be used in other communities (St-Martin, 1999).

The following year, the Desjardins Group and local credit unions provided funds to create the Desjardins Chair for Cooperation and Community Development, which was also attached to IRECUS. At that time, the Desjardins Group supported several research chairs and, without it being publicly known, was the largest donor in Quebec. At the same time, however, several people within Desjardins were questioning “the fact that funds and sponsorships are paid out without a long-term vision.” (Lord, 2005, our translation.) Therefore, the Desjardins Credit Unions decided to transform themselves from being simply funders to becoming local development actors. To support this transformation, the Chair was to “enhance cooperation as a management model in the private and public sectors, as well as to support, document and question Desjardins’ evolution with respect to its contribution to local and regional development.” (Lord, 2005, our translation.) To achieve this, IRECUS had to document Desjardins’ involvement in its community and provide support for its work in establishing priority partnerships with local stakeholders and implementing pilot projects in certain regions (Lord, 2005; Angers *et al.*, 2008). This partnership between Desjardins and IRECUS allowed the latter to devote more time to do research on cooperatives in Quebec and their contribution to improving the living conditions of communities. The Chair at this stage comprised about ten professors and students (Angers *et al.*, 2008).

In 2000, a Centre of Excellence in Local Development Management was established in the Faculty of Administration. IRECUS provided the management for this Centre. In addition to assembling the work of researchers from IRECUS, the Local Development Research and Education Group and the Venture Capital Research Group, it also brought together the teams of the McConnell and Desjardins Chairs. The mandate of the Centre of Excellence was “to support basic and applied research as well as action research, and to ensure that it benefits Quebec society and the world.” (Peloille, 2000, our translation.) It focused on cooperatives, but also investigated local taxation, public finance, public management, high technology, venture capital, development, entrepreneurship and health and social services management (Peloille, 2000). In order to promote research on the transferability of individual entrepreneurship to collective entrepreneurship, self-management and awareness at work, the Quebec Federation of Worker Cooperatives (*Fédération québécoise des coopératives de travail*) also contributed to the Centre's funding (IRECUS Info, 2001). Meanwhile, IRECUS representatives sat on various committees and boards of directors related to the cooperative movement.

This diversification of IRECUS’ fields of action led once again to the modification of its Master’s program. In addition to professional and research paths, three additional concentrations were added: cooperative management, local development management and international cooperation and development management. The name of the degree was changed to the Masters in Cooperative and Community Development Management (IRECUS, 2003). Two new master’s programs were also made available, one full-time and one part-time. Specializations in local community development management or international cooperation and development management were offered to registered students. The addition of these new programs enabled IRECUS to better meet the specialized training needs of professionals already in the labor market (IRECUS Info, 2001).

In the early 2000s, IRECUS abounded in activities related to the management of cooperatives and increasingly to local development. A lot of research was conducted in partnership with the Quebec cooperative movement, which was now more interested in the contribution of cooperatives to local development and less on the distinctiveness of the cooperative model, as was previously the case. The results of this research were disseminated in the form of publications, conference presentations, seminars and symposia, dissertations and theses (IRECUS Info, 2001). International academic collaborations also played a significant role in IRECUS' work, as a result of the international links that had been forged during the 1990s. IRECUS played a leadership role within the Network of Universities of the Americas in Cooperative and Association Studies (UniRcoop), which comprised 22 member universities from 15 countries in the Americas and received funding from the Canadian International Development Agency (CIDA) (Angers *et al.*, 2008). These activities were reflected in the teaching of IRECUS, which extended across co-operative management, community development and international co-operation. This increasingly wide dispersal of its energy would soon require IRECUS to refocus its activities on cooperative research and education.

5. The Time for Questioning

After only a few years of activity, the links between IRECUS and the two Chairs were interrupted. Indeed, the holders of the two Chairs left IRECUS to take up new positions within the Faculty (IRECUS, 2007). At that point, most of IRECUS' activities were related to its collaboration with Latin American universities and teaching. While CIDA provided funding to carry out its international projects, it became more difficult for IRECUS to fund its research activities in Quebec, even though the Policy on the Recognition of Research Centres and Institutes of the Université de Sherbrooke, adopted in 1996, placed research and education at the heart of its institutes' development strategy (Université de Sherbrooke, 1996). In addition, the multiplication of pathways and options related to the Master's degree, amplified by the influence exerted by funders, had gradually led to a reduction in cooperative content (CEP, 2005). Under these conditions, and in order to renew the partnership relationship that had linked IRECUS to the Quebec cooperative movement since its inception, a new formulation of IRECUS' mission and statement of functions was proposed in 2002. The IRECUS Advisory board and Steering committee affirmed that it was a university research and education institute dedicated to cooperatives, their management and development in their specific environment, first nationally, then internationally. IRECUS was now pursuing its international activities through closer collaboration with SOCODEVI. Finally, the field of mutuality was officially added to its fields of interest (IRECUS Info, 2002). In 2005, upon endorsing these new orientations, IRECUS became the Research and Education Institute for Cooperatives and Mutuals of the Université de Sherbrooke, maintaining the same acronym (IRECUS, 2006).

The teaching provided by IRECUS was also affected by this reframing. Although the management of the Master's programs associated with the Faculty of Administration was taken over by the Masters' Directorate, IRECUS conducted consultations with the cooperative community to identify its concerns. A Program Evaluation Committee (PEC) was formed to clarify how to integrate the new orientation into each of IRECUS' areas of teaching activity (IRECUS Info, 2002). The first evaluation of the Master's program was also undertaken. Among the findings, the PEC pointed out that just under 7% of IRECUS graduates of Quebec origin were hired by the cooperative sector – compared to nearly 67% for students from other countries – and that the largest proportion of jobs obtained by Quebec graduates (32%) were in the government sector. The Advisory board, composed of representatives of the Quebec cooperative movement, specified the need to refocus the content of educational programs on cooperative management and, secondly, on cooperatives in community and local development. It thus raised the need to train managers capable of analysis and action in a cooperative context. Finally, they found regrettable the lack of resources committed to research, pointing out that student engagement was beneficial to the community (CEP, 2005).

This new orientation was further enhanced in 2008 with the inclusion of the mutual sector in its Master's program – which in 2008 became the Master's of Management and Governance of Cooperatives and Mutuals – and the introduction of an undergraduate course in administration on different approaches to the management of cooperatives. In 2010, a new initiative involved the offering of executive training programs through the Laurent-Beaudoin Continuing Education Centre. The response to the new Master's program, however, was mixed. In 2009 and 2011, the program was not offered due to a lack of registrations (IRECUS, 2010; 2012). The program was offered again until 2014, before being integrated into the Master of Business Administration (MBA) in 2015, under a

concentration in the Management of Cooperatives and Mutuals. After two years, this concentration was also suspended due to a lack of registrations. Several factors then seemed to work against offering cooperation education programs in institutions of higher education. First, cooperative management programs are generally not highly valued and receive little support from the cooperative movement, as they are typically not part of the core elements of the professional development of cooperative members, employees and leaders (Miner and Guillotte, 2014). Combined with limited employment opportunities, these factors severely restricted the potential for student recruitment. In addition, more registrations per cohort were now required to start a new program at the Université de Sherbrooke (IRECUS, 2015). Finally, there were fewer and fewer teachers specializing in cooperative management or interested in the cooperative model (CEP, 2005).

Nonetheless, IRECUS' research activities received a new impetus from 2008 onwards. Its project "Management Tools Based on Cooperative Identity", which aimed to develop and deliver a series of workshops on cooperative differentiated management and strategic analysis to cooperatives in the agriculture and forestry sector, received funding from the Social Sciences and Humanities Research Council of Canada. A grant from Agriculture and Agri-Food Canada's Co-operative Development Initiative program was also procured to conduct research aimed at analyzing the role of networks in creating value added in the agricultural cooperative sector (IRECUS, 2016). Finally, 2008 marked the beginning of the Community-University Research Alliance on Territorial Development and Cooperation, which aimed to analyze the participation of cooperatives and mutuals in territorial development. This initiative, of which IRECUS was a part, was set up by six Canadian universities, the Quebec Council for Cooperation and Mutuality (*Conseil québécois de la coopération et de la mutualité*, CQCM, the former CCQ) the Network of Quebec Community Development Assistance Corporations (*Réseau des sociétés d'aide au développement des collectivités du Québec*), the Association of Local Development Centers (*Association des centres locaux de développement*) and the Quebec Federation of Municipalities (*Fédération québécoise des municipalités*). Subsequently, a new collection of IRECUS Papers was published online, in addition to the publications already made available (IRECUS, 2016; Angers *et al.*, 2008).

IRECUS' efforts in terms of research development culminated in the creation of the Chair in Cooperative and Mutual Management and Governance in 2010. It aimed to "better understand the identity of cooperatives and mutuals and their links with sustainable development, in order to design management tools specific to this identity." (Université de Sherbrooke, 2010, our translation.) These management tools were to be disseminated to the academic community, practitioners and students. Created at the Faculty of Administration, the Chair received direct support from the community: Agropur Cooperative, La Coop fédérée and some of its members, the Co-operators Group and the Quebec Federation of Funeral Cooperatives (*Fédération des coopératives funéraires du Québec*) are among its financial partners (Université de Sherbrooke, 2010). Representatives of the cooperative movement were to determine the priorities of the Chair. The funding obtained made it possible both to strengthen the existing IRECUS team and to recruit new researchers (University, 2010). In the following years, the number of research projects would be up and a large number of educational workshops and training courses were offered to the cooperatives making up the IRECUS network. The Institute also benefited from the excitement generated by three International Cooperative Summits held in Quebec, for each of which IRECUS conducted a research project, at the request of the organizing committee.

Current Situation, Challenges and Possible Solutions

The suspension of IRECUS' teaching programs in recent years has resulted in a significant reduction of its teaching activities related to the cooperative model. As a result, the number of its teaching staff and students likely to contribute to research or form the next generation of cooperative leaders has also declined. Although IRECUS now has a rather small team, the multidisciplinary and complementarity of the people who make up this team remain an asset. Despite the suspension of its teaching programs, an unprecedented five doctoral students affiliated to IRECUS have been conducting or have conducted research projects on cooperatives over the past five years. Nevertheless, without graduate programs specific to the cooperative model, whether at the Université de Sherbrooke or elsewhere in Quebec, cooperative research and education seem to have been compromised.

The close link between teaching and research also has had an impact on IRECUS' ability to financially support its research activities, which now rely more heavily than before on research professionals, which availability is contingent on the financial resources of the Institute. The IRECUS Interdisciplinary Research Fund, which replaced the Chair in Cooperative and Mutual Management and Governance in 2014, aims to solicit funding from cooperative and mutualist actors for its research activities, in addition to pursuing more specific research grants. This search for funding, with which many research centres struggle, requires significant time and effort.

Fortunately, IRECUS can count on the support of its Advisory board, which is now made up of 12 members, 10 of which are from Quebec cooperative and mutual organizations, to reflect on strategies to ensure the continuity of its activities. This close relationship, which has been maintained over the years, contributes at the same time to ensuring consistency between the activities carried out by IRECUS and the aspirations and needs of the Quebec cooperative and mutualist movement. On the occasion of the 40th anniversary of the creation of IRECUS, the Advisory board and the permanent team conducted a strategic planning exercise during which IRECUS confirmed:

its commitment to the adoption of a viable organizational structure that enables the diversification of funding sources and the mobilization of the largest number of stakeholders, the increase of its visibility in Québec, Canada and internationally, its contribution to the ongoing development of theoretical and practical knowledge about cooperatives and mutuals and its active role in cooperative and mutual education in Quebec. (IRECUS, 2016: 10, our translation)

This commitment reflects the main challenges facing IRECUS – and other centres for research and teaching on cooperatives as well – namely, ensuring the next generation of cooperative researchers and teachers, developing a relevant university education program on cooperatives and mutuals and securing funding for such a program. All this needs to be done while maintaining a balance between research, teaching and services for the cooperative and mutualist movement.

Based on these observations, some solutions are currently being considered. First, IRECUS wishes to get closer to other university centres and institutes interested in cooperation and mutuality, in Quebec as in Canada. This process includes formalizing and diversifying its partnerships in order to open up its research horizons and foster the development of joint university education programs that can respond positively to the needs of tomorrow's researchers, professors and practitioners. This cooperation strategy also aims to consolidate the construction and dissemination of knowledge relevant to the cooperative and mutualist movement by pooling complementary expertise. In addition, IRECUS continues to promote the cooperative model through teaching activities in courses not specific to cooperatives and maintains close links with its cooperative and mutualist partners through customized training, conferences and studies, and through its participation in various cooperative and mutualist committees.

Over time, IRECUS has remained true to what it is, in terms of its values and characteristics. The key elements that have remained constant are the multidisciplinary and participatory approach to research, the close links with the cooperative community, and the deep conviction that cooperatives require specific theoretical, management and governance tools. This coherence and constancy in its identity are essential elements in maintaining the balance between its different areas of activity.

Conclusion

In the field of cooperative studies, many researchers have examined the cooperative identity in order to better identify, understand and differentiate cooperatives from other forms of enterprise. These reflections have fueled a number of debates and numerous publications that testify to the paradoxes that have forged Quebec's cooperative identity. Cooperative studies have attempted to assert the singularity of the cooperative model and to highlight how it differs from associations, capitalist enterprises, and so on. Such studies have anchored themselves in the past to understand the initial cooperative project, while welcoming changes within and outside the cooperative movement. They have attempted to unify cooperative thinking and theory through the establishment of common values, principles and practices while recognizing the diversity of sectors, structures and sizes of cooperatives.

As the cooperative sector has changed over the years, IRECUS has also had to (re)define its organizational identity, which is itself deeply influenced by the very evolution of the cooperative identity. The Institute has faced several paradoxes of identity that have at times necessitated a reframing of its mission and/or activities, or a reaffirming of its past. Obviously, when a new organization is set up, it must position itself in relation to its environment, to its characteristic features and its usefulness. Throughout its existence, IRECUS has positioned itself in relation to the university community and the cooperative movement. Born of a will and effort from the “field” and led by an Advisory board made up of representatives of the cooperative movement, IRECUS still has to justify its place in the research and teaching community today. Changes in membership in different faculties and departments clearly demonstrate a kind of ambiguity about the place of IRECUS – and cooperative research in general – in the academic community. The multidisciplinary nature of IRECUS, from its inception, illustrates this tension between a need for unity and coherence of the Institute, as well as a recognition of the importance of diversity within the Institute itself. It seems that IRECUS has chosen to affirm and even capitalize on this internal multidisciplinaryity and its close link with the practice environment. This privileged relationship ensures that IRECUS is directly influenced by the changes experienced by the cooperative movement. Indeed, this influence is visible with respect to all IRECUS' activities; at one time or another in its history, IRECUS has focused on either research and teaching or community service activities to meet the needs of the cooperative movement. It also has an impact on what IRECUS has owned or possesses in terms of financial and logistical resources, staff and capabilities in general. Ultimately, this relationship with the cooperative movement has had and will continue to have an impact on how IRECUS lives out its core identity, i.e. as a research and education institute FOR cooperatives and mutuals.

References

- Angers, K., Beauregard, J.-P., Goulet-Cloutier, C. et J. Leblanc (2008). « Portrait de la situation en matière de recherche scientifique pour l'économie sociale du Canada », *Cahier de la Chaire de recherche du Canada en économie sociale*, no R-2008-02.
- Barbin, G. (1970). « Vingt-cinq mille personnes après... », *Le mouvement coopératif du Québec et l'éducation des adultes*, Les Cahiers de l'Institut Canadien d'Éducation des Adultes, Collection : Forces Vives, no 8-9.
- Comité d'évaluation de programme (2005). *Maîtrise en gestion du développement des coopératives et des collectivités, Document-synthèse*, IRECUS.
- Coopérative de développement régional de l'Estrie (2013). *Mémoire, Projet de loi-cadre sur l'économie sociale au Québec*, 11 p.
- Daneau, Y. (1970). « Le Conseil de la coopération du Québec », *Le mouvement coopératif du Québec et l'éducation des adultes*, Les Cahiers de l'Institut Canadien d'Éducation des Adultes, Collection : Forces Vives, no 8-9.
- Davidovic, G. (1968). *General Picture of University Teaching of Co-operation*, 17 p.
- Dubar, C. (2000) *La crise des identités. L'interprétation d'une mutation*, Paris : PUF.
- Espagne, F. (2008). *Principes coopératifs ? Lesquels ? Histoire et lecture des principes coopératifs selon l'Alliance Coopérative Internationale*, 28 p.
- Favreau, L. (2010). *Mouvement coopératif. Une mise en perspective*, Québec : Presses de l'Université du Québec, 168 p.
- Fearson, J.D. (1999). *What is identity (As we now use the word)*, Stanford University. Retrieved from: <https://web.stanford.edu/group/fearon-research/cgi-bin/wordpress/wp-content/uploads/2013/10/What-is-Identity-as-we-now-use-the-word-.pdf> (accessed on June 21, 2019).

Gagnon, B., Palard, J. et A.-G. Gagnon (2006). *Diversité et identités au Québec et dans les régions d'Europe*, Québec : Les Presses de l'Université Laval, 420 p.

Girard, J.-P. et S. Brière (1999). *Une identité à affirmer, un espace à occuper : aperçu historique du mouvement coopératif au Canada français*, Chaire de coopération Guy-Bernier et Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke, 75 p.

Giroux, N. (2001) « La gestion discursive des paradoxes de l'identité », Xe conférence de l'Association internationale de Management Stratégique, juin 2001. Retrieved from: http://www.resilience-organisationnelle.com/pj/identite_personnelle_et_organisation.pdf (accessed on June 21, 2019)

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2016). *Historique de l'IRECUS 1976-2016*, 14 p.

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2015). *Procès-verbal des assises annuelles de l'IRECUS*, 10 juin 2015.

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2012). *Rapport annuel 2011-2012*, 33 p.

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2010). *Rapport annuel 2009-2010*, 26 p.

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2007). *Historique de l'IRECUS 1976-2006*, 23 p.

Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (2006). *Rapport annuel 2005-2006*, 34 p.

Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke (2003). *Historique de l'IRECUS et de ses programmes de formation. Historique de la Chaire de coopération et de l'IRECUS (1967-1996)*, 19 p.

Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke (2001). *Règlements généraux*, Université de Sherbrooke, 6 p.

IRECUS Info (2003). *Bulletin d'information de l'Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke*, Vol. 4, No. 3, Automne 2002.

IRECUS Info (2001). *Bulletin d'information de l'Institut de recherche et d'enseignement pour les coopératives de l'Université de Sherbrooke*, Vol. 4, No. 1, Printemps 2001.

Joyal, A. (s.d.) « Le développement local au Québec : quelques enseignements pour l'Amérique latine », Texte s'inspirant de Joyal, A. (2002). *Le développement local : comment stimuler l'économie des régions en difficulté*, Québec, Presses de l'Université Laval. Retrieved from https://oraprdnt.uqtr.quebec.ca/pls/public/docs/GSC68/F1879174736_Article_pour_Colombie.pdf (accessed on June 21, 2019).

Lévesque, B. (2011). « La reconnaissance de l'économie sociale au Québec : un long processus qui n'arrive à maturité qu'au tournant du XXIe siècle », In Bouchard, M. J. (dir.), *L'économie sociale, vecteur d'innovation. L'expérience du Québec*, Collection Innovation sociale, Québec : Presses de l'Université du Québec, p. 21-62.

Lévesque, B. et M. Petitclerc (2008). « L'économie sociale au Québec à travers les crises structurelles et les grandes transformations (1850-2008) », *Économie et Solidarités*, vol. 39, no 2, p. 14-37.

Lord, D. (2005). « Chaire Desjardins de coopération et de développement du milieu – Vers un nouveau modèle de partenariat », *Le Devoir*, 29 octobre. Retrieved from <https://www.ledevoir.com/societe/education/93740/chaire-desjardins-de-cooperation-et-de-developpement-du-milieu-vers-un-nouveau-modele-de-partenariat>, (accessed on June 27, 2019).

Miner, K. et C.-A. Guillothe (2014). *Pertinence et impact de l'éducation à l'entreprise coopérative. Améliorer la performance coopérative par l'enseignement du modèle coopératif*, Saint Mary's University et IRECUS. Retrieved from http://irecus.recherche.usherbrooke.ca/wp-content/uploads/2017/02/2014-IRECUS-Pertinence_impact_education_coop.pdf, (accessed on June 27, 2019).

Peloille, G. (2000). « Pour soutenir la recherche fondamentale et appliquée, ainsi que la recherche-action partout dans le monde. Création du Centre d'excellence en gestion du développement local à l'Université de Sherbrooke », *Communiqué*, Université de Sherbrooke. Retrieved from <https://www.usherbrooke.ca/relations-medias/communiques/archives/2000/decembre/communiques-detail/c/3325/>, (accessed on June 27, 2019).

Pichette, C. (1970). « La Chaire de coopération de l'Université de Sherbrooke », *Le mouvement coopératif du Québec et l'éducation des adultes*, Les Cahiers de l'Institut Canadien d'Éducation des Adultes, Collection : Forces Vives, no 8-9.

Prévost, P. (2019). Interview, October 22, 2019.

Rousseau, Y. (1996). « Du projet de reconquête économique à l'idée de management : un bilan des études consacrées au Mouvement Desjardins », *Histoire sociale / Social History*, vol. 29, no 57, p. 97-132.

Ruano-Borbalan, J.C. (2004). « La construction de l'identité », *Identités : L'individu, le groupe, la société*, p.1 à 10.

St-Martin, N. (1999). « Grâce à la chaire McConnell. Le développement local à notre porte », *Communiqué*, Université de Sherbrooke. Retrieved from <https://www.usherbrooke.ca/relations-medias/communiques/archives/1999/juillet/communiques-detail/c/3400/>, (accessed on June 27, 2019).

Université de Sherbrooke (2010). « Des outils de gestion adaptés aux coopératives. Nouvelle Chaire en gestion et gouvernance des coopératives et des mutuelles », *Relations médias*. Retrieved from <https://www.usherbrooke.ca/relations-medias/communiques/communiques-details/c/12369/>, (accessed on June 27, 2019).

Université de Sherbrooke (1996). *Politique sur la reconnaissance des centres et des instituts de recherche*, Politique 2500-013. Retrieved from <https://www.usherbrooke.ca/a-propos/fileadmin/sites/a-propos/documents/direction/politiques/2500-013.pdf> (accessed on June 28, 2019).

Université de Sherbrooke (s.d.). « Moments importants », *École de gestion*. Retrieved from <https://www.usherbrooke.ca/ecole-gestion/ecole-gestion/moments-importants/> (accessed on June 28, 2019).

Vaillancourt, Y. (2008). « L'économie sociale au Québec et au Canada : configurations historiques et enjeux actuels », *Les Cahiers du CRISES*, Collection Études théoriques - no ET0805, 77 p.

Notes

¹ "Founded in 1939, at the instigation and under the aegis of the Faculty of Social Sciences of Université Laval, the Conseil de la Coopération brought together, at its inception, some leaders of the main types of cooperatives in existence at the time, as well as representatives of certain institutions whose programs included teaching or promoting cooperation. These men had been brought together because they felt that an overall effort was needed to overcome two major obstacles to the development of cooperatism: the lack of unity and precision in terms of doctrine, and the lack of coordination in terms of action." (Daneau, 1970)

² The holding of two referendums on Quebec sovereignty needs to be noted. The nationalist movement undoubtedly influenced Quebec society and politics, but our research does not allow us to conclude that there was a direct influence on the cooperative movement. That said, this period made it possible to question the status quo and develop different and innovative social projects. In this way, the cooperative movement was prompted to question itself about the social project it was carrying out.

The University of Winnipeg: The Business Chair in Co-operative Enterprises

Simon Berge, Associate Professor, University of Winnipeg
Darryl Reed, Professor of Business & Society, York University

Abstract: This article examines the efforts by actors in Manitoba to establish a Chair on Co-operatives at two universities in Manitoba. These efforts, which were one small part of the broader agenda of the 2009 Manitoba Co-operative Community Vision and Strategy, brought together cooperative, government and community stakeholders. The article begins with an overview of the 2019 Vision and Strategy document. It then examines the rationale for establishing a Chair at a university. This is followed by the examination of two attempts at establishing a Chair, the first at the University of Manitoba and the second at the University of Winnipeg. An analysis is offered of the choice of these locations, the mixed results of the programs and the various factors that contributed to these mixed results.

Simon Berge is an Associate Professor at the University of Winnipeg in the Business and Administration Department. The focus of his research is on social enterprises, co-operatives and leadership.

Darryl Reed is Professor of Business and Society at York University. His research interests include co-operatives, fair trade movements, business and economic ethics, and social entrepreneurship.

Keywords: co-operatives, endowed chairs, co-operative education, community vision and strategy, stakeholder engagement

Introduction

This article examines the efforts by actors in Manitoba to establish a Chair on Co-operatives at two universities in Manitoba. These efforts, which were one small part of the broader agenda of the 2009 Manitoba Co-operative Community Vision and Strategy, brought together cooperative, government and community stakeholders. The article begins with an overview of the 2019 Vision and Strategy document. It then examines the rationale for establishing a Chair at a university. This is followed by the examination of two attempts at establishing a Chair, the first at the University of Manitoba and the second at the University of Winnipeg. An analysis is offered of the choice of these locations, the mixed results of the programs and the various factors that contributed to these mixed results.

Context – The 2009 Manitoba Co-operative Community Vision and Strategy

In 2009, in an innovative move, the Manitoba Co-operative Association (MCA) partnered with Le Conseil de Développement Économique des Municipalités Bilingues du Manitoba (CDEM) and the Manitoba Provincial Government on a Manitoba Co-operative Community Vision and Strategy (Vision and Strategy) for the Province. The vision was summarized as, “A growing and thriving co-operative community providing a strong leadership role in the social and economic development of Manitoba” (MCA, 2013).

At the time, the co-op sector in Manitoba comprised more than 410 cooperatives, credit unions and caisses populaires in Manitoba, with membership of over 800,000 and assets approaching \$10 billion. In addition, seven of Canada’s top fifty non-financial cooperatives were based in Manitoba. These strong economic indicators for the co-op sector in Manitoba provided the impetus for MCA to engage with CDEM and the Manitoba Provincial Government to promote further co-operative development in the province through a concerted strategy (One World Inc., 2008).

To prepare for the development of the Vision and Strategy, Communications Services Manitoba, a department of the Provincial Government, engaged PRA Inc. in 2009. PRA Inc. was mandated to conduct a survey of co-operatives and credit unions/caisse populaires in Manitoba. The objectives of this research were: (1) to gather information

about co-operatives from board members, and; (2) to understand the business practices of co-operatives in the province (PRA Inc., 2009).

The conclusions from the survey indicated that a majority of Manitoba co-operatives were considered small based on annual earnings. It was found that 41% or 98 of the 240 respondent organizations maintained a gross income of less than \$100,000 per annum. These smaller co-operatives appeared to have less developed governance structures and limited training and development of their board members. In addition, the survey found that due to the smaller membership numbers there were difficulties enticing members to take up a position on the board. Moreover, upon assuming a seat on the board, there was little training and development for board members. The inability to attract new board members and the lack of training was seen as a hindrance to further economic growth in the Manitoba co-operative sector (PRA Inc., 2009).

The survey also indicated that co-operatives were not as visible as they could be across the province. Co-operatives were not seen as a proven model of economic and social development. The lack of awareness and the perception of being an unproven business model appeared to hinder co-operative growth. It was believed that as a result of the lack of awareness of the co-operative model there was a lack of youth engagement and leadership development. The low profile of co-operatives in post-secondary education and limited knowledge of co-operatives within the general population was seen as a significant barrier to growth (One World Inc., 2008).

On the basis of the survey and the committee's reflections, the Vision and Strategy document elaborated its goal as being "to stimulate, broaden and sustain the development of a socially and economically successful Manitoba co-operative community," the results of which would provide the following substantive benefits:

- *Increases in the number and types of cooperatives, in the number of cooperative jobs created and in the total assets of cooperatives will help strengthen the province's economy.*
- *More integrated approaches to financing and skills development will make the cooperative community more self-sufficient and better able to meet challenges and pursue new opportunities.*
- *Cooperatives will have a greater positive social and economic impact in their communities (One World Inc. 2008, p. 4).*

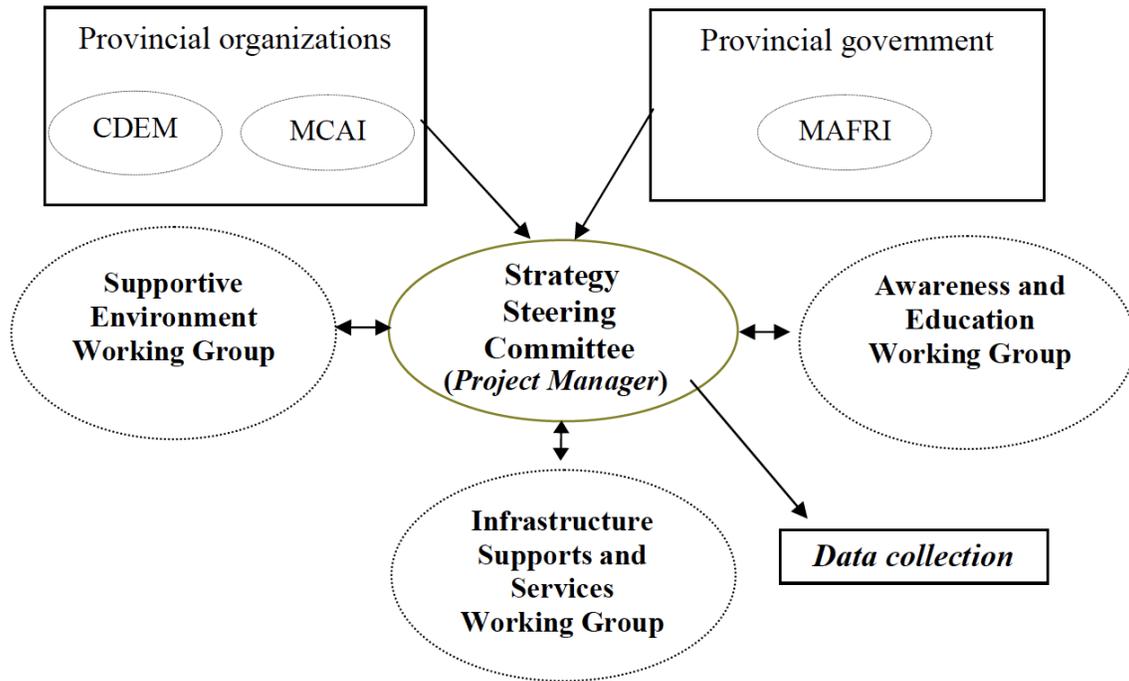
To indicate how the goal of developing a successful cooperative community was to be achieved, the document elaborated three strategic objectives:

1. *To create a more supportive environment for the establishment and on-going operation of co-operatives;*
2. *To foster better awareness and understanding of the values and principles of co-operatives;*
3. *To create a more supportive environment for the establishment and on-going operation of co-operatives (One World Inc., 2008, p.4).*

For each of these objectives, specific features or indicators were distinguished along with "enabling activities" which could contribute to their implementation.

To implement the strategy, three organizations were to take the lead – MCA, CDEM and Manitoba Agriculture, Food and Rural Initiatives (MAFRI) – by forming a provincial "Cooperatives Partnership Table." This latter group was tasked with meeting regularly with sector and government stakeholders as well as serving as a Steering Committee for the implementation of the Plan. A full-time manager was hired to support the Steering Committee and members of the co-operative sector would be invited to participate in three working groups which corresponded to the three strategic objectives: (a) the Supportive Environment Working Group; (b) the Awareness and Education Working Group, and; (c) the Infrastructure Supports and Services Working Group (see Figure 1, below). The Working Groups, in co-ordination with the Steering Committee were responsible for "developing and implementing action plans and securing commitments from various groups and organizations for the three areas of strategic priority" (One World Inc 2008, p.12).

Figure 1: Organizational Framework of the 2009 Manitoba Co-operative Community Vision and Strategy Program



The Strategy and Vision program was projected over a ten-year time span. During the first five years the primary goal was to “put in place the major components of a sustainable environment and a complete set of supports and services for cooperatives,” while the second five years would focus “on consolidating these basic elements and working on growth targets for Manitoba’s cooperative community.” While objectives and targets were to be subject to ongoing reviews, a formal mid-term evaluation was scheduled for 2013 (One World Inc 2008, p.15).

Establishing a Chair on Co-operatives

The second strategic objective of the Vision and Strategy document, Awareness and Education, listed four sub-objectives:

- *General Awareness and Understanding*
- *Youth Engagement and Leadership Renewal*
- *Education of the Co-operative Community*
- *The Co-operative Model in Institutes of Higher Learning* (One World Inc. 2008, p.8).

Under the fourth sub-objective the document indicates that institutions of Higher Learning have “a key role to play in the preparation of tomorrow’s cooperative managers and entrepreneurs, and in research activities that help advance the understanding and application of cooperatives as enterprises that promote social as well as economic values.” For this to happen, it is important that the knowledge of co-operatives is incorporated into various professional programs (e.g., law, accounting) (One World Inc. 2008, p.8). To help ensure that institutions of Higher Learning play the role that the document envisions, four specific facilitating activities are indicated:

- *review, broaden and enhance post-secondary education and research programs on cooperatives;*
- *create a Chair on Cooperatives at a provincial business school;*
- *establish scholarships for students wanting to specialize in the study of Cooperatives;*

- *support conferences and research symposia on cooperatives* (One World Inc. 2008, p.9).

The Chair on Co-operatives was viewed as a potential means to include the study and research of co-operatives within an institute of higher learning. The Chair was also seen as a means to expand the awareness of the Manitoba co-op sector to the rest of Canada through research, scholarships, internships and essay awards. In addition, it was anticipated that the Chair would be able to conduct outreach internationally through public lectures, seminars, and research (Manitoba Co-operative Association, 2013)

In suggesting the creation of a Chair on Cooperatives to help promote the sector, the Vision and Strategy document was following what had become a common practice among business and professional organizations. There is a long tradition at universities of establishing Chairs in particular fields of study, such as art, literature, the natural sciences, etc. Historically, Chairs were typically funded by an endowment from wealthy benefactors, but more recently there has been a move towards individual businesses (and their former top executives), as well as business and professional associations establishing Chairs in a field of study in which they are interested and/or involved. In recent years, with the decline in government funding, universities have become much more active in seeking out patrons to fund Chairs. Professional schools in particular are well placed to seek out individuals and organizations to endow Chairs, as a Chair in their faculties can provide tangible benefits for businesses and professions. These might include training and education of future employees, a leg up on recruiting new employees, research and even reputational advantages. Government granting agencies in many countries, including Canada, have also started to fund Chairs in recent decades.¹

An endowed Chair at a University typically funds the work of an individual academic. At universities, this work consists of research, teaching and service obligations. The latter might consist of administrative duties (serving in administrative positions, working on committees, etc.), community engagement or other activities that the university might deem appropriate. Depending on the terms of the endowment, the workload of the holder of the Chair may be weighted more to research or teaching. Most Chairs tend to be weighted towards research activity, but virtually all Chairs require the holder to engage in teaching, research and some form of service. This is in line with standard responsibilities of the professoriate, the processes for their evaluation for tenure and promotion, and most collective agreements. The specific research and teaching requirements for a Chair are typically laid out in a contract.

While universities actively seek out donors to fund Chairs, conditions are placed upon agreements to ensure that the autonomy of the university and its academic staff are respected and that the position and its responsibilities align with collective agreements and other legal obligations of the university. Specifically, the university must ensure that it retains control over its curriculum and that researchers retain autonomy in conducting and disseminating their research.²

The Agribusiness Chair in Cooperatives and Marketing (University of Manitoba)

The prominent role that co-operatives have played in Manitoba over the years, especially in agriculture, guided the decision to locate the Chair on Co-operatives program at the University of Manitoba. The oldest and largest university in the province, historically this institution had strong links to co-operatives and the agricultural sector, especially through its Department of Agribusiness and Agricultural Economics in the Faculty of Agricultural and Food Science. Given these relationships, it was determined that this department would be a more appropriate location for the new Chair than the university's Asper School of Business. The agribusiness department, it was assumed, could provide ready access to students who would have an interest in co-operatives, as they would likely be interacting with co-operatives on a regular basis in their future careers (Key Informant #2, 2015).

The objectives laid out for the Agribusiness Chair in Cooperatives and Marketing were:

- (1) to develop course material with appropriate emphasis on co-operatives and marketing for use in marketing, policy and business courses at the University and elsewhere;*
- (2) to undertake and encourage research on and to further the understanding of co-operatives and marketing;*

- (3) to develop outreach activities which assist co-operatives and marketing agencies in such areas as Governance, Leadership and Management, Finance, Marketing, and Technological Change, and;
- (4) to develop networks with colleagues at other universities and co-operative institutions (University of Manitoba, 2016).

When the Chair was installed in the agribusiness department, it was envisaged that students within the department (and the faculty) would be the main audience of the program and the curriculum was designed accordingly. While limiting the focus of the Chair to a single business sector seemed logical given the prominent role of co-operatives in agriculture in Manitoba, in practice it turned out to be detrimental to student enrolment. There were two apparent reasons for this. First, students may not have had any interest in the specific courses on offer given that agricultural students already worked with co-operatives and/or a perception that these courses were not relevant for their professional careers. Second, and somewhat ironically perhaps for an economics department, there were no built-in incentives for students to take the courses, insofar as they were not incorporated into program requirements in the department or faculty (Key Informant #2, 2015).

Interestingly, however, there was an audience for the courses outside of the Faculty of Agricultural and Food Science. This came from students in Asper School of Business. The primary factor driving these students to the co-op courses was the requirement that students enrol in an alternative business course offered outside the Asper School (Asper School of Business, 2016; Key Informant #2, 2015). Despite demand from business students in Asper, however, the agribusiness department had no interest in continuing these classes if their students were not enrolling in them. As a result, they were eventually dropped (Key Informant #1, 2015; Key Informant #2, 2015).

The lack of interest from students in the Department of Agribusiness and Agricultural Economics in classes on co-operatives and the Department's decision to stop offering the courses forced the Working Group and the Steering Committee to reflect on a new path forward. One obvious lesson seemed to be that a business school might be a better site for a Chair on cooperatives as it could attract a much broader audience, extending across a range of business sectors.

The Provincial Minister responsible for co-operative development at the time, Kerri Irvin-Ross, Minister of Housing and Community Development, stated that, "Co-ops provide a wide range of important products and services that help build communities by creating jobs" (Poulin, 2012). This statement on the role that co-operatives play within the province echoed the logic of moving the Chair program to a business school (with a broader focus than agribusiness). Co-operatives play a role in housing, food retail, petrochemical and many other sectors within the Manitoba economy, including newly emerging sectors (Key Informant #4, 2015).

In attempting to understand the failure to establish a successful program at the University of Manitoba, several factors seem to come into play. First, as noted above, the Department (and Faculty) did not place appropriate incentives for students to enrol in courses. Second, the wrong target audience was identified. This may have been due in part to a failure to consult. While faculty and administrators were involved in the decision on where to locate the Chair, it is not clear that there was any consultation with students in the program. A more fundamental problem, however, may have been that in looking to the Agribusiness Department, the Steering Committee (and the university) was looking more to the history of co-operatives in Manitoba, rather than to its future and the possibilities in new emerging business sectors (in service, technology, etc.). While the Vision and Strategy document spoke about the need to increase the number and types of co-operatives in Manitoba, this was not reflected in the location of the Chair.

The Business Chair in Co-operative Enterprises (University of Winnipeg)

A new Chair to be housed in the Business and Administration Department at the University of Winnipeg was announced in 2012. Named the Chair in Co-operative Enterprises³, it was aimed at strengthening the co-operative movement by building awareness of the business model. The basic responsibilities of the new Chair mirrored those of the previous Chair at the University of Manitoba, including teaching, research and service activities oriented towards outreach (to the co-op sector in Manitoba and to other universities and co-op institutions). The two key differences were a change in emphasis in teaching and targeting a broader range of students.

The new Chair was developed through a collaborative partnership involving the Manitoba Government, the co-operative and community development sectors and the University of Winnipeg, which raised a total of \$625,000 for the program. Funding for the position came from the Province of Manitoba (\$250,000), Federated Co-operatives Limited (\$100,000), The Co-operators Group (\$100,000), Credit Union Central of Manitoba Limited (\$100,000), Assiniboine Credit Union Limited (\$25,000), Arctic Cooperatives Limited (\$25,000) and Red River Cooperative (\$25,000) (Poulin, 2012).

In a pro-active move to address issues of stakeholder inclusion, those involved in the Business Chair of Co-operative Enterprises at the University of Winnipeg developed an Advisory Committee to integrate stakeholders in the ongoing activities of the program. The Advisory Committee was comprised of funders, government officials, community development organizations, and advocacy agency officials. The Advisory Committee was meant to guide the Chair program to meet the needs of the sector and the University. Also sitting on the committee was the Dean of the Faculty of Business and Economics. The role of the Dean on the Advisory Committee was two-fold: (1) maintain stakeholder relations on behalf of the University, and (2) protect the academic interests of the institution (including the interests of the holder of the Chair) (Key Informant #1, 2015; Key Informant #4, 2015).

Teaching

The selection of the University of Winnipeg as the new home for the Chair program was successful in facilitating engagement with a broader student body. By placing the Chair program within a Business and Administration Department, the program could build awareness of co-operatives amongst business students interested in a wider range of business disciplines and sectors than was possible than in the previous location in an agribusiness program. This interest was reflected in course offerings and enrolments (see Table 1, below), one very tangible measure for the success of the program.⁴

Table 1: Enrolment, Courses and Scholarships

	2014-15	2015-16	2016-17	2017-18
Enrolment ⁵	36	48	162	106
Courses offered	1	1	5	4
Scholarships	n/a	3	3	3

The curricular component of the Chair generally seemed to be well received by the various stakeholder groups. The university and the department were happy because they had a unique content that was of interest to students, the courses were filling and the program was generating income. The co-op sector was also pleased with the course offerings as the program seemed to be effectively contributing to their primary goal of building greater awareness of the co-operative sector and model among youth. The situation with respect to the province was a bit more complicated.

The establishment of the new Chair was originally agreed upon with a New Democratic government, which was on board with the primary objective of the Chair as increasing awareness of the co-operative sector and model. With the election of a Conservative government in 2015, the province’s understanding of the role of the Chair changed. This was reflected in their decision to move co-operative responsibilities out of Housing and Community Development to the Ministry of Growth, Enterprise and Trade (GET). With this move a stronger focus on economic development was taken up and the need to supplement awareness of co-operatives through post-secondary education was deemed unnecessary.⁶ Government’s expectations for the Chair program changed from building awareness to increasing the economic activity of the co-operative sector through the development of highly qualified personnel (HQP). The education of new HQP in the co-operative sector could help improve the efficiency and profitability of the entire co-operative sector working in Manitoba, which was responsible for \$1.7 billion in value-added GDP, or 3.25% of the total provincial economy, a significant portion of the province’s overall economic activity

(Duguid, Karaphillis, & Lake, 2010). The government's focus on capacity building fit well with the university's interests in increasing enrolment through the program as a means of generating revenue. Awareness of the sector was not the primary focus of the new Conservative Government, but the offering of co-operative courses aligned with their strategy of creating jobs within the co-operative sector through development of HQP (Key Informant #5, 2015).

Community Outreach and Service

The Chair program had other components associated with it which can be categorized from the co-operative sector's perspective as community outreach and networking with other (co-operative and academic) institutions. For its part, the University would understand these as forms of service, which could potentially be taken into consideration in annual performance evaluations and in the tenure and promotion process. One important area which might be considered a form of community outreach involves internship programs, a form of experiential education. Such programs are ubiquitous in business schools and other professional programs, and increasingly popular in other fields as well. Such programs may be beneficial for businesses in a variety of ways (an inexpensive source of labour, an aide in recruiting, etc.) and are prized by students as a means to get experience in their field and to generate professional contacts. Thus, it was logical that the Vision and Strategy document incorporated internship programs, as a way to both introduce students to the sector and provide co-operative business with the same advantages that conventional business receives through such programs.

One problem which arose with the internship programs (and other outreach activities more generally) is that expectations were not clearly delineated and, as a result, it was not evident what constituted success. The lack of measures of success and an internal infrastructure meant the Chair faced significant challenges developing and implementing such a program to meet the needs of all the stakeholders involved.

As the University of Winnipeg's Department of Business and Administration is predominately an undergraduate level department one of the primary stakeholders were undergraduate students. To involve these stakeholders, two conferences focused on youth engagement were held at the University. The first conference was held in 2015 and invited local high school students that had developed an art co-operative. The high school students were brought to campus to educate undergraduate business students on what it takes to develop a co-operative. The second conference in 2016 sought to engage young co-op entrepreneurs from Winnipeg to speak to undergraduate students on the opportunities and challenges of developing a co-operative in Winnipeg. Both conferences saw over 50 students attend with active engagement in the topic of the conference.

Research

As noted above, the proposal for a Chair on Co-operatives was raised under the second Strategic Objective of fostering awareness and understanding of co-operatives. While one of the enabling activities entailed reviewing, broadening and enhancing post-secondary education and research programs on co-operatives, the primary emphasis of this objective seemed to be much more focused on disseminating knowledge about co-operatives than actually generating new knowledge. That is, much greater weight was placed on education than research. The lack of interest in research is also evident in the discussion of the two other Strategic Objectives of the program and their working groups (see Figure 1). The heavy prioritization of education over research was confirmed through interviews with actors involved in government, the co-operative sector and other stakeholder groups. In 19 out of the 26 interviews conducted key informants indicated that they had either little or no interest in research.

This relative lack of interest in research sits in opposition to the basic self-understanding of the university and its mission. As the apex body of higher education the university sees itself not only as disseminator of knowledge (which it undertakes through a variety of forms of pedagogy and educational programs), but as one of, if not the most, important producers of knowledge for society, both applied/practical and theoretical (Mainardes et al., 2012). The importance of research for the university is reflected in the evaluation of the professoriate which typically includes research indicators both for annual performance evaluations and the tenure and promotion review process. For their part professors in research streams, which is the vast majority of the full-time professors, are strongly oriented towards research, both out of personal and professional interest. The Chair program enacted research projects to fulfil the professorial mandate to produce new knowledge and engage with students at the Master's and Doctoral

levels. Two Master's students worked with the Chair and Arctic Co-operatives Limited to study co-operatives in Canada's Far North, while a Doctoral student studied the rural entrepreneurial ecosystem to understand the drivers of co-operative development.

Tensions

Due to differing (implicit and explicit) interests and expectations of the various stakeholder groups involved in the establishment and oversight of the Chair (the cooperative sector, the government, the university and community stakeholders), tensions inevitably arose with regard to the functioning of the Chair. These tensions of course, were most acutely, although not exclusively, felt by the academics who were the holders of the Chair. There were two broad types of tension.

The first relates to the time that the Chair should dedicate to different activities. For universities, there is a relatively well-established formula for how (research-stream) academics allocate their time between research, teaching and service obligations, which is usually laid out in a collective agreement between the university and the faculty association. Typically, it is understood that research and teaching take priority, requiring about forty percent each of a professor's time, while service obligations (committee memberships, community engagement, etc.) should not take more than twenty percent of a professor's time. This formula may change for academics who take on significant administrative positions (who receive "teaching release" and are not expected to meet the same research standards) or have large research grants and/or a research chair (who also receive teaching release, but for whom the expectations for research outputs are generally higher).

While this sense of how academics should spend their time is common in universities, outside actors do not always understand this. Thus, when organizations have an agreement with a university, they will tend to place demands on the institution and the person most associated with the agreement (i.e., the holder of the Chair) that reflect their organization's priorities. Their demands, however, (e.g., for education, outreach) may come into conflict with the priorities of the institutions (e.g., for research) as well as the responsibilities (and career aspirations) of their employees (e.g., the holder of the Chair).⁷

The second form of tension relates to the autonomy of academics with respect to their research, teaching and service obligations. Historically it has been argued that academics need to have academic freedom in the classroom and in conducting their research to ensure that universities remain critical in their approach to the dissemination and generation of knowledge. The question is whether and how an agreement with an outside organization to establish a Chair impinges on this freedom. It is generally understood that while the establishment of a Chair can designate an area in which research and teaching are to be done, the donors are not to be involved in the particular content of courses to be taught. The situation arguably becomes more involved with a Chair like the Business Chair of Cooperative Enterprises which deals with a particular business sector, and which should have significant knowledge about the sector. It might reasonably be asked whether the university and the holder of the Chair have some obligation to at least consult with the sector (and other stakeholders) about the nature of teaching, research and outreach to be conducted, as they should have insights into how the performance and contributions of the sector can be enhanced. Tension may arise, however, when the holder of the Chair (or a university administrator) feels that their professional career is linked to continued funding for the Chair and this places pressure on them to allow the donors to have inordinate influence over the content of teaching, research and even outreach agendas.

Mediating these two types of tensions was not always easy, especially the first one, which was more acute. The basic reality that had to be confronted was that the Chair had limited resources and the sector and the university had different expectations of program outcomes. At the institutional level, the university had to insist on the formalized expectations outlined by the funders in the form of contracts with concrete deliverables taking precedence over the informal expectations of other stakeholders, especially non-funding members (Manitoba Provincial Government, 2013; University of Winnipeg, 2012). Here the Dean of the Faculty and the Chair of the Department played key roles in trying to explain the university's situation and control what were seen to be unrealistic expectations on the part of (some) sector and community stakeholders.

Conclusion

The efforts by co-operative actors in Manitoba to engage with institutions of higher education represent a continuation of a long tradition in the sector. This tradition has included the establishment of Co-operative Colleges (and now Universities) in Canada (at the University of Saskatchewan), the UK (Manchester) and across Africa and Asia. It has also worked through extension programs on numerous universities in North American and around the world (the best known Canadian example being the extension program at St. Francis Xavier University in Antigonish, Nova Scotia). These initiatives, all of which primarily focused on the agricultural sector, have had a huge impact on the growth and development of co-operatives sector around the world.

In an effort to replay the success of the past, the Manitoba co-op sector and partners sought to reintroduce education on the co-operative model with a similar agricultural focus. The sector and the university, however, found the key to success is to ensure that all expectations of stakeholders involved in any program are formally outlined. Clear operational details including measurable outcomes are required for the program to follow a path of success that all stakeholders can share. It is also important that actors understand the mission, capacities and limitations of the organizations that they are working with. The mixed results of the Chair program are, in part, a result of the dual role of post-secondary institutions as knowledge disseminators or knowledge creators.

References

- Adeler, M. (2009). *Enabling Policy Environments for Co-operative Development: A Comparative Experience*. Retrieved from Saskatoon, SK: <http://seedwinnipeg.ca/files/EnablingPolicyEnvironments.pdf>
- Asper School of Business. (2016). Bachelor of Commerce (Honours) Program Guide for Students Admitted to the Asper School of Business. In. Manitoba, Canada: University of Manitoba.
- Canadian Government. (2015). Method of Allocating Chairs. Retrieved from <http://www.chairs-chaire.gc.ca/program-programme/allocation-attribution-eng.aspx>
- Duguid, F., Karaphillis, G., & Lake, A. (2010). *Economic Impact of the Co-operative Sector in Manitoba (2010)*. Retrieved from Manitoba, Canada: <http://www.manitoba.coop/uploads/Resources/Manitoba%20Co-op%20Impact%20Study%20-%20FINAL.pdf>
- Engwall, L. (2007). Universities, the State and the Market: Changing Patterns of University Governance in Sweden and Beyond. *HIGHER EDUCATION MANAGEMENT AND POLICY*, 19(3), 87-104.
- Faugier, J., & Sargeant, M. (1997). Sampling hard to reach populations. *Journal of Advanced Nursing*, 26(4), 790-797.
- Horowitz Gassol, J. (2007). The effect of university culture and stakeholders' perceptions on university-business linking activities. *The Journal of Technology Transfer*, 32(5), 489-507.
- Key Informant #1. (2015) *Vision and Strategy Interviews/Interviewer: S. Berge*.
- Key Informant #2. (2015) *Vision and Strategy Interviews/Interviewer: S. Berge*.
- Key Informant #3. (2015) *Vision and Strategy Interviews/Interviewer: S. Berge*.
- Key Informant #4. (2015) *Vision and Strategy Interviews/Interviewer: S. Berge*.
- Key Informant #5. (2015) *Vision and Strategy Interviews/Interviewer: S. Berge*.
- Key Informant #6. (2016) *Vision and Strategy Interviews/Interviewer: S. Berge*.

- Lee, D. (2016). Brain Pallister's PCs win majority government in Manitoba. *Canadian Broadcasting Corporation (CBC)*. Retrieved from <https://www.cbc.ca/news/canada/manitoba/manitoba-election-results-1.3543735>
- Lewis-Beck, M., Bryman, A., Liao, T., & Sage Publications. (2004). *The sage encyclopedia of social science research methods*. Thousand Oaks, Calif.: Sage
- .Mainardes, E. W., Raposo, M., & Alves, H. (2012). Universities Need a Market Orientation to Attract Non-Traditional Stakeholders as New Financial Sources. *Public Organiz Rev Public Organization Review : A Global Journal*, 14, 159-171.
- Manitoba Co-operative Association. (2013). Co-op Education. Retrieved from <http://manitoba.coop/Page.aspx?MainPageID=about-co-ops&MenuPageID=test-page>
- Manitoba Provincial Government. (2013). *Conditional Funding Agreement*. Winnipeg, Manitoba.
- MCA. (2013). Co-op Vision and Strategy. Retrieved from <http://manitoba.coop/Page.aspx?MainPageID=co-op-community&MenuPageID=strategy>
- NSERC. (2016). Industrial Research Chair Grants. Retrieved from http://www.nserc-crsng.gc.ca/Professors-Professeurs/CFS-PCP/IRC-PCI_eng.asp
- One World Inc. (2008). *Leading and making a difference in Manitoba the co-op way: A strategy for developing and maintaining Manitoba's cooperative community*. Retrieved from <http://manitoba.coop/Uploads/File/Co-op%20Strategy%20Paper.pdf>
- Poulin, D. (2012). Manitoba's First "Chair in Co-Operative Enterprises". Retrieved from <http://news-centre.uwinnipeg.ca/all-posts/manitobas-first-chair-in-co-operative-enterprises-2/>
- PRA Inc. (2009). *Survey of Manitoba Co-operatives*. Retrieved from Winnipeg, Manitoba: <http://www.manitoba.coop/Uploads/File/survey%20of%20co-ops.pdf>
- University of Guelph. (2010). Loblaw, UofG Announce Chair in Sustainable Food Production. Retrieved from http://www.uoguelph.ca/news/2010/04/loblaw_u_of_g_a.html
- University of Manitoba. (2016). Agribusiness Chair in Cooperatives and Marketing. Retrieved from <http://umanitoba.ca/faculties/afs/dept/agribusiness/courses/1048.html>
- University of Winnipeg. (2012). *Gift Agreement: Support the Establishment of The University of Winnipeg's Chair in Co-operative Enterprises within the Faculty of Business and Economics*.
- University of Winnipeg Faculty Association. (2012). UWFA Collective Agreement, Regular Academic Staff (RAS) 2012 - 2015. In. Winnipeg, MB: University of Winnipeg.

Notes

¹ Research chairs in Canada are funded through national research councils, which establish procedures for allocating these funds. The granting agencies and the university enter into a codified agreement on the disbursement of funds for specific awards. Funds are provided once a candidate for the Research chair has been chosen through a transparent and competitive selection process. These Research chairs are normally only allowed to be held for two terms or less, which helps to minimize the influence on the academic to cater their work toward the granting agency's needs in order to secure additional funding (Canadian Government, 2015; NSERC, 2016).

² For example, Loblaw Canada provided \$3 million (CND) for the establishment of The Loblaw Companies Limited Chair in Sustainable Food Production at the University of Guelph in Ontario, Canada (University of Guelph, 2010). The \$3 million (CDN) gift allows for the establishment of the chair position as well as the independence of the chair, as the gift is provided upfront to the university. The upfront funding provides a stable base for research and teaching activities by the academic holding the chair position. It is more difficult for a business sponsor or individual to influence the university or academic holding the chair as the funds are already in the hands of the post-secondary institution.

³ The name of the Chair was subsequently changed to the Business Chair of Cooperative Enterprises. The reason for this change was to avoid any confusion between this endowed chair and the administrative positions in the universities, that is, chairs of departments (e.g., the Department of Business and Administration). While the Chair of Co-operative Enterprises was never meant to represent the administration of the university, it was felt that a name change was in order (Key Informant #5, 2015).

⁴ The Visions and Strategy document also indicated scholarships as another facilitating activity, which could also be used as an indicator of the success of the program. The expectation was that co-operatives would provide these scholarships. To the extent that all the scholarships were generated by a single stakeholder on the committee, the program (or the committee on behalf of the program) did not perform particularly strongly in this area.

⁵ Five courses were developed in 2016-17 as the program funding was ending: 1) *Fundamentals of Co-operatives* (2nd year course), 2) *Management of Co-operatives* (3rd year course), 3) *Co-operative Entrepreneurship* (3rd year course), 4) *Co-operative and Credit Union Accounting and Performance Measures* (3rd year course), and 5) *Financing a Co-operative* (4th year course).

⁶ An important result of this change in government focus was that funding for the co-operative program was cut in 2017, one year shy of the program's formal end-date.

⁷ This situation was probably attributable in part to the wide range of organizations involved in creating the Vision and Strategy document. This included not only funding agencies, but also community development groups such as SEED Winnipeg and CCEDNet.

University of Saskatchewan: The Centre for the Study of Co-operatives

Merle Massie, Centre for the Study of Co-operatives, University of Saskatchewan

Abstract: The Centre for the Study of Co-operatives at the University of Saskatchewan was opened in 1984, through financial and in-kind collaboration between the university, the government, and the co-operative sector. A centre-scholar model brought together academics from multiple disciplines, to deliberately build an interdisciplinary approach to co-operative questions. Researchers at the centre valued academic and non-academic knowledge, offering the ability to approach questions with the strength of multiple perspectives. This paper uses historical methodology to trace the centre's deliberate stance and approach to interdisciplinarity, the work undertaken by centre faculty to conceptually wrestle with moving from multi-disciplinary to interdisciplinary research, and the resulting close connection between interdisciplinary studies and co-operative studies.

Merle Massie is a Saskatchewan historian, writer and farmer. She is currently the coordinator of undergraduate research at the University of Saskatchewan. Previously, she has worked on contract for the Centre for the Study of Co-operatives.

Acknowledgements: This paper is based on a number of interviews with present and past staff, faculty and board members who have served the Centre for the Study of Co-operatives at the University of Saskatchewan. Their forthright vision, stories and memories are warmly acknowledged.

Keywords: Co-operative Studies; Interdisciplinarity; multi-disciplinarity, centre-scholar model; institutional history

Introduction

The Centre for the Study of Co-operatives (CSC) opened in June 1984 in the Diefenbaker Building at the University of Saskatchewan in Saskatoon, Saskatchewan, Canada. Its mandate has been to study the co-operative form of enterprise and to disseminate that knowledge through teaching and publications. This chapter offers a behind-the-scenes look at the origins of the CSC as a tripartite agreement and shared contract between the co-operative sector of that province, the University of Saskatchewan, and the provincial government. It then examines how the concept of interdisciplinary studies was actioned in the hallways and into the CSC literature, deliberately developed as its foundational model. CSC's leading-edge practice would consolidate the interdisciplinary focus to create a world-renowned body of co-operative and credit union knowledge. This chapter examines how co-operative studies has been, at the CSC, intimately tied to the concept of interdisciplinarity.

Interdisciplinarity is an evolving and contested concept. One of the arguments for disciplinary studies is that it offers a way to pass information from one generation to the next, nested within a set of explicit and implicit understandings, practices, and norms [Stehr and Weingart, 2000]. With this definition, interdisciplinarity involves and describes the ways and practices in which disciplinary boundaries (explicit and implicit) are deliberately bridged, broken, or blended. Yet the practice of interdisciplinary work can result in that which is much more than the sum of its parts, and sometimes, wholly new. From a university governance perspective, the creation of deliberately interdisciplinary research centres, clusters, or schools has added complexity while rewarding the power and prestige of this new form. In co-operative studies, leading thinker Ian MacPherson regularly argued that co-operatives *required* interdisciplinarity as the only adequate methodological approach to the analysis of complex social structures; both disciplinary or multidisciplinary approaches proved limiting [MacPherson, 2007a]. This chapter is a ground-truth examination of a specific case, to consider the challenges to promoting interdisciplinary practice within a multidisciplinary structure, the importance of cohort and time to developing interdisciplinary practice, and the way in which interdisciplinarity at the CSC moved beyond academic and disciplinary questions to integrate non-academic

Correspondence address: Merle Massie, The Centre for the Study of Co-operatives, University of Saskatchewan, Saskatoon, Saskatchewan, Canada. merle.massie@usask.ca

researchers. It will consider whether the key features of interdisciplinary studies as practiced at the CSC (sustained practice over time; the centre-scholar cohort model; academics and practitioners working together) had an effect on the practice or understanding of interdisciplinary scholarship, either within the larger co-operative community or within the University of Saskatchewan.

Methodology

This chapter is drawn from a larger (to be published) institutional history of the Centre for the Study of Co-operatives. The centre's history was undertaken in two stages by a contract Saskatchewan historian familiar with the CSC (author). The CSC has stayed rooted in place at the University and within the Diefenbaker Center. As a result, there is an institutional archive split between CSC internal files (director's reports, board meetings, internal reviews and initiatives), as well as outward-focused publications, including annual reports, newsletters, and formal CSC publications, which have included bulletins, books, project reports, and other outputs including its website. Its extensive archival and library collection is now held in the University of Saskatchewan Archives and Special Collections. In addition to the institutional documents, the author conducted a total of seventeen semi-structured interviews with contemporary and past faculty, staff, and board members, until interview saturation brought closure. The second stage of the history project involved writing a larger manuscript using a resilience theory methodology (looking at change and continuity within the Centre's history).³¹ From that larger manuscript, this chapter – focusing on the concept of interdisciplinarity – was drawn for the purposes of this publication on co-operatives.

Origin: The Centre-Scholar Model

In 1980, Leo Kristjanson, who was to be a key catalyst in the creation of the Centre for the Study of Co-operatives, became President of the University of Saskatchewan. Born in the swampy, wet farming region near Gimli, Manitoba, Kristjanson earned a PhD studying the economics of rural development, population, and co-operatives in Madison, Wisconsin. Researchers at the time were beginning to understand that issues in rural development were complex and required new ways of thinking. One of the ways to address complexity was through the lens of interdisciplinarity, a concept which grew during the 1950s and surged between 1960 and the mid-1970s [Repko, Szostak, and Buchberger 2016]. Interdisciplinary studies aimed to bridge disciplinary boundaries and bring together multiple perspectives, but in practice, the concept was not yet defined and few had a clear understanding of its potential.

In 1959, Kristjanson came as an economist and researcher to the brand-new Centre for Community Studies at the University of Saskatchewan. A joint Government of Canada/University partnership, the Centre for Community Studies adopted the "centre-scholar" model, to deliberately bring in scholars from varied backgrounds to create a team drawn from a range of academic disciplines: sociology, economics, anthropology, psychology and history. Bringing in diverse scholars with deep disciplinary training is a multidisciplinary method, but its goal was ultimately a form of interdisciplinary thinking, to bring perspectives together to work on conceptual and practical research together, focused as a team around a given topic.

Specializing in community change and development, the Centre for Community Studies produced copious public reports, research, and analysis on community-level issues. It also accepted commissioned work at the request of communities, government departments, and businesses, reinforcing the connection between the university and its community partners. The co-operative sector in Saskatchewan was a regular patron of these services. When this Centre re-formed and relocated to Ottawa in 1966, Leo Kristjanson elected to stay in Saskatoon and moved up the academic ranks as an agricultural economist, teaching classes on co-operatives and entering higher administrative positions. By 1980, he became President of the University of Saskatchewan. Yet, he hadn't forgotten the role and purpose of the centre-scholar model, believing that it held important keys to unlocking new ways to collaboratively search for new perspectives.

The University-Co-operative Task Force

A life-long co-operative member and enthusiast, Kristjanson studied and taught co-operatives and credit unions in his agricultural economics classes. He also knew first-hand the size, power, and spirit of Saskatchewan's co-operative might. Yet he thought something important was missing. Co-operatives and credit unions represented some of the

strongest businesses in Saskatchewan; however, knowledge about co-operatives was dropping, and there was little to no presence in the research or teaching curriculum at the university level, outside of his own courses [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives]. To address this problem, soon after Kristjanson took the reigns as president, he tapped into the provincial and regional co-operative network.

As remains the case today, Saskatchewan in 1980 was a province where connections mattered. A population hovering around one million people meant that in practice, there was a sense of village and community. Kristjanson drew on his co-operative connections to establish a University – Co-operative Task Force to study the connection between co-operatives and universities. He used personal links to bring in leaders from both within and outside the university, from the left-leaning New Democratic Party government, to the leaders of the largest co-operatives, alongside the deans of the colleges on campus. On this task force: George Lee as the head of Agricultural Economics; Doug Cherry, Dean of Arts & Science; Blaine Holmlund, Vice President of Special Projects; Grant Mitchell, Deputy Minister of the Department of Co-operatives and Co-operative Development for the Province of Saskatchewan; Peter Hlushko, Vice President Personnel and Service for The Co-operators and Chair of the Co-operative College of Canada (and who also worked closely with Credit Union Central of Saskatchewan); Vern Leland, President of Federated Co-operatives Limited; Ted Turner, President of the Saskatchewan Wheat Pool; and Ole Turnbull, Executive Director of the Co-operative College of Canada [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives]. It was a who's who of the province's co-operative community, combining decision-makers from the major co-ops and the provincial government, and matching that might with the leaders at the University.

These leaders had excellent mutual working relationships, near friendships, built on trust and mutual respect. They committed quickly and decisively to working together on the project. Ted Turner later recalled, "Often it's the little things that are more influential than the big scope. Those background personal relationships meant so much. We all think it's the big issues that determine something, when often it's the many smaller connections that push you in a certain direction" [Turner interview with author, 2018]. Vern Leland spoke of the same connection: "It seems to me that we had such a good relationship, a group of individuals that really seemed to relate to one another" [Leland interview with author, 2018].

Their goal was simple: raise the profile of co-operatives and credit unions at the university level. "You have to get a needle in, to get things started," Vern Leland explained [2018]. Ted Turner [2018] remembered total commitment to the idea. Students were entering university at an unprecedented rate – co-operatives had to be where the students were. To be taken seriously, to be studied and taught and debated, co-operatives needed to be a player at the university level. "The University of Saskatchewan, for example, must be seen to take its responsibilities toward the cooperative movement seriously in addition to putting its house in order for the effective delivery of instruction and research appropriate to the needs of cooperatives. By the same token, leadership within the cooperative movement must be seen equally to support University cooperative efforts" [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives].

As the Task Force met in 1980 and 1981, fleshing out problems with the current system and putting forth reports, Leo Kristjanson received a fascinating story from University College Cork, in Ireland. There, a steering committee of combined University and co-operative/credit union representatives launched the Bank of Ireland Centre for Co-operative Studies. Reading this two-page magazine article, Leo took pen in hand and went to work, marking significant points. The new Centre at Cork aimed to be/was built:

- In close association with the Co-operative Movement, at home and abroad
- Within a university campus
- On interdisciplinary lines
- With a high level of postgraduate research
- With a high output of educational materials

Combining recruited academic staff and research fellows, the new co-operative research centre would deliberately draw from "relevant faculties" across the campus, including agriculture, law, economics, history and sociology. The Cork structure looked very like the centre-scholar model Kristjanson had worked with while at the Centre for

Community Studies, modified to draw from existing relevant faculties across campus. It is clear that the interdisciplinary model used at University County Cork had a major influence on building the Centre for the Study of Co-operatives at the University of Saskatchewan [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives].

Gerald Shuyler, then director of the Co-operative College of Canada, began to shape the aims and interests of the Task Force into a recognizable (yet still on paper) structure. By September of 1981, he had crafted an outline for a “University of Saskatchewan Co-operative Centre” that coalesced into a brand-new entity within the University [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives]. His draft captured the six supporting organizations represented by Task Force members (the University, the government of Saskatchewan, Saskatchewan Wheat Pool, Credit Union Central Saskatchewan, and Federated Co-operatives Ltd., as well as the Co-operative College of Canada), the objectives of the new entity, its administrative structure with board, academic, and support staff, and an overview of expected financial support, costs, and division of those costs, including a built-in five-year commitment from each of the players. In essence, this document gives the first framework for what would become the Centre for the Study of Co-operatives. Task Force members worked through Schuyler’s outline to negotiate a final agreement [CSC files, RG001.S6.Box12.I.22.22.1980-82, University of Saskatchewan Archives].

The objectives of the new Centre were: to establish a program of studies at the undergraduate and graduate level with classes available to students across campus; undertake off-campus program collaboration with the Co-operative College; undertake research and publication of those results including textbooks and curriculum; and to conduct research concerning the legislation governing co-operatives and credit unions. Governance flowed from a ten-member board: five from the co-operative and government side, and five from the University. It set out provisions for four academic staff (one director and three faculty) from different campus departments and colleges, and three support staff. Finances were split between the provincial government at 40% and the co-operative sector at 60%. The University of Saskatchewan, in the first agreement, carried minimal financial responsibility, mainly relating to accounting oversight, office and classroom space, and money towards building library resources. On March 24th, 1982, the Centre for the Study of Co-operatives was signed into paper existence [CSC files, CSC office, original signed agreement, 1982].

University-Centre Relationships

The origins of the Centre, as a shared agreement hammered out between the University, the provincial government, and the co-operative sector, with each clearly laying out financial and other obligations, seems quite clear. But there is a cover of secrecy over its origins that bears noting, as it had repercussions for the nascent centre as it settled into the university milieu. Other than the selected Deans on the Task Force, few others at the university knew about the negotiations surrounding the creation of the centre – and that mattered. Leo Kristjanson used the powers of his office as President of the University to deliberately bypass and ignore a number of university precedents. The Centre was, it has since been suggested, “illegitimately conceived” [Fairbairn, 2017]. President Kristjanson never went to the University Council or Senate to ask permission or gain approval or assent for pursuing, then signing into legal being, the new Centre.

Why did discussion and approval matter? Wouldn’t the colleges welcome the opportunity to vie for one of the four new incoming academics, whose salaries would be paid out of the new funding and not come from their own departmental budgets? Yes, and no, it turned out. The fact that Kristjanson did not ask permission of the broader faculty set up a culture of animosity within some sectors of the University. It was a blatant expression of a President’s power that did not go through proper channels or explore basic interest in such an idea. A whole Centre devoted to co-operatives and credit unions? Surely there were more important issues to consider. There was even a strain of concern around University research autonomy: if this new Centre was funded from outside the University, who was calling the shots and setting its research priorities and directions? The Centre, created with such celebration from the co-operative community, experienced a much colder reception in some parts of its home university [Fairbairn 2017; Fulton 2017; Hammond Ketilson 2017].

But the secrecy embedded in the origin story carried a positive spin. Those who became part of the CSC could choose to view themselves as ‘maverick’, less bound by convention and path dependency, with a willingness not just to

embrace, but to instigate change. An origin story based on blasting through the walls of the academy, starting something new, and doing so despite opposition, with the support of groups outside (and not beholden to) academia, mattered. Such an origin story gave the nascent centre a heightened sense that what they were doing, and what they were meant to be doing, was different [Fulton 2017; Axworthy 2017].

Building Interdisciplinarity

The pivotal first job: hiring a director of the new centre. The board was delighted to receive an application from one of the most prestigious academics in Canada, whose work crossed history, agriculture, and co-operatives: Ian MacPherson. They didn't hesitate: in a unanimous decision, the board offered Ian, via telex memo, the first directorship. But MacPherson changed his mind and turned it down. Due to family circumstances, he could not accept. With MacPherson's sudden refusal, the hiring process stalled. Although there were a multitude of applicants, many with direct practical experience from the co-operative sector, university credentials were critical and non-negotiable. The incoming director, leading an academic unit embedded within the university, must have a PhD, as well as a stellar research, teaching, and publication record within academia [RG001.S6.Box12.I.22.22.1983-84]. The solution came in early 1984 with the hiring of Chris Axworthy, a law professor from Dalhousie in Halifax. It was, Axworthy would later note, "a significant opportunity" to lead a new, well-funded centre, one that straddled university and the co-operative community, and set its own direction and character [Axworthy, 2017]. With Axworthy's arrival, the Centre for the Study of Co-operatives opened on June 7th, 1984.

Axworthy lost no time. Leo Kristjanson's goal and vision was to create a centre-scholar model that would work like a spider's web: weaving strands from disparate points across campus to create something new and unique. That meant that each of the four centre academics would be hired into home departments and colleges, whether that was in law, commerce, agriculture, arts and science, or education. Kristjanson's vision foreshadowed what Ian MacPherson would later argue: "no single discipline within the academy can adequately comprehend co-operatives." Almost all disciplines had an important perspective [MacPherson, 2007a: 387].

The concept of building an interdisciplinary centre was not particularly embraced within the University of Saskatchewan. In the 1980s, interdisciplinary work was not well understood – and, in some cases, caused snorts of derision and even outright revulsion and contempt. Professors who came to join the Centre for the Study of Co-operatives during the 1980s faced "great suspicion." Was a position within an interdisciplinary centre a real academic job? Was the centre actually a good home for a true academic? Would connection to the centre hinder the academic path? There was a stagnation, even a falling off, of the use of the word 'interdisciplinary' during the 1980s. The concept was "strange and off-putting" for many University of Saskatchewan faculty – a problem which, no doubt, contributed to its uneven acceptance on campus [Fairbairn, 2017].

Nonetheless, scholars came. Lou Hammond Ketilson joined the centre first as a research associate, later as a Centre Fellow when she accepted a position in Commerce. Murray Fulton came to the centre in 1985, joining the department of Agricultural Economics, following Kristjanson's footsteps. The full faculty complement rounded out with Brett Fairbairn, who joined the centre and the department of History in 1986. At that point, energy fully shifted from the CSC board to its faculty, and to its cognate staff. The CSC had accrued unexpected capital, via good investments in the early 1980s with high interest rates, while waiting during the lag time to find a director and officially open. As a result, in addition to faculty, the CSC was built around a core staff component, which included office management, communications leadership, and extra research expertise via associate research positions. While the board retained its management style, approving budgets and providing general direction, they would meet only three times per year. The CSC identity became enmeshed with the Diefenbaker Centre and the faculty and staff who became the 'face' of the CSC [RG001.S6.Box12.I.22.22.General.1985].

While Leo Kristjanson might have envisioned a centre-scholar model, pulling from different departments is, in fact, multidisciplinary, not interdisciplinary. Multidisciplinary simply means making sure that the issue at hand is being studied from multiple viewpoints, such as economics, law, or business. The Centre has produced many such publications, where each faculty member and other invitees contributed chapters, researched and written from their own disciplinary perspective. Trying to find links and points of connection to weave a single story was not always easy; in fact, one faculty member called such multidisciplinary books "a painful experience" [Hammond Ketilson,

2017]. But the process led to the first glimmers of what interdisciplinarity could mean. Chris Axworthy reported to the CSC board in 1987: “Our lively debates have given rise to suggestions for a wide array of joint, interdisciplinary projects to be attacked in the future ... each member of the staff has learned a good deal about their colleagues' disciplines as a result of the close working relationship.” [CSC Director Report, 1987].

The CSC scholars discovered that the act of being interdisciplinary is complex. There is a level of integration, of deliberately choosing to listen to another point of view and looking at something with more than one lens at the same time. Yet the practice of interdisciplinarity was fairly new, and at the time, few descriptions of *how to do it* existed. Chris Axworthy [2017] noted that interdisciplinary work was “Not all that common at the time. We did a lot of that, which was in a sense ground-breaking.” But, he admitted, it was messy, and it did take concerted energy and commitment.

What they needed to do, faculty realized, was teach each other how their disciplines thought and what mattered to each. Starting informally in the late 1980s and continuing formally under the guidance of second CSC director Dan Ish, faculty scholars set out to teach each other about their disciplinary training. Each wrote overviews from their disciplinary perspective on how they would approach a topic, what they would do and what tools they would use. These documents formed the basis for deep discussion, debate and intellectual arguments about the models and their underlying assumptions. “We wanted to be formal about this,” Murray Fulton [2017] noted, “because we were bumping heads as we were having conversations about our research. We needed to understand the depth of our assumptions. That was an exciting time intellectually, we were all learning a tremendous amount. We had to figure out how we could coexist and operate together with other disciplinary perspectives.” It wasn't enough to build a group from different disciplinary backgrounds, throw them together and expect interdisciplinary outcomes. The act of being, or becoming, interdisciplinary required the faculty and staff at the Centre to focus on disciplines, debate and understand differences and how they could work together. Lou Hammond Ketilson [2017] explained, “we started doing seminars for each other, so we could help others to see what each discipline brought to the table. That was a good exercise. That is what built a sense of community within the centre.”

Focusing on building an interdisciplinary cohort with shared goals allowed the Centre to coalesce and grow. In early co-operatives, there was a concept called “associative intelligence” which Ian MacPherson defined as “a special kind of knowing that emerges when people work together effectively.” He went on to argue that associative intelligence involves “dispensing of information, providing training, encouraging reflection, creating knowledge, and facilitating learning” [MacPherson, 2007a: 372-3]. It is, in fact, the *work* that creates associative intelligence, just as the *work* of building bridges between disciplines sets the stage for being or becoming interdisciplinary.

Almost immediately, CSC faculty and staff could see the difference. A call came out from the national co-operative organization to do a study on the role of co-ops in Canada. The Centre, fresh from months of concerted effort to share and integrate disciplinary perspectives and work toward a new interdisciplinarity, bid on the contract, but it was awarded to a private research firm. “To put it bluntly,” Murray Fulton [2017] noted, “we were pissed off.” Centre faculty and staff quickly pulled together what was to become ‘the little green book,’ *Co-operatives and Community Development: Economics in Social Perspective*. Published in 1991, the book was a runaway best-seller, used in classrooms worldwide. Its authors are a who's who of the CSC at the time: Brett Fairbairn, June Bold, Murray Fulton, Lou Hammond Ketilson, and Daniel Ish. June Bold, the CSC communications officer, was an active contributor and listed as second author, suggesting the inclusion of perspectives beyond faculty as interdisciplinarity in action at the CSC.

The book touched a nerve and drove much of the discussion around the role of co-ops at the community level. It was used in classrooms and in community economic development as a resource and strategy support. It was also timely: the International Co-operative Alliance (ICA) was revising its principles to add the 7th principle, concern for community. The green book, while not responsible for the ICA addition, was a factor in the discussion. During the interview process to collect CSC history, faculty remembered this book as a definitive event not for its success, but for its deliberate interdisciplinarity. It showed the way the Centre had moved from its multidisciplinary origins to a new interdisciplinarity – and one step further. The process of sharing, arguing and understanding each others' disciplinary perspectives and norms was deliberately blended with a practitioner focus, using June Bold's expertise

in writing for a non-academic audience and bringing a fresh, non-biased look at the group's interdisciplinary work. The new model of combining faculty and staff created something unique.

It took some time for the board to understand what faculty were doing. Peter MacKinnon, then dean of the college of Law, called the CSC work "cross-disciplinary" while Vern Leland, co-chair of the board, referred to the approach as "multidisciplinary" [Annual Report, 1991-1992]. By 1995, faculty scholars had coached the co-operative board members through a clear understanding of interdisciplinarity, and the annual report lauds the concept: "[The Centre] provides an example of interdisciplinary teaching and research needed to tackle the complex issues in contemporary society...[and] to enhance the future welfare of members and their communities..." [CSC Annual Report, 1995]. Interestingly, the university-based board members clung to the term "cross-disciplinary." Perhaps the larger university community still had reservations about interdisciplinarity as a concept, but those were swept aside by the year 2000. That year, the university commentary in the CSC annual report embraced interdisciplinarity and celebrated the CSC as "one of the most successful interdisciplinary programs on campus." Interdisciplinary teaching, research, and publication had, it seemed, found its voice [CSC Annual Report, 2000-2001].

For some faculty, the pull between disciplinary research expectations of a home department combined with those of the Centre created a dual research program far beyond what strictly disciplinary colleagues were expected to undertake. As has been found in studies of institute or centre-based academics around the world, the tension between disciplinary and multi or inter-disciplinary research centres created a new viewpoint on "individual-level research capacity and how it may be affected by professional linkages and network ties, including but not limited to linkages and ties made by way of affiliation with a university research center" [Ponomariov and Boardman 2010: 614]. For some, such as faculty from business and sociology, the relationship to the centre brought not synergy but competition and an increased workload [Hammond Ketilson 2017; Gertler 2018]. Ian MacPherson noted that "researchers have had to 'make their careers' in traditional disciplines, where the study of co-operatives is rarely acknowledged as important" [2007b: 41], a point which doubly constrained some of the CSC academics. If their co-operative research did not 'count' in their home discipline, they faced a career needing *two* trajectories, one within the home discipline, one at the CSC. While the CSC provided a place where interdisciplinarity was valued, each faculty member was bound by promotion and tenure expectations of home departments and as such, disciplinary-bound publication records remained primary. The interdisciplinary nature of some Centre publications, with multiple authors, caused consternation: evaluators "can't tell what percentage of that work is yours," Hammond Ketilson [2017] noted bluntly. She strongly suggested that the interdisciplinary publishing path, so valued by co-operative and community collaborators, caused individual hardship for some of the faculty, who never achieved full professorship or, chose to leave the University of Saskatchewan to seek opportunities elsewhere [Laycock 2017]. Other faculty, however, found that interdisciplinary thought and learning acted to revitalize and strengthen disciplinary work [Fairbairn and Fulton, 2000].

Because the CSC had developed internal publishing capability via the *Occasional Papers* series as well as books and other publications, much of the co-operative interdisciplinary work was self-published. From an academic perspective, these publications held less merit than those published via peer-reviewed journals. From the co-operative perspective, these publications were the primary output of the CSC scholars. They were accessible to read, could be purchased through the CSC, and dealt specifically with co-operative issues. Some were simply conference proceedings or bibliographies; some were how-to books or membership training; many were histories of co-operatives or co-operative movements; while others were discussion papers or reflections to guide policy decisions or provide CSC commentary on community or public issues.

As a result, the interdisciplinary perspective, built with vigour and determination and published through the CSC, was highly valued within the co-operative community. Co-operatives, by their nature, value diversity and are a reminder that each individual brings strengths to the collective table. Interdisciplinarity as a concept fit with co-operative values. As well, the CSC shared governance structure between university, co-operative sector and government reflected that broader co-operative spirit, building toward a shared goal. These themes can be found in particular in board commentary in the annual reports, a language emphasizing difference as strength.

Soon after the University of Saskatchewan began to use the term “interdisciplinary” in CSC board reports, Centre-scholars Brett Fairbairn and Murray Fulton published a CSC booklet on the concept of interdisciplinarity. Using their experiences at the CSC as an example, they argued that interdisciplinarity is a team-based approach to solving complex problems. The focus is around the common goal (looking at a problem, topic, or issue, for example) and to build a team where the work of solving the problem requires an integration of disciplines, deliberately crossing boundaries. The work of interdisciplinarity is not becoming adept in multiple disciplines, but to “interpret one’s own discipline to others” and to apply one’s familiar discipline in an unfamiliar setting. Moreover, they argue, true interdisciplinarity encompasses a broader range of people, where “the nonacademic members of it are more equal and more fully integrated into a team outlook” [Fairbairn and Fulton, 2000].

Writing a booklet on the concept of interdisciplinarity as practiced at the CSC was critical: Fulton was part of a cross-university contingent that was working to develop an interdisciplinary program at the university. Fairbairn and Fulton’s comments read at times like a position paper, showcasing the CSC as a successful interdisciplinary centre in the heart of a university somewhat averse to the concept. The first audience for that booklet was not the co-operative sector, but their University of Saskatchewan colleagues. It’s a fascinating use of CSC resources to self-publish an opinion paper to influence university direction. The results mattered: the new interdisciplinary PhD program was approved. Students could directly enter the new program and were no longer confined to a single college or department, but could take classes from across the university toward their degree. Once this program was in operation, the CSC could finally craft an interdisciplinary PhD concentration course on co-operatives, offered not just at the individual department level (as previous classes had been) but to students across campus. The interdisciplinary studies program officially launched in 2004.

At the same time, CSC scholars leveraged their interdisciplinary expertise and large co-operative connection into great success in landing and leading large grant projects which were built using an interdisciplinary collaborative perspective. In 2001, Brett Fairbairn led a major \$589,000.00 SSHRC project on social cohesion, the largest project to that date in Canada on co-operatives. On its heels in 2005, Lou Hammond Ketilson led a multi-year \$1.75 million-dollar SSHRC grant to study co-operatives as part of the larger social economy. These two grants solidified the CSC as a major centre for interdisciplinary study, funding multiple masters and PhD level students, all of whom could then take the new interdisciplinary co-op concentration course. These large grants carried a high administrative and facilitative component, leveraging the CSC’s staff base to extend research practice beyond faculty. At points of expansion, CSC staff and students carried a high productive load, producing publications and carrying out the main body of research. Such times brought “great energy” to the CSC, reported several staff and faculty during interviews [for example Scheidl 2018].

These grants grew the CSC reputation within the university community. By 2012, the International Year of Co-operatives, CSC board chair Beth Bilson, acting dean of the College of Law, noted: “In many ways, the Centre was a pioneer in types of research that now have a high priority in the academic world – research that is interdisciplinary and cross-disciplinary, rooted in partnerships with the wider community, and focussing on questions of immediate significance to society” [CSC Annual Report 2012]. Its interdisciplinary strength and community partnerships meant that the CSC fared well during external review processes, and became a Centre of Excellence for the university.

One of the scholars who came to the CSC during these major grant projects was Isobel Findlay, whose perceptions on the concept of interdisciplinarity deserve attention. Findlay argues that disciplinary study is largely about consolidating power and authority. To do interdisciplinary work, it is critical to understand “that there was a history to the production of discipline, there is nothing natural, it’s about construction of authority. Interdisciplinarity is about knowing those histories and recognizing the multiple sites of knowledge production, and learning to hear and respect each of them in their appropriate ways” [Findlay interview with author 2018]. Findlay articulated the starting point of the CSC’s work on building interdisciplinarity, through deliberately sharing and teaching disciplinary perspectives to each other. Yet Findlay’s observations point to knowledge production *outside* of disciplinary boundaries, such as within corporations, communities, First Nations and other cultural spaces. The major grant projects took researchers out of the university and into community-based centres, where knowledge is produced and understood very differently. In her view, true interdisciplinary work is humble, respects different ways of knowledge production, and is deeply embedded in community engagement [Findlay, 2018]. The CSC publishing

output reflected this more encompassing view, as community-based authors were added alongside CSC faculty, staff, and student authors on publications. Adding community knowledge to interdisciplinary work is especially important for co-operative studies, placing co-operative knowledge on an equal footing with academic perspective. Interestingly, this is a full circle back to the push in 1982-83 from the co-operative sector to hire an Executive Director for the CSC who had excellent co-operative credentials but lacked the academic *bona fides*.

After 2000 and particularly with interdisciplinary grant success, the University of Saskatchewan went from a space where interdisciplinarity was met with consternation and derision, to one where it was revered and rewarded. To that end, the university launched three new interdisciplinary schools in 2012 within the university: the School of Environment and Sustainability, the School of Public Health, and the Johnson Shoyama Graduate School for Public Policy (JSGSPP). These schools mirrored much of what Fairbairn and Fulton called for in their position paper 12 years before: problem-based centres parallel to existing university structures, where interdisciplinary networked scholars work to solve complex problems [Fairbairn and Fulton, 2000]. However, unlike centres, these graduate schools had the ability to create and run their own courses and programs.

By 2013, with Murray Fulton at the helm as executive director, the CSC entered into a partnership with JSGSPP, a move that supported a more long-term solution for teaching co-operative course content than the interdisciplinary studies program. Several core CSC faculty members – Lou Hammond Ketilson, Murray Fulton, Brett Fairbairn, and later Dionne Pohler and Marc André Pigeon – took positions within JSGSPP instead of disciplinary homes. Such a move assumes that the interdisciplinarity built into the policy school would parallel the original centre-scholar model of the CSC, but replace disciplinary homes with an interdisciplinary school. The thought was that these scholars pursue an academic path with a robust interdisciplinary toolkit. Others were not convinced of the administrative change. “It’s a narrowing of interdisciplinarity now through public policy.” [Gertler 2018; see also Hammond Ketilson 2017]. While an interdisciplinary school solves some issues outlined by Fairbairn and Fulton, their own core definition of interdisciplinarity is as the site of struggle and learning between disciplines. While the policy school might continue hiring from different disciplines, what are the structures to support internal learning? Fairbairn and Fulton’s paper also argued that true interdisciplinary sites need to be “flexible and adaptive, not designed to be permanent,” rather, designed to evolve continuously while maintaining a balance [Fairbairn and Fulton, 2000]. Does a school, with its complicated administrative processes, really support interdisciplinarity? Finally, can an academic school – as opposed to the original tri-partite agreement between the university, the co-operative sector, and the provincial government – continue to value interdisciplinarity as diversity of thought inclusive of non-academic contributions? These questions, as of 2019, remain to be seen.

The process of interdisciplinarity is also a factor of time. Over the years, each of the CSC faculty have picked up perspectives, tools, and viewpoints that have broadened each of their research capabilities. Fulton recalled, “All of us at the centre went on the same journey and became more interdisciplinary, more willing to accept and be fascinated by these other perspectives, to understand perspectives and to tell stories” [Fulton 2017]. From this view, interdisciplinarity is also the product of the journey, something that remains after the work is complete. In this argument each scholar who participates in interdisciplinary work becomes, over time, an interdisciplinary specialist, and so a good candidate to become part of an interdisciplinary school or centre. Yet being individually interdisciplinary after the fact seems inimical to the CSC faculty’s own explanation of the process of being and becoming interdisciplinary. Interestingly, two of the CSC faculty whose academic training could be viewed as interdisciplinary (in that each degree came from a different discipline) were two of the strongest voices against this definition of interdisciplinarity as the end result of a journey [Hammond Ketilson 2017; Gertler 2018]. Interdisciplinarity as an end product is, at best, a secondary definition, and not one supported by all of the CSC faculty. Moreover, this concept seemingly negates the importance of retaining close ties within a discipline, to understand and use and create new disciplinary-tested concepts and practices. If a scholar, lay person or professional is expected to pursue continual growth and development within their own discipline or position or interest, then the continuing engagement and re-engagement with others in the collision of interdisciplinarity remains fresh and fruitful.

Interdisciplinarity as a product of a journey also raises the question of cohort and time. At various points in its history, the centre attempted to refresh or add new members to the original cohort, but these attempts were met with

limited success.³² If interdisciplinarity is a product of a cohort journey, how do you add new people, staff, or community-based knowledge to that mix? Whose voices matter more, if time or experience is a factor? Time adds a too-problematic level of complexity to a definition of interdisciplinary studies, though it is probable that those who have undertaken an interdisciplinary journey are possibly more adept or receptive to multiple perspectives. Instead, it appears that at the Centre for the Study of Co-operatives, interdisciplinary strength and its true definition remains in the active collaboration, collision and sharing of disciplinary and non-disciplinary (staff, community, cooperative) perspectives.

It is also important to remember that the primary audience for co-operative studies is a unique mix of academics interested in co-operatives, and co-operatives themselves. The larger co-operative community has been a sustained supporter of the CSC in three directions: financially, as a main supporter with the University of Saskatchewan³³; via governance, with identified co-operative practitioners on the board; and as co-researchers on numerous CSC projects, many of which used co-operative or credit union data to underscore the research. Via the CSC self-publishing model, CSC scholars found a ready non-academic audience whose interests were less in the methods or theoretical underpinnings than in the outcomes and new information. This point serves to underscore the important connection between the co-operative community writ large and the CSC, as a full-scale partner in the interdisciplinary endeavour.

Co-operative scholar Ian MacPherson argued that the chief characteristic of co-operative studies is its “genuine interdisciplinarity” [MacPherson 2007a: 456]. Combined with the definition of associative intelligence, it seems clear that interdisciplinary studies are the work of co-operative and collective shared scholarship. CSC scholars continue to invest in the work itself: a number of recent publications reach for interdisciplinary ways to speak about, and to co-operatives. Fairbairn, Fulton and Pohler’s work on governance for co-operatives or design principles for credit unions are superb examples. Still, “it takes work and effort to value what interdisciplinarity means” Lou Hammond Ketilson [2017] noted. Interdisciplinary implies breadth, carries depth, is born of real work by a diverse group, is mobilized to solve complex problems, values diversity, listens with humility, and builds a legacy of expanded knowledge over time. Excellence will not come from even a dedicated scholar with interdisciplinary experience working alone. The experience of the Centre for the Study of Co-operatives has shown that it is in the struggle to work *together* that scholars and community-based practitioners produce interdisciplinary co-operative studies.

Conclusion

Interdisciplinarity was a critical component in the creation of the Centre for the Study of Co-operatives at the University of Saskatchewan. Yet, in the beginning, the concept was elusive and often fell along classic disciplinary lines with multi-disciplinary results. Truly understanding what interdisciplinary work is, what it looks like and how to do it well took serious and invested effort by both staff and faculty at the CSC. Coming together to share disciplinary perspectives and assumptions was critical in developing interdisciplinarity. Through discussing how each discipline would define a problem and set up research to investigate the issue, the CSC developed a cohort of scholars who shared knowledge and broke down disciplinary lines. They realized that interdisciplinarity is a process of the collision and explosion of thought, of teamwork with a shared goal, not an automatic product. The CSC faculty also worked alongside its co-operative partners, hand-in-hand with research and communications staff, and with incoming graduate students from across the university. The concept of interdisciplinarity expanded to include and welcome non-academic and community-based perspectives as critical problem-solving components. Co-operative studies have become interchangeably understood as, by their nature, interdisciplinary and shared. Finally, time played a role. Over time, those involved in co-operative studies at the CSC who have taken the journey to actively pursue interdisciplinary work have in turn coached and led both the University of Saskatchewan and their co-operative partners to a more clear understanding of what it means to be interdisciplinary, as something quite different from multi-disciplinary or cross-disciplinary. Those aligned with the CSC also become in and of themselves more receptive to interdisciplinary work – although it seems less clear that, in the CSC experience, interdisciplinary work automatically produces interdisciplinary scholars. That concept was contested. What is clear from this short history of the Centre for the Study of Co-operatives is that the connection between co-operative studies and interdisciplinarity is about deliberate sharing, working together through adversity and different perspectives to become or build something wholly new and different.

References

- Centre for the Study of Co-operatives (1989-2017). *Annual Reports*. Saskatoon, Saskatchewan: Centre for the Study of Co-operatives.
- Centre for the Study of Co-operatives. (1985-2017). *Director Reports*. Saskatoon, Saskatchewan: Centre for the Study of Co-operatives.
- Fairbairn, B., Bold, J., Fulton, M., Hammond Ketilson, L., & Ish, D. (2001). *Co-operatives and Community Development: Economics in Social Perspective*. Saskatoon, Saskatchewan: Centre for the Study of Co-operatives.
- Fairbairn, B., & Fulton, M. (2000). *Interdisciplinarity and the Transformation of the University*. Saskatoon, Saskatchewan: Centre for the Study of Co-operatives.
- Interviews: Bill Turner, Brett Fairbairn, Carol Hunter, Chris Axworthy, Dan Ish, David Laycock, Isobel Findley, Lou Hammond Ketilson, Michael Gertler, Mitch Diamantopolous, Murray Fulton, Myrna Hewitt, Patty Scheidl, Ted Turner, Vern Leland, William Nelson. All interviews conducted with Merle Massie in 2017 and 2018.
- Leo Kristjanson fonds, President's Fonds, RG001 Series 6 Box 12. University of Saskatchewan Archives.
- MacPherson, I. (2007a). *One Path to Co-operative Studies*. Victoria, British Columbia: British Columbia Institute for Co-operative Studies.
- MacPherson, I. (2007b). "A Personal View of the Highs and Lows in Starting the British Columbia Institute for Co-operative Studies. *Journal of Co-operative Studies*, 40:(2), 41-46.
- Ponomariov, Branco L., P. Craig Boardman, "Influencing scientists' collaboration and productivity patterns through new institutions: University research centers and scientific and technical human capital," *Research Policy*, Volume 39, Issue 5, 2010, Pages 613-624, ISSN 0048-7333, <https://doi.org/10.1016/j.respol.2010.02.013>.
- Repko, Allen F., Rick Szostak, Michelle Phillips Buchberger. *Introduction to Interdisciplinary Studies*. SAGE Publications, November 2016 (e-book).

Notes

³¹ See key concepts from The Resilience Alliance: <https://www.resalliance.org/key-concepts>.

³² A deeper investigation of this issue was developed for the book-length history. It is not reviewed here.

³³ The government of Saskatchewan's financial and other support waxed and waned throughout the CSC history. That information can be found in the book-length history.