Forming a health and social care co-operative:
A case study in a British Columbia community

by

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ABSTRACT

This case study examines the development of a co-operative to govern a collaboration of health and social service agencies in a town in British Columbia. Community action research was the methodology used to answer the question 'What are the possibilities and issues of co-operative governance for collaboration among nonprofit agencies?' Documents, participant observation, and interviews constituted the data. The analysis is presented in four ways: the chronological stages of development; the way the participants began to act like the co-op they wanted to become; the features of membership in comparison to the seven Principles adopted by the International Co-operative Alliance; and the issues of concern. The findings are that participants established a shared vision, formed new relationships in a network governed as a co-operative, and added new resources to enhance the social capital of the community. A co-operative governance model, newly possible after changes in the BC legislation governing co-operatives, was chosen and put into practice because it was seen as innovative, flexible and egalitarian. This choice indicated a new purpose, to build mutual trust and a sectoral voice within the social economy through co-operative practice. The members expect that their co-operative will help them cope with change by providing a forum for learning and consensus building. The development of the co-op can claim to be health promoting because it built social capital and increased community control of conditions affecting the lives of children, youth and their caregivers.

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To all my relations, blessed be.

CHAPTER ONE

INTRODUCTION

I believe it is important to educate the public about how important understanding and supporting the early years of motherhood and childhood is to both community and individual health. While raising my own children I became an active volunteer in a food co-op and a preschool co-op. I spent years involved with the schools as a parent and teacher and, in 1984, I helped found a family resource society. During the nineteen eighties and nineties I took a leadership role as the family resource society pursued opportunities to sign contracts with various government authorities, raised funds to renovate premises, and co-ordinated volunteers and staff to offer programs and services. This nonprofit society worked to achieve and maintain a 'neighbourhood house' style setting for family support programs. As the society was looking for ways to strengthen its capacities and participate in the policy making process, I had the opportunity to participate in regional coalitions and research projects. One particularly interesting research project was conducted by the Community Health Promotion Coalition, at the University of Victoria, entitled *Collaboration in Non-Profits: Shared Resources as a Strategy To Alleviate Scarce Resources* (Mullett, Jung, and Hills, 2002). I was aware that the society had decided to try doing its own research.

The family resource society received a community development grant from the regional health authority to conduct a 'feasibility study' with regards to developing an expanded 'neighbourhood house' (Summer 2000). I attended the Fall 2000 presentation of the feasibility study results and, a few months later, heard that a development committee had been formed to take up the feasibility study's recommendation to develop

an interagency 'Child, Youth and Family Centre' governed by a co-operative association. The study stated that important issues for the governance structure of this proposed centre included: ensuring that it could be representative of the diversity of human service agencies in the area, keeping it as simple as possible, and allowing flexibility to improve responsiveness to changes.

My personal experience with the preschool co-op was very positive, helping me meet other families, develop friendships, and learn about healthy child development, parenting and co-operative governance. I was intrigued to learn that a co-operative structure was possible for a collaboration of nonprofits and wanted to learn more about the details of such an arrangement. I wondered if the benefits I had experienced as a co-op parent might be mirrored by the benefits a nonprofit would experience in a co-operative setting? I also remembered the challenges I experienced in a co-op. Not every kind of parent had the capacity to be involved. Fees had to be paid, good mental health and social skills were a distinct advantage, and frequent changes of membership brought educational challenges.

The idea for an interagency centre had attracted the interest of a large philanthropic Foundation with a mandate to promote the health of children and youth. I wondered how the Foundation would respond to the idea of a co-op. I also wondered how the Foundation's involvement might work. The Foundation is based in the nearby city and is attentive to a broad geographic area. From my work experience, I knew that remaining engaged with health and social service stakeholders in neighbouring communities was a challenge for the family resource society. I wondered what would

happen when nonprofits worked with a diversity of stakeholders from outside the community.

A complex network operating on two levels developed: a local network and a district-wide network. For the purposes of this case study my community is named Coho, and my interest is focused on the local level where the various agencies formed the Coho Co-op. There is another inextricably connected level, however, that includes neighbouring communities, district-wide health and social service providers, and the Foundation. The school district in which we live is a sprawling suburban and rural area, containing three separate residential concentrations. A tandem development connecting all the stakeholders at the district level was a necessary part of the Coho development. The district is named the Salmon district. The reader of this case study is guided to follow the developments in Coho while appreciating the impact of Coho's involvement with the Salmon district and with the Foundation.

The proposed co-operative centre will be a new community asset, using a new governance format. For my thesis research in Studies in Policy and Practice, I decided to analyze the development of the Coho Co-op. The analysis is guided by the search to understand how personal interests, nonprofit capacity and priorities, stakeholder policy making and legislation shaped this development. The research question is: What are the possibilities and issues in co-operative governance for collaboration among nonprofit agencies?

Chapter Two of this thesis describes the context of a growing and changing social economy, including co-operatives of the type known as stakeholder or solidarity co-ops, together with concepts of health promotion and social capital. Chapter Three describes

the methodology of Community Action Research, featuring a case study design. Chapter Four contains the findings, presented in four ways; a chronological story, a theme, a description of members' purposes and roles, and a summary of issues of concern. Chapter Five contains a discussion of the findings and their contribution to knowledge about social capital and the part citizens play in developing healthy communities, as well as knowledge about features of co-operative governance structures that may be of interest to stakeholders in the field of health and social services.

CHAPTER TWO

CONTEXT AND CONCEPTS

2001 was the 'Year of the Volunteer', highlighting the size and scope of the voluntary sector and focusing attention on strategies for addressing the critical issues that are emerging in a shifting context. There has been much reflection and writing about current trends.

Canada's Growing Social Economy

A 1997 national survey on volunteer activity revealed that 7.5 million Canadians (33% of adult population) volunteered their services to the more than 80,000 nonprofit organizations that make up the formal voluntary sector (Rice & Prince, 2000). Although voluntary activities have always been a part of Canadian life, "changing government roles, increasingly diverse populations, and new social and economic realities are requiring the sector to broaden, deepen, and adapt its approaches—and to do all of these at once" (Broadbent, 1999: ii). In British Columbia, during the past twenty years, there have been dramatic changes in the conceptualization and delivery of social services (Reckart, 1993; Wharf and Clague, 1997). There has been a reduction of direct service by the government and an increase in the use of nonprofits through contracts for service delivery. These nonprofits depend on volunteers, especially for their boards of directors. Even a small town like Coho (with 11,640 people) has several local nonprofits and receives additional services from regional agencies. An environment of multiple stakeholders has developed.

The *Societies Act* enables the contractual relationship between a nonprofit society and government. Such contracts define a reciprocal relationship enhanced by resources from both parties. The increase in contractual arrangements has given rise to considerable debate about issues that come with contracting, such as clarifying roles and formalizing the relationships between nonprofits and their various partners, primarily the government but also other nonprofits and philanthropic leaders such as Foundations and wealthy donors (Lewis, 1993; Weisbrod, 1997; Corbin, 1999). There are those who argue that "none of the negatives associated with contracting are *inherent*" (Hudson, 1998. p. 12); others argue that nonprofits worry about state priorities derailing the grassroots intentions of their organization (Brodie, 1995; Ng, 1988; Callahan, 1997; Aronson and Sammon, 2000).

The objectives of social service nonprofits have expanded from a tradition of charity to those in need to encompass mutual aid, education, and other purposes beneficial to the community. Women have made a significant contribution to the growth of the voluntary sector to meet needs linked to their economic and social position (Vaillancourt, 2002), combining care of home, children and elders with earning a living. While reliance upon the goodwill of volunteers remains, the new contract-based context has taught the nonprofits the benefits of sources of income other than donations. The term nonprofit more accurately reflects their current economic position. Revenue generating businesses, such as providing childcare or operating a thrift store, are increasingly accepted as part of the activities of a nonprofit since any surplus revenue is retained and used to support charitable purposes.

A 2000 National Survey of Giving, Volunteering, and Participating revealed a 15 per cent drop in the volunteering rate since 1997 and a 56-million hour decline in total volunteer hours. How is it possible that the voluntary sector is growing while volunteering is decreasing? It is possible because nonprofits rely increasingly upon employees to provide consistent high-quality services and the role of the volunteers has more to do with management, governance and public relations. A distinction has arisen between 'social labour', where volunteers support their organization as described above, and 'volunteer service', where volunteers serve the public directly. (Quarter, Mook and Richmond, 2003). Professionalism is on the rise as nonprofits become employers. Businesslike methods and accountability for results are important aspects of a successful and ongoing contractual relationship. For the volunteers, there has been a great deal of individual skill-building and organizational learning (Carver, 1990; Fisher, Ury & Patton, 1991; Morgan, 1997; Saidel, 1998; Chinn, 2001). Volunteering has become a formal undertaking requiring training and commitment. The work of volunteer training, co-ordination and supervision has become a paid job in many nonprofits.

The relationship between those who are paid for the social service work they do and those who are not can be problematic. For example, volunteers may prefer to work in the evening, while paid employees prefer to work during the day. Directors of governing boards have a mandate to shape the direction the agency takes but staff may see influence as interference. Many nonprofits depend on long term volunteer leaders for continuity, strategic planning and policy making, but some look to staff for this kind of leadership. Attention has been paid to the troubling issue of ethics and practices of a society and a sector relying on unpaid or poorly paid work that is clearly gender, class and race based

(Abrahams, 1996; Stall and Stoecker, 1998; Neysmith & Reitsma-Street, 2000). Volunteers and directors are generally sensitive to power imbalances. They are looking for ways to ensure that their voice is heard and that their recommendations influence actions taken.

Nonprofits have developed the capacity to provide many services, developing sophistication in relationships with donors, government, and customers. The volunteers who govern this sector have also started to examine how they interact with business and the market economy (Hammack & Young, 1993). Traditionally, capital invested in the private sector has very weak social ties (Quarter, 1992) and, in our current era of globalization, this fact is increasingly pointed out by social justice advocates demanding accountability for the role of business in supporting or damaging the social fabric. Approximately 1% of the income received by the charitable sector comes from corporations (Broadbent, 1999).

The volunteers and staff of nonprofits feel the need to be advocates for supportive and preventative services and promoters of social justice and community development (O'Donnell et al, 1998; Hudson, 2000). In 1992 Quarter wrote that

> non-profits lack a tradition of perceiving themselves as part of a unified social movement. Rather, they are organized to meet particular needs not being satisfied through the private or government sectors. Their identity tends to be tied to their service, and sometimes to other organizations providing the same service (religious organizations, for example) rather than to a common movement with other non profits or to a broader social economy" (p.41).

Ten years later, in a newspaper published by the Canadian Centre for Philanthropy, a front-page article states that "The greatest value of the voluntary sector may not be its programs and services, but its ability to bring citizens together to identify and tackle social issues." (Nyp, 2002, p. 1) Nonprofits increasingly promote community-based

governance and priority setting as being most likely to be responsive and adaptable in a fast-changing environment. As this sector grows, there has been an increasing impetus to improve the abilities of nonprofits to 'speak with one voice', to influence policy, and to seek financial support for community development initiatives and advocacy (Panet-Raymond, 1999).

The increasing use of the term social economy represents an approach that broadens, deepens and adapts our concept of the voluntary sector, particularly by its inclusion of co-operatives. By virtue of a governance structure that is voluntary and democratically chosen by members, co-operatives share essential common ground with nonprofit societies, particularly those societies focused on mutual aid.

> The purpose of forming a co-operative is to satisfy a need that the founders do not believe can be met by a standard form of organization; so it is not surprising that the supporters of co-operative movements, over the long term, are those not bound up in standard institutions, but instead those with less power in the other structures of society, and particularly those lacking economic power.
> (Fairbairn, in Fulton, 1990, p. 137)

The term social economy implies a vision of social values as well as economic impact, and helps describe the overall societal role of independent, democratically controlled organizations created to provide service to the public through membership. The participatory democratic nature of these organizations is both a strength and a weakness. The strength is that they can deliver an accurate representation of the informed opinion of groups of committed and active individuals. This effort to represent citizens' views is an example of the social values that drive the social economy. The weakness is that ongoing democratic dialogue and consensus building takes time and effort. The resources required to ensure a co-operative democracy within a voluntary organization are, in effect, a

business liability in a competitive environment as well as in the policy-making environment (Fulton & Laycock, 1990). This ongoing liability may become a serious issue in stakeholder collaboration.

Changing context for co-operatives

The Co-operative movement has been active in Canada since the mid nineteenth century, evolving through trial and error and building upon success. The continuum of variety in co-operatives contains dramatic opposites: large-scale co-operatives, professionally managed and powerful in the marketplace, to small localized consumer-oriented co-operatives that celebrate a mutual help social philosophy (McGillivray and Ish, 1992). The economic environment in the 1930s, 40s and 50s discouraged utopianism and brought a change from the 'friendly society' phase to the 'systems' phase, with an emphasis on professional management, consolidation and competitiveness. Recently the middle ground of the continuum has filled in and there are many types of co-ops: financial, consumer, supply, marketing, production, and service. Co-ops are increasing in number (Gagne and Roy, 1998), with service co-ops accounting for 70% of all non-financial co-ops in Canada. Service co-ops include housing, daycare and preschool, health clinics, transportation, utilities and communication. In urban areas, housing co-ops have led the growing trend. In rural areas, utilities, recreational and daycare/preschool co-ops are the three most prevalent. According to James Naylor of the University of Winnipeg, the ideals of the new, largely urban co-operatives "reflect less the ideals of Rochdale or of prairie populism than of feminism and urban community organizing" (in

The Canadian Historical Review Vol. LXXIV, No. 1, p.131). It appears that the co-operative association is an adaptable governance model.

In 1995 the International Co-operative Alliance adopted a Statement on the Co-operative Identity (MacPherson, 1996). The International Cooperative Alliance felt "a need to provide a clear vision of what made co-operatives unique and valuable", to identify "how co-operatives should play a role in societies undergoing rapid change" (Ibid, p. 4). Co-operation is a word that means willing to work with others, and the seventh principle acknowledges that co-ops "have a special responsibility to ensure that the development of their communities – economically, socially, and culturally – is sustained" (Ibid. p. 27). The Statement includes seven co-operative principles and states that they are guidelines by which co-operatives put their values into practice. They are

1. Voluntary and Open Membership
2. Democratic Member Control
3. Member Economic Participation
4. Autonomy and Independence
5. Education, Training & Information
6. Co-operation Among Co-operatives, and
7. Concern for Community.

The Canadian Cooperative Association / BC Region (CCA/BC) has been active in recent years working with government to make changes in BC legislation governing Co-ops. *Solutions 2000*, a three year plan to expand the role of the co-operative/credit union sector in BC, was presented in a 1996 report. Goals included "making provincial legislation, policy, programs, and advisory structures conducive to co-operative sector growth and vitality". A new act, the BC Cooperative Association Act, came into effect January 31, 2001.

This new legislation allows for co-ops to be incorporated by a minimum of three members, a reduction from five, and a federation of co-ops may be established by three rather than twenty-five member co-ops. Membership can be held jointly if the co-op permits. Members can be divided into different classes of members, with differing rights, obligations and limitations if the co-op so determines in its rules. The Act reflects the seven international co-operative principles named above (MacPherson, 1996). Societies, as well as other legally constituted governmental (provincial and municipal) and First Nations organizations, are eligible for membership if the co-op so chooses. These changes permit the creation of 'multi-stakeholder co-ops' (Borzaga and Santuari, 1997) and have provided important flexibility. Birchall (1997) states "another example of the commitment to community is in the development of multi-stakeholding in co-ops" (p. 233). With respect to economic participation, the Act recognizes that members contribute to the capital of the co-operative, but does not exclude capital from non-member sources. Co-operatives may establish reserves or retained earnings. The new Act significantly reduces the number of documents that must be filed and voting provisions have been modernized.

The Act does not include all the features the Canadian Cooperative Association / BC Region had sought. In particular, there are no specific provisions for non-profit co-ops. Ordinarily co-op members have a business interest, which includes mutually beneficial redistribution of profits. There are, however, existing provisions in the Act for housing co-ops and for co-ops with a non-profit dissolution rule to ensure that assets remain under collective control. No investment shares may be issued and there is, therefore, no claim on the assets by investors. For non-profit societies, the non-profit

dissolution clause, which specifies that assets must be transferred to another organization with similar purposes or to a registered charity, is required by the Societies Act and constitutes an important feature that clarifies the public interest. The Co-operative Association Act Part 14 says that co-ops *may* make a similar provision and *may* further designate it 'unalterable'. If they do so, then they may not issue investment shares. This enables a co-op to set itself up in a way that *may* convince the Federal government to allow such an organization to obtain charitable status. In addition, the Canadian Cooperative Association / BC Region, had wanted the Act to provide for the conversion of non-profit societies into non-profit co-operatives. No such provision was included and they now suggest that such provisions may be considered when the Society Act is revised.

Nonprofits and some kinds of co-ops (housing, daycare, and health for instance), are similar in that they are "designed to meet particular needs, which constitute an important motivating factor for staff, clients, and funder" (Lindquist, 2001). Nonprofits that serve a membership have more in common with co-operatives than with nonprofits oriented toward the public at large such as hospitals and universities. (Quarter & Sousa, 2001) Co-ops and membership-oriented nonprofits share a sense of the importance of recruiting and involving members, a grassroots approach that has emphasized democracy and autonomy. These similarities, combined with enabling legislation, make a co-operative governance structure an attractive possibility for legally formalizing a collaboration of nonprofits.

Another explanation for the attraction of the co-op model for the Coho development committee may be the preponderance of women involved. Women

volunteers predominate in health care, education, and early childhood development fields (Rice & Prince; 2000). The "women centred model of community organizing" (Stall and Stoecker; 1998 p. 736) features principles of collective action and decision-making, goals of empowerment, and structures that stay small and grounded in the lives of the participants. A BC activist reflected about the connections between women and co-ops;

> Frequently small and horizontally-structured, co-ops reflect the form of collective action and decision-making that characterizes many women's organizations. The concept of many hands working together productively is much more common than concerns about too many cooks spoiling the broth. The opportunity to participate is also supported by a commitment to individual empowerment. The recognition of skills and the building of confidence are major areas of expertise for both women's organizations and co-ops.(Conn; 2001, p. 34)

Women might be reassured by the fact that the International Co-operative Alliance Principles adopted in 1995 include specific mention of gender equality, although the Co-op movement itself has acknowledged that systemic barriers have kept women from participating equally. (Ketilson, 1998)

Many community-based nonprofits are small in size and scope of operations. A popular truism these days is 'Size Matters'. While community based child, youth and family serving agencies may find that small is beautiful when it comes to daily human interactions, the challenges of dealing with the public and private sectors and achieving efficiencies in marketing and delivering services seem to call for a larger scale of endeavour. By remaining as unique societies, but joining together as a co-op, nonprofits aim to address this contradiction. In Coho's situation, a Foundation is willing to support an endeavour that demonstrates the co-operation of many nonprofits, whereas it would not be willing to deal with each agency individually. The co-operative movement has the added attraction of being a world-wide phenomenon, fostered by the 6th principle of co-

operating with co-operators. The co-op model allows the participants to act locally and think globally.

Concepts of Health Promotion and Social Capital

Clarification of terms and their meaning is a challenge for nonprofits and co-ops. "People involved in co-operative development must be aware of the power invested and represented in language... To use language uncritically in co-operative development amounts to ignoring the small but important steps toward empowerment contained in the process of communicating and learning to define ourselves and make important choices in our lives" (Bowman, 2001. p. 7). The collective understanding arising from clarification of terms advances our knowledge and helps solve problems. During the development process described in this case study, the importance of language was featured. A glossary of terms was circulated, as an evolving document, to the various stakeholder representatives to help promote a common understanding of the language being used during the development process. An expanded version of that glossary is included in Appendix A.

While many specific terms were defined, some expressions used during the development process encompassed concepts that caught my interest and shed light upon some of the knowledge and assumptions that have shaped my viewpoint. A review of literature contributed to my understanding of health promotion and social capital.

An important focus and new direction of both health and social service has been the awareness that health is broadly determined by: relative equality or inequality of income, control of living and working conditions, healthy beginnings, and social capital.

This is known as Health Promotion (WHO, 1997). Citizen engagement and community capacity building or empowerment is seen as an important emphasis for health promotion practice (Labonte, 1993,1994; Laverack and Labonte, 2000; Smith, Littlejohns and Thompson, 2000). The Coho Co-op's development process may be seen as health promoting if it can be demonstrated that it has contributed to a beneficial change in one or more determinants of health. This concept also informed the choice of community-based, action-oriented research as an appropriate methodology for this case study, because the community gains an unusual degree of control in the research process.

Social capital is a term introduced in 1988 by James Coleman to help build a bridge between sociology and economics, to explain the "product" or benefit of people working together for social purposes. Social capital is found in the structure of relations between actors, not in the actors themselves or in physical assets. It has been defined as "the capacity to create our communities through networks and the trust they engender and relies on citizen participation in creating healthy families and communities" (Coleman, 1988, cited by Ricks et al, 1999 p.39). The capacity of social capital to generate collective goods and services is observable, although it is somewhat difficult to prove cause and effect. It is suggested that the health and social service networks developed for mutual and community benefit will feature savings and quality, member satisfaction, education, caring, and opportunities for participation that promote an equitable reflection of gender, ethnic and cultural diversity.

Social capital is a very context-dependent concept (Edwards & Foley, 1997) that may make it seem vague and unspecific. Kenneth Newton (1997) has described core features of social capital as norms, networks and resources. Attitudes of caring and

mutuality are especially needed to build a community with shared interests, shared assumptions about social relations and a sense of common good. Norms are formed from shared principles and values. Working together is unlikely to be successful if the values and assumptions of the people involved are not congruent. While there is no overarching statement of principles agreed to by the wide variety of health and social service stakeholders, the following examples indicate what they are. The vision statement of the family resource society that became a member of the committee developing the stakeholder co-op in Coho is:

> We are Dedicated to Building a Healthy, Empowered Community
> by Promoting Life-Long Learning, Mutual Caring and Respect
> (pamphlet, 2000)

Implied in this statement are principles of health promotion: the importance of community in problem posing and policy decision making, human interdependence, and a rejection of professional dominance (Labonte, 1995). Another expression of the principles of nonprofits, derived from the experience of Frances Ricks and her associates, states

> Every community and community member has the capacity to be different.
> You can start anywhere and with whatever you have.
> Healthy communities and healthy individuals are interdependent.
> Respect for the dignity and worth of people promotes equal opportunities and access to resources.
> (Ricks, Charlesworth, Bellefeuille and Field, 1999. p. 39)

An Ontario nonprofit community organization for children expressed their principles as objectives: "To promote active participation of members; To create egalitarian work relationships; To nourish dailiness; To care for caregivers; To expand the capacity to act powerfully; and To nurture partners and networks." (Reitsma-Street and Rogerson, 1999. p. 289) These similar expressions indicate that, among these types of organizations,

collective action and egalitarian environments constitute the practical features of health and social service that they value. Words like care, nourish, and nurture suggest the purpose of their collective action. Words like capacity, equality and interdependence suggest the means for empowering participants and enhancing their relationships.

The ICA Statement on the Co-operative Identity (1995) demonstrates that co-operative values are congruent:

> Co-operatives are based on the values of self-help, self-responsibility, democracy, equality, equity, and solidarity. In the tradition of their founders, co-operative members believe in the ethical values of honesty, openness, social responsibility, and caring for others. (MacPherson, 1996)

Central to all these normative statements are concepts of caring and mutuality.

The concept of care is a complex one, and has recently been defined in some helpful detail.

> On the most general level, we suggest that caring be viewed as a *species activity that includes everything that we do to maintain, continue, and repair our 'world' so that we can live in it as well as possible.* That world includes our bodies, our selves, and our environment, all of which we seek to interweave in a complex, life-sustaining web. (Tronto, 1993, p. 103)

This definition works against the grain of conventional wisdom. Rather than thinking that care involves just human interaction with others, Tronto argues that caring occurs for objects and for the environment. Rather than thinking that caring is "dyadic or individualistic" (Ibid., p. 103) she thinks of care as a social and political function in a culture. Rather than thinking of care as a cerebral concern or character trait, she thinks of care as a practice and process of everyday living.

Tronto describes care as consisting of four analytically separate, but interconnected, phases and uses examples from everyday life to support her concepts. *Caring about* is a concept that involves noting the existence of a need and making an

assessment that this need should be met. *Caring about* can occur on a personal level or on a social and political level. She speaks of our individual response to pan-handlers or to media images of starving children. She also reminds us of agency or government responses to situations of need, such as homelessness, described in *caring about* terms. *Taking care of* describes a second phase of caring which involves taking responsibility to act, as demonstrated by volunteers who organize and operate a nonprofit. If nothing is done, no *taking care of* occurs. Providing money does not satisfy a need directly, but could be a part of *taking care of. Care-giving* involves physical work and actual contact with the objects of care. *Care-receiving* recognizes response to care, an important final phase of caring because it is the only particular way to assess the adequacy of care provided from the perspective of those who receive care. This concept is helpful because it connects a wide range of activities with an underlying or core value held in common.

Recently Johnston Birchall suggested that the word 'mutuality' might be used as a gender neutral synonym for fraternity, a sense of common citizenship. This ideal has received far less consideration than either liberty or equality in the past. He states that the concept of mutuality "has the virtue of connecting abstract discussions of democracy and community with real organizations that are meant to encapsulate these into their design." (Birchall, 2003. no pagination). Co-ops have always emphasized the mutuality of their approach, as have many nonprofits. There is a rhetoric emerging about a 'new mutualism' in public policy (Birchall, 2001). It has been suggested that the third sector and co-operative services have the potential to provide an alternative to privatization of public services (Pestoff, 1992; Restakis and Lindquist, 2001). Organizations in the social

economy demonstrate norms of caring and mutuality that not only help build the social capital required for such an undertaking, but also explain why they might wish to.

Besides norms, Newton states that networks are an essential feature of social capital. Each nonprofit involved in the Coho development group is a network of citizens and a stakeholder in health and social service delivery. A great deal has been written about formal and informal ways for all stakeholders to work together and the importance of developing effective connections to further build social capital (Kuyek, 1990; Butterfoss, Goodman, Wandersman, 1996; Kegler, Steckler, McLeroy, Malek, 1998; KcKieran, Kim and Laskers, 2000). Interlocking relationships are key and the ability to network is as important a skillset as organizing or managing. The informal and emotional nature of relationships, the 'untidy creativity' of highly diverse connections, are features of working together that allow a system to maintain itself in a state of equilibrium (Gilchrist, 1998, 2000).

In this context, it is helpful to imagine a continuum of working together, from informal networking and co-ordination to more complex forms, such as *co-operation, collaboration, coalitions or partnerships*. *Co-operation* adds the sharing of resources and results to the list of activities related to networking and coordination. *Collaboration* is seen as an emergent inter-organizational arrangement that can confront and solve complex problems (Sink, 1998). One publication that was shared among the stakeholders in the development of the Coho Co-op outlined several collaboration models; a consortium, a virtual agency, and co-location through a Host Agency, a nonprofit Society, a Limited Company or a Co-operative (Hutchinson, 1999). *Coalitions* generally have broader purposes, often related to influencing public opinions and government or

corporate policies. They are seen as a vehicle for agreeing on the politics to move beyond ethical pronouncements to action (Schuftan, 1999). *Partnerships* have elements of equality and formal commitment, focused on mutual gain and ongoing negotiation of roles and responsibilities (Courtney, et al, 1996; O-Donnell et al, 1998; Hudson, 2000). In this case study, the primary focus for working together as stakeholders was *collaboration* through co-location. Many of the formalizing elements of *partnership* were also important.

Networking is described as a relationship-driven theory for practice that contributes to community building or "assets" (Kretzmann and McKnight, 1993; Gittell and Vidal, 1998; Trevillion, 1999). There are new ways of thinking about the contribution of citizen participation in a democratic society. "In the 1990s it is increasingly realized that democracy is much more than liberty and requires a range of values, attitudes, and assumptions of the kind that comprise social capital" (Newton, 1997. p. 576). Participatory experience is suggested as the best way to engender civic identity (Youniss, McLellan & Yates, 1997; Moffat, George, Lee and McGrath, 1999; Shaw and Martin, 2000). Current thinking suggests that it is important to evaluate citizen participation in any activity in terms of inclusiveness and ongoingness (Parr, 1993) because these are features needed to build shared norms and social connectedness. Networks are an essential feature of social capital because they provide the forum for achieving consensus about the use of resources and power.

It is the resources, and the decision making power that guides their use, that constitutes the third essential feature of social capital. They also represent the most measurable aspect of social capital. When the community has the opportunity to

collaborate to make best use of a generous donation, they are empowered to make decisions that will have an impact upon many people.

Power, according to a dictionary definition, is the ability to do or act. Women's community participation has resulted in extensive negotiating of power and identity within families and in the community (Abrahams, 1996). Practices of developing shared norms and networks reveal the complex functions of dominant social forms and reactions to them such as innovations or opposition. "Because power is productive, it is up to us to produce new forms, after seeing through that which is all too familiar, and to realize that those new forms will generate new possibilities as well as new constraints." (Chambon, 1999. p. 71) The concept of power has been differentiated by Amy Allen to move beyond one-sided conceptions of power, such as domination or empowerment, to a theory of power that is "complex enough to illuminate women's diverse experience with power" (Allen, p. 29). Allen describes three types of power:

a) 'power over', not only the specific action of domination but also those forms of 'power over' which occur in "routine and unconsidered ways" (Lukes, 1986, cited in Allen, 1996, p. 33),

b) 'power to', not only actions taken to resist or confront 'power over' but also those forms of empowerment which occur despite the experience of 'power over' and

c) 'power with', not only actions of specific solidarity but also the many forms of collective power.

I found that the idea of 'power over' helped me to understand the dominance inherent in current practice, while the idea of 'power to' explained how the various stakeholders

could contest and innovate to transform practice. The idea of 'power with' illuminated an important aspect of social capital, a consensus about the use of resources.

In sum, caring is a practice, and so too is the exercise of power. Both permeate the complex negotiations of relationships in this case, penetrating the ways people work together to create new forms for the delivery of health and social services. Both are essential for building the social capital required for the social economy and for health promotion. How caring and power are practiced affects the development of social capital. If social capital can be increased using empowering decision-making practices imbued with the shared norms of the networks involved, it can improve the health of the community. The context of contracts for the delivery of health and social services is changing and is opening up new possibilities for creating social capital, including co-operative governance - another sort of legal connection that emphasizes ongoing reciprocal caring and power-sharing. The focus of this research is to detail how a co-operative governance structure satisfies the needs and aspirations of stakeholders in health and social service.

CHAPTER THREE

RESEARCH DESIGN AND METHODS

The research objective was to conduct a case study examining the activities and decisions of the Coho development committee as they created a co-op as a framework for collaboration, to answer the research question 'What are the possibilities and issues in co-operative governance for collaboration among nonprofit agencies?' The purpose was to document and analyze the process so that others will know how agencies, like those in Coho, could respond to an opportunity to work together. This research reflects my respect for their efforts and may contribute to the community members' confidence. It may provide evidence to further an understanding of the part citizens play in developing healthy communities, the elements of social capital, and the features of formal co-operative governance that have enabled the collaboration of health and social service organizations.

This is my world

I am part of what I am studying by virtue of extensive involvement in two agencies that became members of the co-op and because I have raised a family in this community. It made sense to find a research design that celebrated community connectedness as well as critical curiosity. I wanted to do something useful for my community as well as produce a thesis. In community action research, I found a methodology that respected community values and relationships, was action oriented, and

could be undertaken as a mutual endeavour (Reitsma-Street, 2002). The hope is that this research will help the community "remember itself" (Stoecker, 1997).

Community Action Research

Action research is a general term that encompasses a number of research methodologies that emerged in the latter half of the 20th century in support of a worldview "that sees human beings as cocreating their reality through participation: through their experience, their imagination and intuition, their thinking and their action" (Reason, 1994, p. 262). Each approach emphasizes different aspects of participative inquiry: dialogue and liberationist education (Friere, 1972), co-operative inquiry (Heron, 1995), a critical approach (Maguire, 1987; Lather, 1991) and goals of empowerment (Hall, 1981; Fals-Borda and Rahman, 1991), among others.

Community action research is an emerging action research methodology for value-based research that includes ten processes that people undertake collectively to learn and to act for the benefit of their community. Brown and Reitsma-Street have written about the values of Community Action Research as a circle with four directions, illustrating how each value of social justice, agency, community connectedness and critical curiosity come together (Brown and Reitsma Street, 2003). Many development committee members expressed a critical curiosity about their own process and a desire to ensure that important issues, such as resolving tensions and contradictions, and addressing the interests of those who are not able to participate, were not ignored as they worked together. The choice of the community action research approach was intended to feature the community focus of this work and to recognize that the development

committee was a network of people with similar social justice values and experience in social service agencies supported by many citizens. When the Coho development committee considered the request to document their activity through research, the community action research processes that informed the research workplan seemed to flow easily with and into the larger activities of the group. The "ten processes of CAR" (Reitsma-Street, 2002, p.74) became evident in the study, both in the overall activities of the committee and in the research effort. The ten processes are not sequential, but advance the progress of the research differently and at different times. The following description indicates how the development process included the research.

Ten Steps to conduct Community Action Research

1. Decide to join together to address a community concern.

In the late Fall of 2000, there was a public process of consultation that inspired individuals connected with various Coho nonprofit agencies, a charitable Foundation, representatives of the health and child welfare authorities, and representatives of more informal associations of citizens, to work together. The decision to co-operate in a formal research project emerged nine months later. When I entered into the activities of the Coho development committee, bringing my suggestion for research about their start-up process, the committee considered my proposal carefully. There was a three meeting span when issues were negotiated, particularly the concern that the research might be a distraction. An overall workplan was considered, revised and subsequently approved. The plan included mention of further areas for negotiation, such as determining the interview questions, contributing to the analysis of the preliminary findings and determining how

we would work together to produce some presentation materials. The development committee valued having a mutually researched record to share and agreed to undertake this collaborative research. A liaison person was appointed as an ongoing means of managing the research process and my status as a participant/observer was confirmed. The masters' thesis I write is only one product of the research because we extended our research commitment by agreeing to work together to produce additional informational material for use in presentations.

2. Explore the experiences and expertise of those concerned.

The development committee drew upon the expertise of the participants and fostered a learning environment. A core group of participants remained engaged throughout the 30 month process, contributing individual research, communicating with the agencies they represented, and acting to help progress towards mutually defined and emerging goals. My request to join in as an observer/participant was agreed to because additional learning and the action goal of producing useful presentation materials were congruent with the culture of this group. Although most of the participants were volunteers, they boasted professional credentials and a wide range of experience in the field of health and social service. In addition, most were long term residents with deep roots in the community. Most were women, many were mothers. Most also shared a common and current experience of governing a nonprofit agency, and thus were aware of the political environment and social justice issues. Their shared vision clearly indicates their belief that their activities in nonprofit agencies constitute health promotion. The Vision Statement they developed says

We are guided by a vision of healthy communities.
We will provide a continuum of services and resources for children, youth and families to promote healthy communities.

3. Devise, revisit, and reinvent principles

When the research was being contemplated, the committee and I agreed to two principles: first, that we would have a co-operative approach to the various aspects of the research and second, that we understood that the research role I undertake is not only for my personal educational purposes, but also my contribution as a member of the community who cares and wants to help. The first principle was implemented in various activities. The liaison and I, for example, met to discuss questions for thesis research interviews and the committee was given an opportunity to review and refine the questions. Interviewees read and indicated acceptance of the transcripts. Interviewees also attended a presentation of the findings and shared their reactions. As for the second principle, my status as a participant / observer was initially confirmed with an emphasis on the 'observer' role but the emphasis changed to 'participant' as the committee asked for my input during consensus-building discussions and for help to retrieve archival information or to assist at special events. These requests appear to be a reinvention of the second principle as the committee became increasingly willing to determine the kinds of help they needed.

4. Develop decision-making procedures.

There were different types of decisions needed in the research. The development committee and I took responsibility and ownership for those decisions that affected the committee's work and priorities. The University's thesis committee and I were

responsible for the integrity and completion of the thesis itself, which is a public document that must meet particular standards. Both groups agreed to a workplan, the areas of primary responsibility, and a process of negotiation in case of disputes. The appointment of a research liaison by the development committee was a precautionary measure, instituted to ensure that the research was not a serious distraction but rather an aid to the development of the co-op. For example, the liaison and I piloted the interview, the liaison was able to report a positive experience, and the development committee decided to proceed. If the pilot interview had not been satisfactory, the interviews would have become an issue to revisit. The thesis committee, however, decided that the sample of persons to interview would include those who stayed with the development committee and those who left. This decision was meant to ensure that a wide range of viewpoints would be heard.

The workplan established an approach for each stage. I provided occasional updates about the progress of the research and individual participants were free to talk to me. The Coho development committee specifically developed norms for good communication practices inside and outside the committee meetings. I was clearly included, specifically because I was learning a great deal about hidden tensions and troubling issues.

Meetings with the thesis supervisor and committee were held to assess the rigor of the methods used. Both committees had to approve the ethics of the research procedures, including the letter of informed consent and the guarantees of confidentiality. Included in the Appendix B are the Letter of Introduction and Informed Consent, and the Certificate of Approval from the University of Victoria.

5. Negotiate resources, access and allies.

My permission to participate as a researcher was certainly helped by the fact that I knew and had worked with most of the people involved. Someone who knew me well volunteered to be the research liaison, but everyone co-operated in a spirit of good will and support. There was also some negotiation with the university through the ethical review process. As a result, I have the privilege of contributing not only my time and effort, but also the contributions of the Supervisor, other thesis committee members, library and other assets.

6. Design research procedures.

A case study is used when the research wants to understand the "how" and "why" of a situation. (Yin, 1994) The scope of a case study is quite wide – a contemporary phenomenon within its real-life context – and relies on multiple sources of evidence with data needing to converge in a triangulating fashion. Gillham (2000) emphasizes the importance of evidence in case study research. I planned to use a variety of data sources to ensure a rich description. Although the research is initially influenced by particular concepts and propositions, a detailed case study may lead to new ideas or a collective challenge and revision of earlier understandings. The case may be examined in terms of 'issues' raised by the literature, but I was also interested in examining the Coho development committee's perspective, using their language and accurately reflecting their meanings. To ensure that important information relevant to wider studies of the co-op movement was included in the thesis, the examination and the development of this case

study was also guided by a template for case studies of co-ops used at the BC Institute for Co-op Studies. (Appendix C)

7. Gather and inspect data.

Three methods of collecting information from various sources were used in this case study: participant observation, analysis of documents, and audiotaped interviews of participants.

Participant observation is the most direct and personally involving activity. Observation helped me absorb the culture and get to know everyone involved. For thirty months I kept a research log, a record of my observations, reflections and provisional explanations, email communications, accounts of dialogues with others in the community, and so forth. The log is more than a set of rough notes: it also provides what Guba and Lincoln (1985) call the 'audit trail' -- something that an 'auditor' could follow to understand the research narrative. Writing about the research process helps make the 'chain of evidence' clear. (Yin, 1994; Gillham, 2000) This chain of evidence will help the reader follow the analyses and debate whether or not they are convincing.

Jorgensen argues that there are seven features of participant observation: a special interest in human meaning and interaction from the insiders' viewpoint; location in the world of everyday life; a form of theory and theorizing stressing interpretation and understanding; a logic and process of inquiry that is open-ended and flexible, requiring constant redefinition of what is problematic; an in-depth, qualitative, case study approach and design; the performance of a participant role that involves establishing and maintaining relationships; and the use of direct observation along with other methods of

gathering information. (Jorgensen, 1989, p. 13-14) All these features seemed to fit this situation exactly and may explain why my role and activities were readily accepted by the Coho development committee.

The documentation of the entire process created by the participants was an important source of information and includes records of meetings, memoranda, progress reports, public announcements, photos and similar material relevant to the activities of the group. I gathered documents starting with meetings in the Fall of 2000 and continued until shortly after the legal formation of the Coho Co-op on April 7, 2003.

Transcripts of audiotaped interviews were another source of data. I interviewed seventeen representatives and supporters of the agencies who became members and four participants who left the process. The criteria for sampling was participation in two or more meetings, and a large majority of those eligible were contacted, by telephone or in person, for an interview. Two participants initially declined to be interviewed, but later changed their minds.

Table 1. Participants interviewed for case study, with descriptors to indicate how they are stakeholders.

Personal data: gender, parent status if known	*Coho resident or other*	*Connections*
Female, parent	Coho	Employee of the family resource society, volunteer representative of hospice
Male, parent	Coho	Volunteer co-op facilitator
Female	Coho	Volunteer for Seniors' programs, director of crisis centre society
Female	Coho	Former employee of community school, author of neighbourhood house feasibility study, volunteer representative of community school
Female, youth	Coho	Volunteer for youth activities
Female	Coho	Employee of the community school society, volunteer for transition house society
Female, parent	Coho	Employee of community school
Female	Coho	Employee of child welfare authority
Female, parent	city	Facilitator for development, hired by the Foundation
Female, parent	Coho	Employee of out-of-school care society, former volunteer director of family resource society
Female, parent	Coho	Employee of the family resource society, volunteer rep. of out-of-school care society
Female, parent	Coho	Employee of the family resource society, volunteer for community school society
Female, parent	Coho	Independent childcare provider, volunteer representative of transition house society
Female, parent	Coho	Volunteer rep. of family resource society
Female, parent	Coho	Volunteer rep. of co-op preschool, volunteer director family resource society
Female	Coho	Volunteer director of family resource society
Female, grandparent	Coho	Municipal politician, former chair of social planning council
Female, parent	Coho	Works with children with disabilities, representative of 'community living' society
Female	city	Nurse, employee of health authority
Female	city	Executive Director of Foundation
Female, parent	Coho	Researcher, former employee of family resource society, former director of co-op preschool and family resource society

The interviews were conducted in a location of the interviewee's choosing and took about an hour. The key interview questions were circulated, accepted and piloted before the interviews took place. The questions were:

- Describe the beginnings of your involvement with the Coho development committee.
- What was your contribution to the work of the committee?
- How did the idea of a co-operative model of governance develop?
- What decisions did the group make about the co-op's "rules of association"?
- How will the co-op foster inclusiveness, growth and adaptability?
- What helped the development process?
- What hindered the development process?
- What changes face the agency you represent as a result of the work of this committee?
- What was your personal experience working in this committee?

These questions were intended to uncover the personal interests and experiences of the participants, as well as the nonprofit priorities that shaped the decisions made.

Kvale (1996) describes aspects of qualitative interviews that will provide descriptions and help interpret the meanings of interviewee words and actions. The interviewer records the words and interprets the meaning of what is said as well as how it is said. The nature of the interview is, hopefully, sensitive to interpersonal exchange and a positive experience for the interviewee. The questions were intended to obtain open descriptions about specific situations. Kvale recommends an openness to new and unexpected phenomena and an acceptance that interviewee statements can be

contradictory or that interviewees can learn and change their minds. The interview was focused on particular themes as reflected in the key questions. A more detailed interview guide, developed by myself and both the development and thesis committees, suggested possible follow-up questions to bring out details, clarify the interviewer's interpretations or broaden the scope of the response. The interview was intended to be neither entirely un-directed nor structured with standardized questions.

8. Analyze data and debate interpretation.

"The purpose of analysis is to faithfully reflect in summary and organized form what you have found" (Gillham, 2000. p.25). To begin with, the material from observations, the documents, and the transcriptions of the interviews was organized. An initial step involved writing 'the story' using the BC Institute for Co-operative Studies' case study template. To understand the experience of others, as well as my reactions, I tried to stay open and intimate with all text while engaging in an iterative process of coding and refining the coding of the data. Coding is the part of analysis that involves naming and categorizing phenomena through close examination of the data. The analysis includes sorting, sifting, constructing and reconstructing the data from the various sources. Through 'triangulation' of these various sets of data, it was possible to see convergences constituting patterns or themes.

The analysis was influenced by concepts that would help me think about similarities and differences, test my assumptions, and identify themes. Concepts such as 'health promotion', 'social capital' and 'co-operative governance' seemed relevant and helpful. In analysis, it is possible to entertain a few propositions, but one must be ready to

test them against the themes arising from the data. For example, I heard a specific concern for more equality for nonprofit agencies and realized the proposition that sharing power among stakeholders had a great deal to do with the choice of a co-operative as a form of governance. On the other hand, the proposition that a co-op structure is able to reflect the complexity of the context for voluntary agencies was not strongly supported by the evidence. Indeed, it appears that the choice of a co-op reflects the commonality of certain stakeholders within a complex world.

A 'semiotic square' technique described by Ristock and Pennell (1996) was used in several instances to look more deeply into a concept. It increases the possibility of "disrupting the usual binary (either/or) oppositions; this helps to 'bridge the gaps' between people from different positions" (p. 80). The semiotic square helped to examine a coded category or proposition in terms of a key starting position, then posits its contrary, its contradiction and its implication. The responses indicating why a co-op structure was chosen, for example, were varied. Some respondents mentioned that it was a good fit, friendly, reflecting values, and providing a formal and equitable tie. To the contrary, other respondents mentioned money, a desire to save or redistribute money, and a belief that only an innovative solution would satisfy funders. The contradiction is that both reasons were involved, while the implication is that the participants are looking for shared values and shared resources. The use of a semiotic square enabled the preservation of various viewpoints, and the contradictions contributed to a deeper understanding of the diversity of the participants' experiences and the relationship between them.

An important feature of the analysis, drawn from community action research, is the ongoing opportunity for participants to comment upon any aspect of the research

through email, by telephone or in person. Each interviewee was given a transcript of the interview to read and correct. Two workshops were organized for the participants to hear the preliminary findings, and to further examine and interpret these findings together. Workshop participants felt free to emphasize findings they strongly supported and those they questioned. The response of the participants was positive and the findings were generally accepted as accurate, thorough, and trustworthy.

9. Broadcast results to engage multiple audiences.

The first audience was the committee itself, as it joined in the group analysis mentioned above. In the future, the ongoing acceptance and use of this research will be the best test of its trustworthiness. There are multiple audiences interested in hearing the results. The co-op members expect to be responsible for explaining, to agency members and to the public, the history of and the reasons for the formation of the Coho Co-op. Materials for their audiences will be developed co-operatively, likely through the efforts of the communication committee, and may make extensive use of the thesis. Another audience is the University and the academy, for whom the writing of this thesis and follow-up articles and papers will be appropriate. My first public presentation of a paper co-authored by my thesis supervisor, at an academic conference, was attended by two Coho development committee participants. Their presence and positive reaction not only demonstrated support for me and for the findings, but also acted to foster community ownership of the research.

10. Experiment with actions.

The Coho development committee was successful in forming a legal entity in Spring 2003. The Coho Co-op expects to carry on with activities that will see the completion of the co-location project and the evolution of its co-operative governance. Other actions resulting from this development include changes in individual perceptions, in personal and inter-agency relationships, and in health and social services policies and practices. The research is contributing to these actions because understanding and communication are part of activism. Members plan to broadcast and disseminate information about what has happened, what has been learned, and the implications of the findings.

This research will inform nonprofit societies and other organizations about some of the possibilities and tensions associated with the co-op model and about features of the revised legislation. The information from this case study may be included in a wider study of co-operatives in BC. Policy makers may find the information valuable as government and the social economy contemplate new ways to deliver health and social services.

Ethical considerations and limitations of the methodology

The values of community action research helped guide my thinking about ethics. Those involved in the formation of the Coho Co-op shared the values of social justice, agency, community connectedness, and critical curiosity (Reitsma-Street, 2002). We were all 'insiders' to a certain degree. I interacted with people under the ordinary conditions of their daily lives and my interest was part of my life and work in this

community. I had developed varying degrees of trust and engagement with many of the people involved at both levels of the development process, which helped me negotiate my role as a participant / observer. There were benefits to having an 'insider' doing the data collection. My previous experiences helped me connect with those who had left the process. My presence at Salmon district meetings, as a Coho researcher, was readily accepted. This situation reveals a limitation of the methodology. A researcher's previous relationships within a community will have an impact on the study, perhaps as much as a lack of a relationship would, and this impact is difficult to assess.

I tried to be sensitive to possible perceptions of a build-up of power. "The participant observer should be alert to the possible consequences of politics and stratification within human settings and should be prepared to adjust strategies" (Jorgensen, 1989 p. 45). I was careful to contribute only a little during the meetings and I said several times that if anyone thought I was overstepping, I would appreciate hearing that feedback. Participants may have felt varying levels of critical curiosity and may have experienced tensions over the nature of the proposed questions, the characteristics of the interview, or the revealing of negative as well as positive aspects of the process. Trust in the research process developed over time, starting with taking the time to negotiate, welcoming discussion about any aspect of the research, and continuing by being clear about my role and activities as a researcher.

Group consent was recorded in the minutes of the Coho development committee and committee work was all based on voluntary participation, unpaid for the majority of participants. Each interview participant was asked for informed consent on a form that clearly stated the purpose, parameters and voluntariness of her/his participation, and the

option to withdraw at any time. (Included in Appendix B) Their signed informed consent forms are being kept secure and separate from the data and their confidentiality has been preserved despite the fact that this has been a fairly public process. The University of Victoria Tri-Council Review determined that the participants were at minimal risk.

The caution with which my entry into the process was negotiated relaxed over time. Several respondents made comments that indicated that their familiarity with me contributed to a more open interview. One person said the research *"started out as a favour to you and ended up being a favour to us"*.

The findings were validated internally, by the participants, during the research period. When I reported the preliminary findings, most were readily accepted but one was challenged. I had developed an analysis of one agency's participation that was somewhat critical. While not contradicting the data that demonstrated a different attitude and level of participation on the part of that one agency's representatives, several respondents earnestly re-framed the tensions they had experienced in terms of a culture clash that those representatives were struggling to reconcile. Some concern was expressed that without such a framing, my analysis would damage the new relationships being formed. Overall, however, I think it is likely that another researcher would have reported the case very similarly.

There remains the question of what external assessments of validity might be available. In health promotion, the standards and methods best suited for examining and comparing community-based health promotion activity should be based upon one or more determinants of health, with values and standards determined by the stakeholders (Judd, Frankish and Moulton, 2001). Multisectoral engagement, community participation

and empowerment are considered determinants of health. While this thesis research is not an evaluation, evidence of the multisectoral nature of the development of the co-op, the involvement of the participants in the research process, and some sharing of power are all features that contribute to the believability of findings, especially with respect to theories of health promotion. Other groups attempting a similar development, if they chose to engage in similar research, could also share their varied experiences. It is not a question of building up an inarguable mass of similar experiences. Rather, by sifting through the mixed fortunes of similar activities, a researcher can attempt to discover those contexts that have contributed to success from those that have contributed to failure. (Pawson, 2002) The use of this study in such a synthesis may constitute a contribution to knowledge about what works, for whom, in what context.

CHAPTER FOUR

HOW THE COHO CO-OPERATIVE WAS DEVELOPED

Introduction

My town, which I have named Coho for the purposes of this study, lies in a semi-rural area, about a one hour commute from a sizeable city. The resource industries of logging and fishing used to be the foundation of the area's economy, but now many residents commute to the city to work. In general, the economic situation in this area is not promising. According to 1996 census information, 68% of the 1996 population worked and 85% of those who were employed worked in the service industry. Many in the service industry only work part time, especially women. In 1996 there were 3435 families here, and 650 of those families were considered 'poor' by Stats Canada (Dunbar, 2000). Coho is predominantly white, but includes an aboriginal community with two small reserves. Coho recently celebrated 150 years of harmonious co-existence between aboriginal peoples and immigrants. The community has been proud of its level of volunteer activity and a strong sense of community has been maintained.

During the 1980s and early 90s a number of voluntary nonprofit agencies were formed to provide health and social services in Coho. They include a parent-run co-op preschool, a family resource society, a crisis centre society, a women's transition house society, a community school society with an employment-finding services component, a food bank, a hospice organization, an out-of-school childcare society, and a 'community living' society that operates programs for children and adults with disabilities. Other community endeavours have also used a voluntary nonprofit structure to achieve their

goals: low income housing and seniors' housing, organized sports, park facilities, a community hall, a museum, a fish hatchery, and others.

The provincial government, in the early 80's, increased 'contracting out' health and social services as a way to reduce the number of people on the government's direct payroll. (Reckart, 1993). Since then the voluntary nonprofit sector has become an important source of employment. Economic sustainability is an important issue for nonprofits, just as in any business, and a mixture of funding strategies are used. Some of the organizations described above provide services under contract to government and have benefited from the stability that a reliable cash flow can provide. Some offer child-centred programs for families who can afford fees. Others have struggled to operate with variable resources, including funding based on the participation of subsidized individuals. Yet others rely entirely upon donations. Providing services to those who cannot pay is always a struggle. Coho's population is steadily growing, attracted by affordable housing and recent improvements to schools and recreational facilities. Demand for services is also growing.

Over the years surveys have been done in this area to identify the service needs of the community. For example, in a 1991 Women's Needs Assessment sponsored by the local Chamber of Commerce, an important finding was the need for improved recreational facilities, specifically a pool. By 1998 the pool was built. In 1994 the provincial child welfare authority sponsored a study which recommended, among other things, that "serious consideration should be given to 'decentralizing' service delivery and to providing services in the environment of the consumer, whenever possible. The service provided should, as closely as possible, reflect the needs of the consumer, as

defined by the consumer and the community" (Cormie, 1994 p.17). The regional health authority continued this 'tradition' of studies, in 2000, by providing funding to the family resource society for a feasibility study with regard to an expanded 'neighbourhood house' facility. The person hired to conduct the study was very well known in the community and she was able to contact over 224 individuals and 64 groups to provide a thorough overview of the community's thoughts on the subject (Dunbar, 2000). The study pointed out that the community is very family oriented, with 28% of the population under the age of nineteen, while only 11% are seniors. The population grew 19.5% between 1991 and 1996 and this trend is continuing. The study mentioned that our community contains 460 lone parent families and about 60 young people are identified as being seriously at risk. We also know of 23 families who have children with special needs who require aides in the school system or in the home.

The top four needs identified in the neighbourhood house feasibility study were a youth centre, support for at risk young lone parents, alcohol and drug counselling, and an interagency service centre 'under one roof". Most of the participants interviewed for this research in 2002 mentioned the impact of the feasibility study. It spoke in visionary terms and made the recommendation about forming a health and social service co-operative, pointing out the new provisions in the *Co-operative Associations Act* that would be of assistance when formalizing a 'working together' arrangement for agencies, municipalities, and government departments. The study also emphasized the need for a more understandable and accessible continuum of services, with less 'running around' for the caregivers and children. The feasibility study recommended that community nonprofits respond to community concerns, political will and funding opportunities by

working together to develop and operate an interagency service centre which would embrace a continuum of care model.

In December 2000 a community based development committee was formed, consisting of representatives of various nonprofits and other interested persons, to proceed to the planning stage. As committee participants began their work, they took the opportunity to review their concerns and needs: appropriate, 'quality' space to operate existing programs; social services for youth; increased visibility and accessibility of services; changed relationships, as one participant said, to *"feel safe and equal, and have an equal relationship that could be embedded in some sort of structure"*; more learning about how to manage internal difficulties and commonly experienced challenges; sharing of resources to use existing funding most effectively. The need to diversify and expand financial resources was leading the nonprofits in the direction of co-operation. *"The money these days is given to groups of agencies before individual agencies"* confirmed another participant. These needs were strongly felt by many, particularly because the users of the various services expressed frustration at 'the run-around' to various locations and poor co-ordination of services.

Stages of development of the co-operative

It took 30 months of committee work to develop the co-operative. Several respondents interviewed during the thesis research used the term 'roller-coaster' to give a sense of the ups and downs they experienced during the development process. One described the process as being similar to the stages of human development, from a baby being nurtured, to a child being taught, to a teenager storming and developing

independence, to a co-operative adult who knows *"how to disagree without being disagreeable"*. I have chosen to describe this story in five stages, each about a half year long: the first winter, the first summer, the second winter, the second summer, and the third winter. Throughout the stages, a theme emerged: the conscious effort *"to act like the co-op we want to become"*. This theme will be explored in a subsequent part of this chapter.

Stage 1 Responding to charitable patronage (October 2000 – March 2001)

During the first winter a remarkable coalescence of nonprofit activism and charitable patronage arose. A number of the nonprofit agencies involved have a history of collaborative efforts, including social planning meetings and information-sharing events. The parent-run co-op preschool and the family resource society's preschool have a long-standing space-sharing arrangement and, more recently, the out-of-school-care society joined them. Not all past Coho nonprofit collaborations were successful and competition for contracts had soured some inter-agency relations. The family resource society's experiences of failure and success provided some of the data for a local study into collaboration between agencies in times of scarce resources (Mullett, Jung, and Hills, 2002). The lessons they learned sharpened their attention to good collaborative practice and influenced their decision to consult widely in the community through the neighbourhood house feasibility study. Their regional connections led to them hearing about the Foundation's first agency consultation and attending it to put forward the case for a multipurpose building in Coho.

The community school society also had a history of collaborative undertakings and, during the same Fall as the feasibility study (2000), sponsored a Volunteer Connections conference, with funding from the Voluntary Sector Initiative of the Federal government. This conference was well attended by voluntary agencies in the community and identified several areas of mutual concern. One attendee said *"I think, in coming together to identify those needs, they realized that they had common ground in terms of their values and, I think, their desire to work for the community. And so, when they came together around this table they weren't strangers."*

After the family resource society shared its neighbourhood house feasibilty study at its Annual General Meeting, anyone interested was invited to continue to meet. The committee thus formed is named in this thesis as the Coho development committee. The participants agreed that it was important to try to include everyone who might be interested in the planning. Invitations attracted representatives from the family resource society, the transition house society, youth and adults connected with the employment agency and the community school society, the health authority, hospice, the aboriginal nation, seniors, the residents in need society, the child welfare authority, the economic security authority, the municipality, the volunteer-run restorative justice initiative, and two regional service providers offering addiction recovery programs. At this time I heard about the committee, as an employee of one of the agencies, but I was on an educational leave and did not participate.

Coho nonprofits were primarily concerned with finding a way for agencies of different size and strength to work together. One participant in the meetings, invited as a co-op advisor rather than as a representative of an organization, was promoting a co-op

structure from the first Coho meeting onward. The co-op model seemed to assure that no one partner would have excessive influence in decision making. Others did research during the next few months and support for this governance model continued.

An important feature of the planning process was participation of a new and wealthy partner, a Foundation with a mandate to promote the health and well-being of children and youth. The large school district region we live in, which I have named the Salmon district for the purposes of this study, is experiencing rapid population growth that is predicted to continue. This fact, brought to the attention of the Foundation by competing applications for building funds, spurred their decision to hire a facilitator to explore the possibilities for a collaborative project focused upon building an accessible and purpose-built facility and an improved continuum of services. At the early meetings convened by this facilitator, Coho participants pointed out that the Salmon district included three distinct areas of residential housing. The most densely populated area is a collection of suburban municipalities adjacent to a city. The town of Coho lies further away and a hamlet lies at the furthest end of the region.

A decision was made, by the Foundation and the various stakeholders throughout the district, to build or renovate in each residential area to show respect for the daily lives of the families using the services by reducing the distance and time needed to access those services. The decision did not come easily. The Foundation had received proposals from agencies in the area closer to the city and originally had thought of only one building in that area. Representatives from Coho agencies heard about the meeting by chance. A key participant remembers traveling to that meeting *"one dark and stormy*

winter night" feeling as if she was coming in from the margins and having to compete for consideration. An early highlight occurred when the Foundation agreed to build in Coho.

The Foundation, however, did not want to deal with three developments separately. A district-wide development group, which I have named the Salmon development group, was formed to encourage collaboration among all the stakeholders in the district. The task of representation was, therefore, doubled for many of the participants. As the winter ended the facilitator had presented a detailed proposal for three projects which was well received by the Foundation. The agencies were encouraged to continue and work on a Memorandum of Understanding was started.

> We have to remember the enormity of the financial commitment we are asking them to make. This time they are asking us to take some fairly natural "next steps", they are making financial contributions to cover those steps, they are asking us to formalize ourselves (encouraging us to move forward), and they are giving us a memo of understanding. I think this is reasonable, even if it is frustrating.
>
> (Coho participant email to all, March 22, 2001)

Stage 2 Learning about each other and formalizing a collaborative relationship (April 2001 – October 2001)

The first spring and summer was a time of learning about each other and formalizing collaborative relationships at two levels; within the local Coho development committee and also within the Salmon development group. Several interviewees remarked upon the inspiring, knowledgeable cast of Coho characters involved.
In addition to the participants interviewed (described in Table 1) others participated to varying degrees. An addictions recovery counsellor participated significantly during the middle of the process, but was not interviewed. The agency she represented became part of the health authority. Others participated briefly, connecting with the project on behalf

of the economic security ministry, the aboriginal community, the emergency services program, the food bank, and restorative justice. There was an expansion of participation during the process, as representatives from the out-of-school care society, the parent-run preschool (a co-operative) and the 'community living' society began to attend.

Locally, the Coho development committee experienced a very gradual process of formalizing representation and criteria for membership. The Coho development committee seemed to have a fluid membership, with no restrictions on the number of people from each organization, or on the participation of less formalized groups – such as the volunteers who were developing a restorative justice program. There was an attempt, in February 2001, to have each participating organization sign an Authorization of Participation form but this was not supported in the committee, which appeared to prefer a less formal approach. The 'everyone welcome' approach did not appeal to a few of the participants, who felt uncomfortable with one organization having a greater number of participants.

The Coho development committee experienced some attrition as various participants realized that co-op membership would be limited to charities and 'qualified donees', a Canadian Customs and Revenue Agency designation that includes government authorities. Some found that their interests were not sufficiently in keeping with the interests of the Foundation and, if they could not benefit from the building, found little reason to continue. Representatives of seniors, the crisis centre society, the food bank, the aboriginal nation, and the economic security authority stopped coming. It felt disappointing to quite a few participants that there was not a complete representation of all the voluntary helping efforts in our town. Some participants had originally envisioned

a centre offering a wide range of services for infants to seniors and that vision had been altered. The vision became a little more narrow, and the Coho development committee came to represent non-profit group childcare agencies, child and maternal health programs, community education, and 'family support' services – including the women's transition house. During the process of determining *"who's in and who's out"*, unhappiness found expression through complaining outside the meetings. Eventually the committee took a stand against this sort of activity, developing norms for conflict resolution and trying to create a safe environment for dissent within the meetings.

The Coho development committee met regularly to share what they had learned and to decide what else they needed to know. Although a co-op model of governance was accepted in principle early on, additional information about the legal, accounting and fundraising ramifications of this decision was sought. Information and opinions were circulated, usually by e-mail, to clarify details and prepare for meetings. In March 2001 the Foundation provided funding to a committee member with co-op facilitation experience to help with the formal creation of a co-op. The first draft of the 'rules of association' was reviewed in May 2001 by a sub-committee, then circulated for comment. The second draft was available in September 2001. Each reading of 'the rules' gave rise to questions that needed to be answered, and it was over two years later that the final draft was submitted for incorporation.

By July 2001 the Coho development committee had agreed to engage in a research project about the process of developing a co-operative of agencies. While most of the participants enjoyed an August break, I spent time with the chairperson assembling

documents accumulated thus far and learning about the process to that point, as well as writing a research proposal for the thesis committee.

Salmon development group meetings became an important forum for establishing the common vision of Coho's proposed ongoing collaborative relationship with the Foundation and neighbouring communities in the Salmon district. Participants had to learn how to work simultaneously at district and local levels. Meetings were being held twice a month locally and once a month as a district. Efforts were made to rotate Salmon development group meetings in each of the three communities. Coho nonprofits had little or no capacity to devote staff time to development work, so notably more volunteers were involved. New contacts and relationships began to be formed. Every Salmon development group meeting began with a circle of introductions and the records of the meetings reported those names and agency affiliations. The facilitator made extensive use of email communications and many participants did the same. Across the district, the sense of common purpose was particularly fostered during this stage by the collaborative development of the Vision Statement: *We are guided by a vision of healthy communities. We will provide a continuum of services and resources for children, youth and families to promote healthy communities.*

Impatience with the pace of development flared up in the Coho development committee – a regular participant wrote of her concern about the *"lack of forward motion"*. There was grumbling about revisiting everything mostly for the benefit of the other communities in the district, to help them get 'up to speed'. It was a challenge to expand Coho development committee work to fit with the Foundation's vision of a district-wide development group. Involvement at a district table demanded a lot of

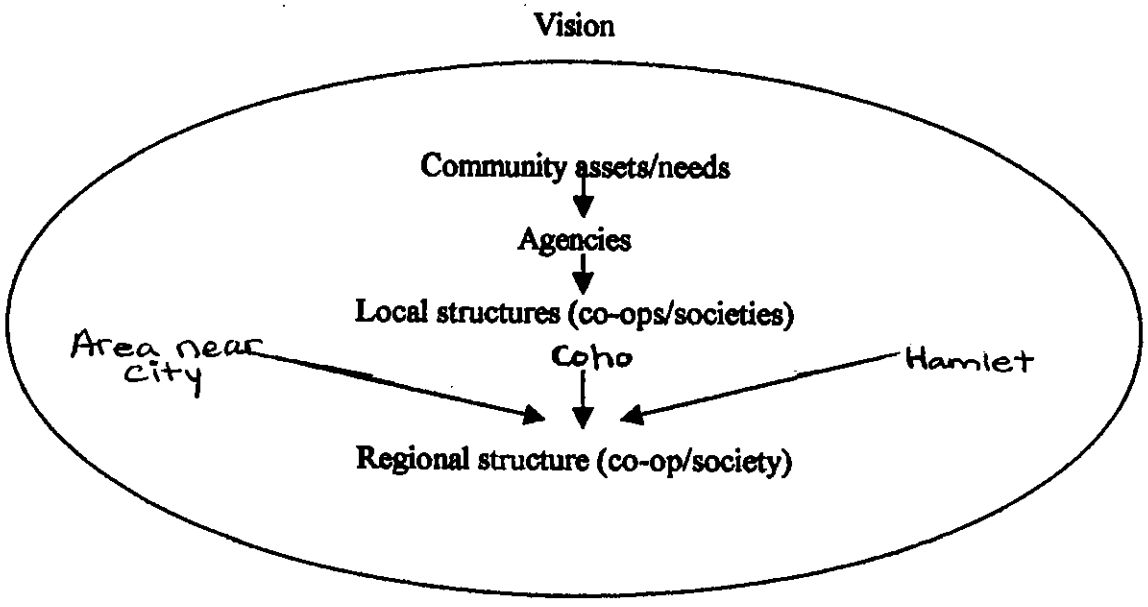
volunteer time and travel to communities outside Coho. The Coho development committee had to abandon a parochial viewpoint and accept that dealing with a large Foundation meant dealing on a district basis with many issues.

It took time for the Coho participants to understand the Foundation's parameters: their obligation to their donors to ensure that anything they do is particularly for children and youth, their insistence that their beneficiaries be legally recognized charities and their concerns that developments not become public knowledge before they were ready to make an announcement. As all the details of the relationship with the Foundation were addressed, if not entirely clarified, the trust and goodwill built to the point where the Foundation was ready to make a public announcement. The project was featured as a celebration of the 75th anniversary of the Foundation and its largest undertaking yet (*Times Colonist*, front page, July 13, 2001). The relief of becoming a publicly acknowledged partnership with an exciting project in mind was the highlight of the second stage of the Coho development process.

A Salmon development group meeting in September 2001 was the first big event after a summer hiatus. All the directors of all the agencies which had participated to that point were invited to hear presentations about the project. The goal of the meeting was to get the agencies to become formally involved by signing a Letter of Intent. The Foundation wanted this assurance before purchasing land. The Letter of Intent affirmed that agency directors endorsed the vision document, agreed to work together to develop three facilities, and intended to locate child, youth and family services and programs in them. Several Coho agencies signed immediately.

A commitment to a specific form of governance was not included, but a two tier structure of co-operatives was proposed by participants from Coho. The diagram for the model was drawn to emphasize the importance of the community level of the structure – community above, with the inter-community district structure in support.

Diagram 1 Proposed two-tier governance structure as presented in documents from September 2001



The goal of the two-tier model was to respect community differences, distinct geographic separateness, and agency autonomy while linking all the stakeholders within the Salmon district and speaking with one voice to the Foundation. However, at the September 2001 meeting, a representative of a large organization asked if the principle of 'one member, one vote' was truly intended? A strong affirmative reply was perceived by

the large organization as a problematic issue due to differing stakeholder concerns around power and risk-taking. Concerns about difficulties co-ops might experience with obtaining charitable status were also raised. These two issues, equitable membership and charitable status, surfaced at both levels of collaboration at this stage and came up again later. These issues will be explored further on in this thesis. The Coho development committee used their 'co-op connections' to help them debate and decide how to respond to these issues. What they learned did not change their preference for a co-operative governance structure but, at the Salmon district level, a choice of governance model was not resolved for another six months.

In October 2001 the Foundation made an offer to buy a parcel of land in Coho, which was accepted. It took another year to remove all the conditions (subject to sub-division, rezoning, and development permits) for the sale to be completed.

Stage 3 Experiencing contradictions (November 2001 – April 2002)

The second winter started off with a structural change, when the Coho development committee agreed to *start acting like the co-op they hoped to become.* At meetings in November and December, the committee rebuilt itself, clarifying roles according to the proposed Rules of Association and electing an interim executive. This co-op that was not yet a co-op took the time to revisit norms for co-operative behaviour and problem solving. A personal and 'agency news' check-in was added to the beginning of each meeting. The importance of open communication was stressed as the committee wanted to make meetings a safe place to express dissent. A specific review of decision

making affirmed that the committee intended to work towards consensus for making decisions. A bank account was opened and modest fundraising begun.

An important contradiction concerned the provincial government. Was the government supportive of nonprofits and co-ops or not? The Coho development committee had been encouraged by the Ministry for Communities, Volunteers and Co-operatives and asked for financial support. But this Ministry disappeared after the Provincial election in the Spring of 2001. On the one hand, the agencies were experiencing 'the big chill' of a new provincial government committed to restructuring and cutting public services while, on the other hand, the child welfare authority was asking to be included as a partner in this project. In the Fall of 2001, the provincial government undertook an extensive review to determine what core services government should provide and what might be provided in some other way. Impending financial cutbacks appeared to threaten the financial stability of several stakeholders. The out-of-school care society was negatively affected by the ending of a subsidy program for parents. The family resource society was served notice of the ending of a program that sustains the children's playroom as well as providing education, support and referral services for home-based child care providers. The community school was worried about losing funding. The Foundation acknowledged that sustainability is a troubling issue and that the development of a shared building and collaborative decision making, at both the local and district levels, was proceeding with more faith than certainty.

A child welfare representative from the Coho office attended only one early meeting of the Coho development committee. Much later, however, the regional level of the child welfare authority approached the Foundation, seeking to become a partner in

this development. It remained unclear how much of this change of heart was a result of imminent and drastic budget reductions and how much was due to a change of policy. The Salmon development group felt unready to embark on new ministry initiatives to provide a community-based way of dealing with child protection: participants doubted that the child welfare authority really understood what it means to be community-based. Nevertheless, an important turning point occurred in March 2002 when the Salmon development group agreed, by consensus, that they would accept the child welfare authority as a full partner. Perhaps the decision to include the child welfare authority as a member was inevitable since many nonprofits rely upon contracts funded by that ministry. The child welfare authority was able to provide some capital to build the extra space they would require, having justified the expense because they could demonstrate significant long-term savings.

The Coho development committee also experienced contradictions in its relations with the Foundation. On the one hand, the committee worked with optimism to get ready for the architect while, on the other hand, participants became pessimistic about their ability to communicate with the Foundation. Furthermore, building-related issues were discussed directly between the Foundation and the Coho development committee, while building inter-agency relationships and new governance structures involved communication at the Salmon district level.

The first big task for the building project was a functional analysis plan, clarifying the activities and services that would be offered in the building. One Coho participant stepped forward to collect the information from all of the agencies and pull it together in a document in time for the Foundation's year-end deadline. When the functional analysis

document was essentially complete, in January 2002, the Foundation abruptly announced that the size of the building was to be reduced by one-third because their construction cost estimates had risen. This news was a shock because the committee had worked diligently to reduce the wish list and to share space as much as possible, in order to fit the size stated all along in the planning (11,000 sq. ft.). The Coho development committee was dismayed by the lack of communication and working together to deal with this problem. They argued that the reduction in size would mean eliminating some programs, possibly some partners, and suggested that the community could find ways to reduce construction costs. Although the issue was resolved somewhat when the child welfare authority joined in, bringing construction capital, Coho's participants began reflecting upon the communication challenges they were experiencing and how to improve the situation.

Public communications were also an area of tension. The project was attracting interest, especially in co-operative circles. The chair of the Coho development committee spoke at the annual convention of the Canadian Co-operative Association of BC, which published an article about the emergent co-op in a Fall newsletter. It appears that the Co-op sector is very interested in new stakeholder co-ops that are forming, enabled by the revised provincial legislation. The Foundation was concerned because a final agreement about the governance model was not yet reached. In another example, the Coho committee, enthused by the process of functional program analysis and committed to being open and inclusive in their processes, planned a public forum. They realized that when the plan was complete, new partners coming in would have to fit into, rather than shape, the space. The Foundation had different concerns, worried about raising

expectations and suggested the public forum be cancelled. Although it went ahead, the event was recast as a 'public information night' and the format was casual, a stand-up affair with chart paper where people could write responses to set questions. There was a display showing the location to be developed and another about the vision and principles. There was no recruitment of new partners, although a few less formally organized groups, such as the 'home-schoolers' and youth, attended and expressed interest in collaboration.

At times key Coho development committee participants were becoming uncomfortable with communication tensions, questioning whether or not to continue, and worrying about earning 'black marks' for Coho by speaking up or not always doing what the Foundation wants. The Salmon development group had not yet formed a communications committee, although some Terms of Reference had been drafted. Coho participants were finding it hard to understand the Foundation's viewpoint, without having the experience of working together with Foundation representatives on local and district communication issues. One person from the Coho development committee was pleasantly surprised with her experience working with Foundation representatives on a land search committee. She spoke in meetings about her positive experience and encouraged Coho to call for more clarity and better communication, eventually volunteering for the Salmon communication committee.

The Foundation continued to pay the facilitator and funded a newsletter for all three communities in the Salmon district in order to improve internal communications about activities, specific developments, challenges being addressed, and next steps on several fronts.

Despite the contradictions, decisions began to be made. Even though the incorporating paperwork was not completed, the Coho development committee enthusiastically agreed upon a name for the co-operative. This decision was another highlight, helping them feel like a 'real co-op'. The thesis research I proposed to conduct received a Certificate of Approval from the University's Human Research Ethics Committee in February 2002. The architect for the Coho building was chosen. The committee met with the architect and was impressed by the extent to which their functional plan was reflected in the proposed design. The committee members were very interested in promoting an environmentally friendly design appropriate for the land, using non-toxic materials, and thinking in terms of efficient use of energy and ease of maintenance.

A disappointing turn of events occurred in April when the Salmon development group decided to pursue incorporation as a Society, rejecting the co-operative model of governance and the elegant two-tier co-op structure proposed the previous September. In the meeting record, it was stated that the 'society' model was tried and true, familiar, and expedient while the co-operative model represented innovation, doing something different. It was argued by those who preferred a society model that there was nothing that would prevent a society from behaving like a co-op, and using the co-operative principles. There was nothing that would stop a society from becoming a co-operative (or vice-versa) later on, if needed.

What was particularly tried and true about a society structure is its ability to achieve charitable status from the Canadian Customs and Revenue Agency. Several participants at that April meeting regretted abandoning the two-tier co-operative model,

but understood the concern about charitable status and were not willing to block the decision. The formation of a Salmon Society was agreed "with the proviso that regular assessment is built in, and that Coho's experience as a co-operative seeking charitable status from Revenue Canada be taken into account" (Record of meeting, April 3/02).

Stage 4 Rockin' and rollin' (May 2002 – October 2002)

The second summer was a 'rock and roll' time, an expression that implies an up-beat, fast-paced rhythm with complex harmonies that include dissonance. First, the Coho development committee got down to business at a day-long retreat. Several working committees were organized to take on upcoming tasks. The 'finance' committee presented its terms of reference and reported donations totaling $8,000. The 'structure' committee would continue to work towards incorporation. One meeting was devoted to a clause by clause review of 'the rules'. At another meeting two guests from the Canadian Co-operative Association – BC region, one a charity lawyer, discussed the draft governing documents and offered to help fine tune them. The guests were planning to write a position paper about the issue of co-ops and charitable status and Coho agreed to be their 'test case'.

The 'communication' committee worked on public relations, arranging for an article and photo in the local paper. The sponsorship of a cultural event earned some donations and provided an opportunity to publicize the emerging co-op. The building's potential neighbours were invited to an information night. The 'project management' committee worked on building-related details and submitted applications to the municipality for rezoning and sub-division. The 'people' committee was part of an effort

to communicate across the district, with four three-hour 'get togethers' held for directors and staff of agencies. Child welfare supervisors invited the Salmon development group to begin sending a representative to their weekly management team meetings. A huge summer picnic was held to celebrate progress.

The focus of the work of the Coho development committee was not entirely devoted to creating the co-op or the new building. Letters of support of the hamlet and for the transition house were written to accompany funding applications. Several participants were interested in reviving a community social planning body and began to plan for that.

Although the development work proceeded harmoniously, dissonances between regional and local service providers could be heard. One of the Coho agencies lost a school-district contract to a regional service provider. The school board's priority was to simplify contracting rather than allowing for a community based approach. The Coho transition house objected to a city-based agency proposal to deliver programs such as 'Children Who Witness Violence'. In the past such programs have been offered in the area closer to the city and Coho clients were expected to travel. The transition house society preferred to increase its capacity to deliver services in Coho.

The Coho development committee became increasingly appreciative of the Foundation's consistent respect for and support of community-based agencies. As the summer came to a close, they felt it was time to thank the Foundation and all contributed items 'from the heart' for a gift basket. The jams, wood carvings, knitting and hand-made dolls were modest thanks, but the Foundation directors appreciated the gesture.

This 'rock and roll' stage ended with a second retreat for the Coho development committee in October, 2002. Participants reviewed their norms and working committees, restating the tasks ahead. One discussion debated the nature of membership, influenced by a strong desire to ensure a voice for those the agencies serve. Another discussion was specifically about power, clarifying the differences, both in services and authorizations, that the stakeholders and their representatives experience. Many participants were connected with more than one agency and referred to *"wearing different hats"*. A *"duality of roles"* was a common experience, and one that the participants agreed to recognize and accept. One person made a comment that *"the co-op works like that exercise where every member holds threads to each other and if one moves, they all have to adjust"*.

Stage 5 Settling into a sustainable pace (November 2002 – April 2003)

The third winter of this development became a time of adjustment and settling into a sustainable pace. The Coho development committee decided to reduce meetings to once a month and to reduce their representation at Salmon development group meetings to two regular representatives. The development permit for the multipurpose building was approved by the municipality in December. The 'project development' committee attended to further details. The 'people' committee reached out to staff in particular, sharing the vision and asking about their concerns. The 'communications' committee reached out to nonprofit agency directors once more to increase participation at the district level and to garner support for the incorporation of the Salmon Society. The 'structure' committee had the proposed 'rules of association' reviewed by various

experts, and then submitted them to the Provincial Registrar. In February 2003 the Registrar returned the submission, recommending some minor alterations to remove redundant wording. This was done and the Coho Co-op was legally incorporated April 7, 2003.

As far as the thesis research, the preliminary findings were ready to present to the Coho development committee in April, following a winter of transcribing interviews and analyzing all the data. Although much of the data included information about the entire district's development, the interviews were conducted only with Coho development committee participants, including the facilitator hired by the Foundation and the Executive Director of the Foundation. The analysis was focused upon the local experience: what the participants contributed, how the idea of a co-operative developed, what helped or hindered the process, what changes occurred and their personal experience. At the conclusion of this fifth stage, the data collection ceased and the writing of the thesis began. Further work on presentation materials will follow in the near future.

The significance of *"Acting like the Co-op we want to become"*

Having described the five stages of the development of the Coho Co-operative within a two-tier region-wide community development project, the next section of this chapter analyses the actions of the Coho development committee as they put into practice various elements of the co-operative governance structure. The desire to begin acting like the co-op they wanted to become was first spoken in Coho development committee meetings at the start of the third stage of development, after a draft of 'the rules' had been circulated and reviewed. The details of the co-operative governance structure were then

sufficiently understood. Interviewees talked about establishing norms for behaving like a co-op when resolving conflicts, making decisions, and communicating with the community. They spoke about the emerging co-op's learning culture, and their personal experience of the helps and hindrances that affected its development. Drawing upon interviews, participant observation and documents, the following aspects of the theme *acting like the co-op we want to become* are presented: developing a learning culture; affirming the vision, values and principles; forming the rules of association; following the rules; developing norms for conflict resolution; working to achieve consensus in decision-making; and speaking with one voice in the community.

Developing a learning culture

"We have really developed a learning culture in the group and we see learning as essential to all the mandates of every group that's there" claimed one participant. Learning was the most frequently mentioned personal experience and *"Life-long learning"* was an expression used frequently during the development process. Learning about co-operatives was begun at the outset. The committee included knowledgeable people who knew that a co-operative was one possible governance model for co-location. An important source of information was a Coho resident with experience in establishing housing and worker co-ops. This person advised the committee about co-ops in a gentle way, describing it as *"sending out ideas and getting them back"*. This person was also learning about how the model would encompass a "stakeholder' membership. Teaching techniques included handouts, a video, and a discussion comparing three governance options. The early consensus was that everybody, for different reasons, felt that a co-

operative was the way to go. That initial solidarity had an impact on one participant; *"I remember coming away from the meeting thinking this is really powerful, you know, if it can pull us together now so quickly, it will serve us really well in the future."*

Subsequently, other participants did their own research and shared their findings. About half of the participants had previous experience in co-ops and were generally positive about the model. One person wrote a paper applying the co-op principles to the project and many people described learning about and valuing co-op principles. Another participant described growing in personal confidence and starting to think co-operatively in her personal life. One person mentioned drawing information from the Canadian Co-operative Association website. Participants debated the rules of association and became aware of the current issues related to co-operatives obtaining charitable status. Those who joined later on describe learning about co-ops through documents and by picking up co-operative practice in the meetings.

Participants learned about other stakeholders, the breadth of services offered, and the possibilities for sharing and improving practice. The prevalent attitude towards government agencies became more positive. The experience built interconnectivity that was important to the participants and, for many, of more immediate value than the legal connectivity of the co-operative. Nevertheless, participants learned a great deal about co-operatives; co-operative principles, membership responsibilities and legal aspects. They spoke of looking forward to learning more about co-operative multi-stakeholder practice.

The Foundation learned new respect for the community-based nonprofits and became more willing to acknowledge differences between communities, speaking of their intention to engage with other communities without preconceptions. The child welfare

authority gradually realized that this development signaled a change of practice that they wished to become part of, as evidenced by public praise from the Minister. Managers decided to include community representation at their meetings and, in various smaller ways, demonstrated a changing view of their role in service delivery.

To demonstrate their concern for learning, the Coho development committee organized Board, staff and citizen information-sharing and consultation events. They also embraced a participatory style of research. Many of the interviews included comments about enjoying the opportunities for reflection and appreciating the contribution the research is making. They expect that the findings will help with future teaching and learning about the Coho Co-op.

Learning is an intensely personal experience. Respondents mentioned increased knowledge about each other and the meaningful relationships that developed within the committee. Most participants found the experience energizing, friendly, and supportive. *"I've had a great time and I especially value the friendships and the people, and it's one of the only committees that I've sat on in a long time that I get energy from."* Although most participants were very optimistic about the future, a few felt uncomfortable, frustrated, marginalized, and not optimistic about the future. The wide range of personal experiences was described by one respondent as *"an emotional roller-coaster"*. Overall, participation was less affected by negative personal experiences than one might think. Several agencies were able to pass on the representative role to others in their organization, which helped avoid 'burn-out'. Comments from interviewees who were no longer involved indicate that they wish the co-op well and are leaving the door open for future collaboration.

Affirming the vision, values and principles

The importance of principles was featured in the Coho development process. Respondents referred to the unifying influence of stating and revisiting the Coho Co-op's principles and values, creating a strong foundation that will help them work together. Principles such as inclusion, diversity, continuum of services, client perspective, communication, collaboration, innovation, promotion, continuous learning and evaluation and mutual support, were enunciated and explored in the proposal to the Foundation (Jan 2001), the Vision document (May 2001) and a up-dating Report to Boards (Sept. 2001). The above mentioned principles were revisited often throughout the development process. Inclusion and diversity were discussed, raised as a serious concern about the lack of participation by the aboriginal community and youth. The ideal of a continuum of services was reviewed when it was realized that the Foundation providing the capital funding for the multipurpose building was constrained by its mandate to limit the extent of the continuum of services to those for children, youth and families. Services specifically for seniors, for example, could not be housed in their building. The ideal was clarified to reflect this reality. Improved communication was embraced through expressions such as *"having an equal say"* and *" ensuring that everyone is heard"*. The value of continuous learning led to a ready acceptance of the value of this research. In these and many other ways, the vision, values and principles found expression in the words and activities of the participants.

Forming the rules of association

Determining 'the rules' was an ongoing process requiring debate and decision making by the Coho development committee. In general, the prevalent position was that the process was thorough and demonstrated how the committee made decisions. A working group created a draft that was distributed widely. Everybody had lots of time to think about it and make comments and suggestions. A meeting was devoted to a clause by clause examination of a revised draft. Experts were consulted about wording that might help the Coho Co-op obtain charitable status and further revisions were made. Finally the decision was made to send the documents to the provincial registrar.

There were, however, concerns and other views, reflected in interviewee comments about people who did not have email, nobody reading the drafts, or finding the topic uninteresting. Within the working group devising 'the rules', a minority position developed around some of the elements, such as the level of detail advisable and the need for certain sections that seemed unlikely to ever be relevant. Nonprofit representatives appear to be familiar with their society's own rules, and a natural tendency was to compare existing society's documents with the proposed Co-op rules. The Coho Co-op's rules are lengthy and expressed in language similar to the legislation. Without gaining unanimous agreement on every point, the Coho development committee was able to establish a consensus that 'the rules' reflected their intentions and would be acceptable to the provincial Registrar.

Following the rules of association

In the beginning there was a committee structure with a chairperson calling meetings and proposing the agenda. Participants made decisions by building consensus. After the second draft of 'the rules' was distributed in the Fall of 2001, the Coho development committee used the structure described therein to establish an interim executive, thus distributing power and responsibilities in the way it was planned to continue. This was an important step because the committee had come to an impasse. After a year, a key participant was very dissatisfied and reluctant to resume meetings after the August break. Others took the step of calling a meeting and addressing the problem with this reorganization. The establishment of an interim executive was accomplished by voting, as provided for in the rules of association. This marked the first time, and one of the few times, that voting instead of consensus building was used to make a decision. This was done respectfully and the reluctant participant continued attending until the summer of '02, when another representative from that participants' nonprofit began to attend.

Developing norms for conflict resolution

"One of the most important norms we came up with was that we were going to declare conflict" stated one respondent in an interview. This quotation speaks to the conflicts that arose during the stormy time when *"who's in and who's out"* was becoming evident. The Coho development committee became concerned that conflicts and issues were being discussed in parking lots and clandestine meetings. It became important to establish a more preventive strategy for conflict resolution, developing norms and formal

processes that aimed to promote *"a safe place where someone can say what they are upset about and everybody works on how that can be resolved"*. The idea was to encourage open discussion of conflicts and issues by asserting an expectation that members will deal with each other respectfully and supportively. Supportive strategies included taking the time for a 'check-in' at the beginning and a 'check-out' at the end of each meeting, celebrating development milestones together, and acknowledging personal needs and expectations. Such practices require co-operative interpersonal skills and robust agency support. In the future, orientation for new members would be enhanced by a review of conflict resolution norms and by making a point of encouraging stakeholders to support their representatives. It should be acknowledged that a person's experience may well be related to her or his ability to trust and to speak concerns despite the pressure to build consensus. In addition, it will be important for the co-op to acknowledge, encourage and support potential members that may be struggling to achieve or maintain the capacity needed to participate.

In the event that a conflict arises that cannot be resolved, 'the rules' contain a section, derived from the legislation, which outlines a formal conflict resolution process involving an arbitration committee. Respondents acknowledged that this process exists, but all hoped to never have to use it. They expect that an over-arching 'concern for community' will help members reconcile their differences.

Working to achieve consensus in decision-making

A co-op makes decisions democratically. The development committee's preferred

strategy is to build consensus when making decisions, but voting provides a *"back-up plan"* if consensus cannot be achieved. During the many months of developing the co-op, a key participant was able to enunciate the essential features of the process of building consensus and was asked to repeat the information several times. Consensus is seen as a way to ensure that all voices are heard and as a way to build history together and develop trust. Consensus building is a demanding democratic process with the potential to provide real power to a dissenting voice by permitting a decision to be reviewed, discussed more, or blocked. A few interviewees indicated that a voting process was more familiar and acceptable, particularly as it allowed dissent to be registered but did not allow minority dissent to stop a decision from being made. One participant thought that using consensus to shape decisions stifled dissent. *"So, even if you don't agree with something, but you can see that most people do, then you have to vote to go along with it."* Always achieving consensus was accepted by most participants as a worthy ideal but, by retaining the voting process in the Coho Co-op's rules of association, dissent becomes a trigger for further reflective consideration of contentious issues in advance of making decisions rather than a means to prevent a decision. A few interviewees suggested that their concerns, expressed during the discussion, were lost as consensus was reached. It appears that records of discussions should include troubling issues and concerns, to acknowledge and learn from while still moving forward.

Speaking with one voice in the community

Part of treating each other with respect is treating the collective with respect. Participants spoke not only of wanting meetings to be a safe place to talk, but also of

wanting to take great care with public communications. It was generally thought that however decisions are made, it is the decisions that are important for the community to hear, not necessarily the debates that preceded them. *"There's strength in unity."* For a minority, however, this norm became *"a gag, a muzzle"*. Establishing *"one voice"* for the collective seemed to become much easier after the developing co-op chose its name. The identification of the various service providers as a unified and significant entity in community life has brought the scale and scope of their endeavours to the attention of the public, attracted donations, and bolstered the confidence of the participants.

The development of the Coho Co-op took longer than expected, despite the favourable confluence of financial resources, political will, and effective community-based activity. It was an ambitious undertaking involving scores of people across several communities, representing stakeholders from the public and voluntary sectors. The time was first taken to learn what a co-op believes, to examine the values of the nonprofits and government authorities involved, and to agree that the stakeholders share co-operative principles. Thereupon, the Coho development process moved on; to clarify the procedural details, to develop norms for co-operative practice, and to act together as it was planned to continue. The culture of the co-op evolved as a supportive environment for learning and mutual support. By the time the Coho Co-op was formally incorporated, the stakeholders were convinced that they had taken an innovative step towards better service delivery.

Founding members, their purposes and responsibilities

Previous sections of this chapter presented a chronological account of the stages of development and the theme of "acting like the co-op we want to become". This third section will clarify what was created: the founding members, their purposes and responsibilities, using the seven Co-operative principles as an organizing format.

The Coho Co-op was formally incorporated April 7, 2003. The Coho Co-op's seven founding members are a family resource society, a parent-run co-op preschool, an out-of-school childcare society, an 'options for community living' society, a women's transition house, the provincial child welfare authority, and a community school society. The provincial health authority's membership was pending, as it appeared to be taking extra time to obtain signatures at a higher level in their hierarchy.

The purposes of the Coho Co-operative are stated in the rules of association:

> a) To develop and operate a child, youth and family service centre, from which health, education, poverty relief and other charitable services can be delivered to the people of the Coho region.
>
> b) To improve the health and welfare of the people of the region through the provision of a range of health and social services for all ages, from prenatal care to rehabilitation programs for seniors.
>
> c) To advance education in the region through the provision of youth and adult educational workshops, training sessions and counselling.
>
> d) To relieve poverty in the region through the operation of a community kitchen, a clothing exchange, programs for persons with disabilities, and other similar charitable services.
>
> e) To research, develop and deliver a continuum of community-based, no- or low-cost health and social services to meet community need, to benefit the public of all ages, to improve the welfare of the region and to ensure innovation and efficiency in the use of charitable resources.

f) To provide members with management, administrative and technical services, fundraising and human resource expertise and consultative support, including legal and financial services.

Early on in the development process, one participant prepared a handout reviewing the Principles of the International Co-operative Alliance (MacPherson, 1996) and comparing them with the values and intentions of the Coho development committee. It seems appropriate to use the same Principles as a framework for considering what the committee has created.

1. Ensure Voluntary and Open Membership

This first Principle is elaborated in the ICA Statement on the Co-operative Identity (referred to hereafter as the ICA Statement):

> Co-operatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political, or religious discrimination. (Ibid. p. 15).

The specific reference to co-ops being open to those "able to use their services" implies that "there may be understandable and acceptable reasons why a co-operative may impose a limit on membership" (Ibid. p. 15)

For the Coho Co-op, the criteria for membership are

- each member agency must be providing publicly accessible health and social services,
- each member agency must be willing (share the co-op's vision) and able to accept the responsibilities of membership, and

- each member agency must be recognized by the Canadian Customs and Revenue Agency as being a charity or 'qualified donee'. The government authorities are 'qualified donees'.

There were different understandings of the first criteria of providing health and social service. Some participants thought that membership was restricted to agencies serving 'children, youth and families', while others thought every Coho nonprofit should be eligible. The Coho vision of agencies working together to provide a life-long continuum of health and social services is broader than the Foundation vision for a multi-agency building serving children, youth and families. The second criteria, being willing and able, caused the least controversy, although there was an understanding that the capacity of some voluntary organizations was not sufficiently developed to meet this criteria. The third criteria was concerned with the organizational capacity of the stakeholders, and also demonstrates the newly altered capacity of the co-operative structure. Whereas previously co-op membership could only be held by individuals, now a membership may be jointly held. This means that the members of each non-profit will collectively become one member of the co-op. The responsibility for the decision to become a member of a co-op, as for all other actions of a nonprofit, rests with its directors. Although the various stakeholders are quite different, in the Coho Co-op there is only one kind of member, with one vote per member. Member agencies may choose which people, and how many of them, they want to have involved.

In the interviews and from observation for the thesis research, it became evident that there was some confusion among participants about the nature of membership and some participants indicated a different notion of membership. One said *"I really hope the*

members will include some clients". Another admitted *"some of my understanding is still a little fuzzy"*, and a third respondent said *"I don't know that it has to be that formal"*. Some thought membership could be extended to 'clients' or community leaders. For some, the differences between agency size and capacity led to uncertainty about how those differences might impact Coho Co-op membership. There were different roles among those who attended meetings: one could be a representative or participate to support a stakeholder agency, a specific program, or the collaborative/political process. The Coho Co-op would be well advised to revisit the issue of membership, clarifying the difference between a member agency, the person who represents the member, and supporters. It may be beneficial to confirm that multiple participants are welcome and encouraged to share the work and to participate in developing consensus, but that each agency has only one vote if a decision comes to a vote. To address concerns about being inclusive of receivers of the services, a discussion to clarify their role in co-op may be helpful. Thus far, service receivers and community leaders have the opportunity to become involved primarily through becoming involved in one of the member agencies. For example, youth were involved, in the first and second stages of developing the co-operative, recruited by the community school society. Perhaps other opportunities for civic participation, such as public consultations, focus groups, or surveys, will be deemed helpful for the inclusion of care receivers

2. Exert Democratic Control

This second Principle is elaborated in the ICA Statement:

> Co-operatives are democratic organizations controlled by their members, who actively participate in setting their policies and making decisions. Men and

> women serving as elected representatives are accountable to the membership. In primary co-operatives member have equal voting rights (one member, one vote), and co-operatives at other levels are also organized in a democratic manner. (Ibid. p. 17)

The role of Coho Co-op members is to exercise democratic control of the co-op by sending a representative, and other supporters, to be involved in co-op decision making. Representation for governance purposes is provided by a mix of staff and volunteers, with volunteers being the norm for Coho nonprofits. It seems likely that the co-op will continue as it is now, with volunteers and staff working together, especially at the governance level. For volunteers *"what they are doing is a huge extension of the volunteer work that they are doing in their society"*, stated one respondent. Volunteers provide continuity. *"Coho as a community is strong because of its history of volunteerism and I think that the fact that lots of people round the table have been volunteers has been the strongest driving factor within the co-op"* concluded one of those long-time volunteers. Another commented as a staff person, saying *"it takes up a lot of time and it's outside of the normal hours that I'm used to working"*. Volunteers can claim for expenses and can expect extra consideration about meeting arrangements, in tacit acknowledgement of their unpaid time.

Because the Coho Co-op has a fairly small membership, all members meet to make decisions. Although an interim executive was elected to hold key positions during the later Coho development stages, it existed primarily to comply with and use the proposed rules of association and to deal with establishing signing authority at the Credit Union and a process for record keeping. The interim executive included some individuals who were not official member representatives, but only official representatives were allowed to sign the incorporation documents. As of the date of incorporation, the co-op

was preparing to renew its executive. It would be helpful to develop an understanding of powers and constraints for both official representatives and executive. What is the executive authorized to do? How is it determined when representatives must be allowed time to consult with their boards? Time will be an important resource to ensure democratic control.

The role and participation of supporters is an interesting one, particularly in a situation where consensus is being built. The co-op uses a consensus building process, but 'the rules' do not mention this. Voting is the stated method of decision making. The desire to work through consensus arose from a concern for building a good foundation based on a very clear understanding of what everyone involved was thinking. 'Everyone' included many more than the official representatives. The use of consensus was strongly supported and one participant with extensive experience in group processes was called upon several times to explain the consensus building process clearly, often as a prelude to making an important decision such as accepting the child welfare authority as a member. Many supporters made valuable contributions during consensus building discussions and their continuing role may well be important for the success of co-op, providing a deeper understanding of the context in which the co-operative operates and a source of future leaders.

3. Participate Economically

The third Principle, Member Economic Participation, is elaborated in the ICA Statement:

> "Members contribute equitably to, and democratically control, the capital of their co-operative. At least part of that capital is usually the common property of the

> co-operative. Members usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all of the following purposes: developing their co-operative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transaction with the co-operative; and supporting other activities approved by the membership. (Ibid. p. 19)

Coho Co-op members must contribute to some degree to the economic sustainability of the co-op. Contributions will range from volunteer time and skills to money. A membership 'share' is a formality, does not cost anything, and is 'without par value'. Members plan to locate their programs in the building, spending money for space and for co-op administration. There will be a minimum space use charge for each member located in the building, based on the expense of maintaining a half-share of an office. The more space a member uses, the higher their contribution must be. It is possible that extra income may be generated through short-term space rentals. The members understand that any fiscal surplus, after operating and maintenance expenses, will be devoted to furthering the co-op's purposes. Members expect to hire staff to help them with their responsibilities, especially because so many representatives are volunteers. They believe the co-op will be able to afford this as part of their operating costs, because those operating costs will no longer include commercial rental rates. The Foundation paid for the land and the building, and retains ownership thereof. The Coho Co-op will sign a lease that will cost them one dollar annually.

4. Maintain Autonomy and Independence

> The fourth Principle is elaborated in the ICA Statement:
>
> Co-operatives are autonomous, self-help organizations controlled by their members. If they enter into agreements with other organizations, including governments, or raise capital from external sources, they do so on terms that

> ensure democratic control by their members and maintain their co-operative autonomy. (Ibid. p. 21)

Coho Co-op members expect to preserve their autonomy despite the changes that are occurring. Respondents were unanimous that belonging to the Co-op did not affect their independence but agreed that it did affect their inter-dependence. If one member fell upon hard times, a response from the other members would likely be necessary. Each agency's internal structure changed little. While many members receive public funds for providing services, may indeed rely upon such funding, they operate autonomously and are free to seek other sources of support. They were free to form this co-op. The co-op can make decisions with the same constraints nonprofits experience now (needed, congruent with values, sustainable) plus the constraint of a commitment to collaborative decision making.

5. Promote Education, Training and Information

> The fifth Principle is elaborated in the ICA Statement:
>
> Co-operatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their co-operatives. They inform the general public, particularly young people and opinion leaders, about the nature and benefits of co-operation. (Ibid. p. 23)

Coho Co-op members are expected to support education, training and information sharing. Representatives have responsibility for making sure that those they represent understand what the co-op is, what it intends to accomplish, and how it intends to do it. Of particular concern, in a stakeholder co-op, is the effort to educate and support staff and front-line volunteers in each agency about working together to deliver a continuum

of services. The impact of co-location has already started to filter through to staff because consultations over practical construction details included them from the third stage on. Some staff enjoyed dreaming about what co-location would be like. One interviewee stated

> *At the retreat one person was saying they couldn't wait to be in the building all together so they could have a staff room and get away from the children, and have their coffee break, and then there were other people in there saying, see, I can't wait to leave my coffee room and walk down the corridor and hear the kids laughing, you know?*

Staff were also consulted about the early development of co-operative policies and procedures beginning during stage five and employees made comments appreciating these inclusive processes.

The co-op has also had an impact upon its members through engaging in this research. As potential members consider joining, and current members recruit new representatives, the case study will help to explain the co-op's development, goals, and tensions. The research will have a role to play in determining the next steps for Coho to take and indicating issues other communities may encounter when undertaking the development of a co-op, such as the use of consensus or the inclusion of a broader range of stakeholders. It would be consistent with valuing research to make space for archival material and to devote resources to further research efforts.

Educating the community about the co-operative began with a modest but steady stream of articles in local media and the continuation of communication planning. The Coho Co-operative is arousing interest elsewhere and new connections beyond the community have been forged; with the other nonprofits in the district, with the

Foundation, with the managerial levels of provincial authorities, with the university in the city, and with the co-operative movement.

6. Promote Co-operation among Co-operatives

> The sixth Principle is elaborated in the ICA Statement:
>
> Co-operatives serve their members most effectively and strengthen the co-operative movement by working together through local, national, regional, and international structures." (Ibid. p. 25)

The Coho development committee benefited from contacts with the co-operative movement and demonstrated its willingness to reciprocate by sharing their experience and agreeing to act as a 'test case' for the BC Region of the Canadian Co-operative Association.

Coho Co-op chose to open an account with a Credit Union. Coho Co-op members appreciate being part of a world-wide movement that empowers individuals and communities.

7. Demonstrate Concern for Community

> The seventh Principle is elaborated in the ICA Statement:
>
> Co-operatives work for the sustainable development of their communities through policies approved by their members. (Ibid. p. 27)

Coho Co-op members expect to demonstrate their concern for community through participation in social planning. They have begun work groups to consider youth and mental health issues. The co-op also expects to be involved in provision of emergency social services when needed. In order to further demonstrate concern for community, members might consider the position of agencies and programs that have not benefited from co-op activities, namely the building project, thus far. The co-op might recruit new

member agencies by suggesting that joining is the practical way to promote future collaborative projects that may better suit their needs.

Although the Coho Co-op is just formed, a template for action that will guide the members is already explicit in the seven Co-operative Principles. By applying these principles in analyzing the data, congruencies reveal that the members of the Coho Co-op have a rich understanding of what a co-op is. Further, the analysis demonstrated that participants felt comfortable suggesting how they will act in the future.

Issues of Concern to the Coho Co-op

Lastly, the data from observations, documents and interviews revealed concerns and issues that merit synthesis and description, particularly because they are ongoing. These issues will likely be the focus of action in the future. The issues raised are sustainability, adaptability, charitable status, confidentiality, time, and strategies for growth and inclusivity.

Sustainability

Worries about sustainability are not acute, since the co-op will benefit tremendously from the donation of the building. A major project during the third development stage was a careful calculation of the sustainability of the building project, essentially a business plan based on operating costs of similar buildings. Members compared those projections with their current commercial occupancy costs to determine the financial benefit of co-location. Costs for common space are shared in proportion to the amount of dedicated space held. While members are aware that financial difficulties

may lie ahead, they trust that growing demand, the involvement of provincial authorities, and widespread interest in the project will protect the Co-op from failure.

What would happen if a member leaves? One respondent commented that *"It seems like the big guys are more important than the little guys...for the sustainability of the building."* Others thought that the co-op would be able to adjust and carry on. One respondent pointed out that *"One of the ways that we allowed for that quite well is by, for the most part not structuring by program but by function."* A space designed for children aged three to five, or for cooking and eating, will be adaptable for use by a variety of agencies. It appears that, while the co-op would be severely strained if it lost a member paying for a large portion of dedicated space, it has a chance to adapt because the building is an attractive asset. The implications are that the co-op will likely act in a way that keeps the big partners content and keeps the building and grounds attractive to other potential new members.

Sustainability also refers to the ability to continue to maintain volunteer and staff enthusiasm for co-operative practice. Members are concerned that each agency continue to send representatives who are clearly interested in fostering inter-agency connections. Stakeholders would be well advised to amend one or more volunteer or staff job descriptions to specifically include this role. Ongoing education for representatives about the co-operative way of working together will be needed. It will be important to emphasize that the Co-op's purposes extend beyond governing co-location in a building.

Adaptability

The members have acted to adapt to a rapidly changing environment and have indicated that they expect further changes. Most respondents thought that the Coho Co-op will be able to adapt to new challenges. Stated one respondent, *"You know, we dealt with (the child welfare authority) coming in, with all of the demands that came with it, and the upheaval and the struggles, and there's capacity within the group and community to deal with it, I'm certain of that now."* A few respondents thought differently: they worried that budget cutbacks, service delivery reorganization, and volunteer burnout will restrict the Co-op's ability to adapt. The contradiction is that capacity to adapt exists in this learning organization, and constitutes good reason for optimism, but resources can be diminished to the point where the co-op might not be able to function as it hopes to. The Co-op must act to prevent such diminishment.

One respondent pointed out another way that being a co-op may impact members' ability to adapt.

> *The focus of the co-op is to provide benefits to the members of the co-op and in this case the members are the agencies. Makes good sense in the model we have right now where there are multiple agencies. What I'm not too sure about is what would happen if our whole service delivery system changes, as a result of the funding restructuring and the governance restructuring in the region.*

Although nonprofits have adapted to changes in their relationship with government authorities, it appears that even more drastic changes may be imposed. In the event of such wholesale changes, the Coho Co-op may actually provide a bulwark against the diminishment of nonprofit autonomy. By becoming part of collaborative decision making, nonprofits may be able to maintain their voice and 'service partner' status.

Charitable Status

Charitable status raises concerns at both the Coho and Salmon district levels. Charitable status is prized because donations to recognized charities are deductible from taxable income and this benefit to the donor helps fundraising. The Foundation asserted that having such a designation was of paramount importance, particularly at the district level, because the Foundation plans to deal, in the long term, primarily with the Salmon Society. This concern was one of the reasons why the 'tried and true' society governance model was chosen, since many societies have achieved charitable status while only five co-ops in BC have been so designated. (Blomfield, 2002)

The Coho Co-op is preparing to apply for Charitable status because they believe that the Canadian Customs and Revenue Agency will consider only the purposes of the organization and will not reject the application because of organizational structure. Some participants have worried that if the co-op begins to fundraise, it may be competing with the individual member's appeals. If the application is successful, it will be important for the Co-op to proceed cautiously and to develop clear guidelines for collaborative fundraising.

Confidentiality

Another troubling issue is agency confidentiality. *"Everybody knows everybody's business"* said one interviewee. This transparency is generally regarded as a good thing, but not always. Competition for service contracts still exists, especially between regional and local agencies. Information sharing and informed consent are areas of policy that are

being re-examined to determine the changes needed to enable co-operative practice while respecting nonprofit autonomy and the context within which they operate.

Time

Several participants brought up the issue of the time that it will take to make decisions, saying that agency Boards need to hear from their representatives and that they are also *"learning a new language"*. The Co-op will need to be clear about how much time can be allowed for Boards to consider various issues that require decisions. Learning takes time and the Co-op must allow time to learn. One interviewee said *"I think everybody has their own ideas and it's going to be hard to really combine them all and keep everybody happy."* Agency staff will also need time to learn about the Coho Co-op's vision. One respondent expressed her feelings of responsibility for promoting this learning: *"I think the hard part is going to be, we have this really strong buy-in at the co-op table, but we don't necessarily have that buy-in at the staff level. It's going to be hard to transfer that out to the front-line workers and supervisors."* The common language that staff members share involves the services they deliver. In the latter stages of the development of the Coho Co-op, the issues discussed turned increasingly to a consideration of collaborative service delivery practices, such as a shared intake process, rather than governance. Providing education and training in co-operative practices will be an ongoing concern.

Strategies for growth and inclusivity

The Coho Co-op acknowledges that it is not as inclusive as some had originally hoped, because of the mandate of the Foundation and the building project. Growth or expansion of the co-op is unlikely to be addressed any time soon. In the current sociopolitical context, the focus of the Coho Co-op is more about completing the building project, moving in, maintaining sustainability and adapting to changes. Nevertheless, several participants have expressed their desire to widen the membership over time, particularly to include aboriginal peoples and seniors. Respondents also worried about a surge in demand for services from the poor and homeless. The challenge of facing poverty is pressing and solutions must be found. Members may need to reiterate that acting in the best interests of the co-op, to face the future by building strengths, is part of acting in the best interests of the community in the face of increasingly complex demands.

Summary

The findings presented in this chapter are the result of four analyses: a chronology of the stages of development, a thematic approach to further describe how the participants worked together, an examination of what was created through the lens of the seven principles of co-operation, and a description of the foremost issues facing the Coho Co-op. The stages of development demonstrate the commitment and resources devoted to the development process. It took a considerable length of time to learn about the various agencies, overcome distrust, and deal with contradictions they experienced. The practice of working together like a co-op during the process resulted in an organization that truly reflects co-operative principles. The expectations of the members are revealed in the

issues they anticipate dealing with in the near future. The findings illustrate the building of a network of child, youth and family serving stakeholders with newly refined norms, enviable resources and a commitment to ongoing collaboration to benefit each other and the community.

CHAPTER FIVE

DISCUSSION

This chapter offers a discussion of the study findings and suggests some implications for collaborative practice in the delivery of health and social services. The discussion has been organized by returning to the ideas in Chapter Two: a social economy that encompasses both nonprofit societies and co-operatives; health promotion, with its emphasis upon citizen engagement and community capacity building; and the concept of social capital, consisting of norms, networks and resources.

Social economy agencies develop a sectoral voice

The concept of a social economy provides a unifying view of a range of democratic institutions, including both nonprofit societies and co-operatives, existing to deliver goods and services. It sheds some light upon the external factors that contributed to the development of the Coho Co-op. Placing "the third sector" on a par with public and private sectors, in a way that emphasizes its economic impact, helps us comprehend the inter-related roles of voluntary organizations in our society. The ad hoc growth of the social economy has resulted in a complex, heterogeneous mix of services. Not only is a small town like Coho the home of several voluntary agencies, but the nearby city is also the home of many more agencies with a size advantage or specialized skills that allow them to serve a wider geographic region. The Foundation serves an even larger geographic region. In the public sector, provincial health and child welfare authorities have multi-layered structures that do business with the social economy. When the various agencies of the social economy began to work together, their strong emphasis on mutual

and community interests built a new strength. Relationships between the public and social economy sectors are changing.

The most frequently mentioned hindrance in the development process has been the impact of operating on multiple levels – local (Coho), district (Salmon) and further, indirectly and directly, with the Foundation and provincial government authorities. The Foundation's original plan was to build one building, but the nonprofits needs indicated that three were required. The Foundation still preferred to deal primarily with one entity, inclusive of the entire district and its three communities. The Foundation dealt with the Coho development committee directly regarding building design and construction, but after the building project is complete, the Foundation's landlord and fundraising mentorship roles will be exercised at the Salmon district level. The Foundation has been very clear that they will not be responsible for the operation costs of the building. Rather, they are more interested in turning their attention to other communities in the future.

Developing the sectoral 'voice' of the social economy required activity on a scale not previously experienced by these nonprofits. This level of complexity was a challenge for the Coho development committee. The complex, two-tier nature of the development demanded an effort to build relationships between the three communities, regional child health and welfare authorities, and the Foundation. Coho development committee participants had to undertake the interpersonal work required to build relationships between agencies and systems outside their community. They found themselves having to attend many more meetings and to read and communicate more than they expected. Participation was the key to building meaningful, trusting relationships between the stakeholders. Especially during 2001, there was a great deal of revisiting the basics of the

collaboration with a variety of potential partner agencies. Because participation levels varied widely, there were many expressions of frustration and worries about communication during this time. Communication gradually improved, but the importance of efforts to communicate more effectively and respectfully is an ongoing issue in the co-op. The amount of time and travel required increased and was particularly onerous for volunteers who were also caregivers of young children.

Organizations in the social economy are different from private business because of their democratic element. Their culture is based on concern for the common good rather than profit for investors. In the same way that private business devotes resources to competition, agencies in the social economy will have to devote resources to collaboration in order to build sectoral strength. The participation of their knowledgeable volunteers constitutes a level of contribution and accountability that reassures taxpayers and donors. The purview of volunteers has clearly expanded beyond their individual organizations, to working with other organizations with similar values and purposes. These Coho nonprofit volunteers were equal to the task of multi-stakeholder collaboration and have provided a demonstration of a sectoral approach to health and social services, where no private for profit operators were allowed to be part of the development. This distinction helps clarify a boundary and reinforces the concept of the social economy as a force in our society that can be clearly differentiated from the private for profit economy.

Three determinants of health

Throughout the development process, participants widened their view to explore and confirm common values of the different stakeholders, a vision that all could subscribe to whole-heartedly. That common ground proved to be the concept of a healthy community. It appears that participants understand a connection between this development and health promotion. But how do they understand it? The Foundation representative makes the connections this way – building a new building leads to partnering leads to healthy communities. The nonprofit representatives make the connections from the other direction: they are already demonstrating healthy working together in the community, leading to a reaching out for more partnering, and resulting in a building. Either way, the process has helped to bridge differences and build capacity.

Control of living and working conditions

A healthier community is one that is active in assuming more power over personal, socioeconomic and environmental factors that affect health. Control of living and working conditions is a key determinant of health. The various nonprofits were facing a situation of agency isolation, mistrust, and competition for diminishing resources. Past experiences contributed to a general sense that Coho was being ignored or marginalized in comparison to other communities nearer the city or in the city. As residents of Coho, they understood the accessibility needs of the families they served and were strongly motivated to advocate for community-based and locally governed services.

The critique of the status quo from members of the community was that services were fragmented, requiring service users to visit several locations and tell their story

many times. Agency representatives were critical of the poor inter-agency communication. For the majority of the participants, co-location was seen as a practical solution for both problems. A co-operative was one of two or three governance possibilities. In this case, the co-op structure was seen as an innovative way of expressing commitment to the idea of working together that extended beyond co-location to mutuality. As a key participant said, *"You have to 'get it' intellectually, you have to get it almost emotionally, in the sense of you have to put the advantage of the whole group before your own."* The mutual benefit aspect of co-ops not only promises attention to the needs and concerns of the various agencies, but also enlarges their focus. As another respondent said *"That's what's nice about a co-operative, it's not just what you can take, it's what you can offer as well."* This exchange contributes to increased understanding. *"There's a much better understanding and acceptance of members' contributions, and outside influences"* confirmed a participant. Perhaps any form of working together would have this effect but, of the formal governance options available, the co-op structure more specifically exists for mutual benefit. Many societies exist to benefit others, but co-ops uniquely emphasize benefit to members. For these stakeholders, mutuality is a focus that is more readily justified in times of scarce resources and demands for changes in practice. The co-operative governance model emphasizes that agencies work with and for each other through the co-op, and for the public through their programs and services.

The Foundation could have built a building without such an extensive community development effort, but they wanted to be a catalyst for agencies working together and achieving strength that would allow them to be self-sustaining. The Foundation had changed its constitution to encompass support for agencies providing services to children,

youth and families. They hired a facilitator to support both the Foundation and the agencies in working together to develop a collaborative relationship. The facilitator was vital to the success of the development, providing a great deal of ongoing documentation and process planning. The Foundation was clear about their interests and limitations, and has grown in understanding about Coho agencies. Several directors of the Foundation were familiar with co-operative governance through involvement with credit unions. One Foundation director said that the choice of a co-operative structure was the feature that particularly attracted support of the project.

Provincial government ideology stressed partnership. A respondent said *"Everybody that we talked to at any level of government...just kept saying there won't be any money for you (meaning the community) unless you guys work together, you have community support, and you collaborate. So we knew those were going to be the ground rules."* The child welfare authority funds many of the programs offered through these agencies, as well as undertaking child protection investigations. They wanted to control their costs and seemed willing to share some power and responsibility to gain flexibility with regard to their operations and scope of practice. The health authority supports health promotion, which embraces community participation, and funded the feasibility study with a community initiatives grant. The child, youth and maternal health programs had adequate space, but their staff also felt that they were working in isolation.

Most respondents spoke at length about their appreciation for the Foundation and the support they have given this community-driven process as well as their generous donation of the facility. The nonprofits and the provincial authorities seized the opportunity and worked to make the vision a reality. A key participant stated that

"Everyone said omigod, for once we've gotta do it, otherwise it's gonna just be storefronts forever! And there never will be any collaboration!" The most optimistic respondents said that it would have happened anyway, in one form or another, especially because increased collaboration is important to funders these days and also because three of the agencies involved already had a positive experience with co-location. The more pessimistic view was that this development would not have happened without the generosity of the Foundation and the ongoing support of the branches of government involved. These strong partners helped some nonprofits overcome their distrust of each other and begin to meet.

The most frequently mentioned benefit is new learning and the development of new relationships. There is increased understanding about the work that each agency undertakes, who the people governing those agencies are, and the issues each agency is grappling with. The very act of learning, particularly when it is done in a group setting, is empowering. New relationships develop in ever-widening circles of activity. In the near term, as the building - and the co-op running it - become operational on a daily basis, the relationship-building will extend to staff and programs. Tensions have eased as progress has been made and some stakeholders have experienced a changeover of volunteers without losing focus. A more positive public perception of the agencies was also mentioned as an anticipated outcome that some have already experienced. A politician attending the ground breaking ceremony was very impressed that the neighbours turned out to demonstrate their support, and that aspect of the event was featured in the local newspaper's account. This development brought the resources and networks of all the

stakeholders together in a way that increased their power to improve their living and working conditions.

Healthy beginnings

Healthy beginnings for children are another 'determinant of health' being addressed in this development. Young children relocating to the building will experience uplifting changes. The child-care programs will share new and purpose-built spaces, enhancing the quality of their programs. Whereas three childcare programs shared one space before, they will have two spaces and time for new programs will be available. The child welfare authority has been able to reduce its occupancy costs and demonstrate a commitment to changing practice. Health authority staff will share a space with parent-tot programs, bringing very young children and new parents into closer contact. A suite of counseling spaces will be shared by several agencies and this proximity is seen as beneficial, both for those receiving counseling and the part-time and volunteer counselors. It is hoped that many children and their caregivers will find their lives enhanced by a variety of health and social services, integrated and attentive to developmental needs, housed in a welcoming, child-friendly facility.

A few participants, however, think that the community asked for all services to work together, and this co-op is failing to deliver what the community has asked for. While the benefit is currently experienced by agencies serving children, youth and families because they fit Foundation's mandate, there is an uncomfortable awareness of failing to come to grips with values of life-long learning and caring for all members of the community. One respondent clings to an inclusive vision *"I just love the image, you*

can start coming to that building before you can remember and you are still able to come to that building after you've forgotten." A health promotion focus helps stakeholders recognize that poverty, inequality, isolation, and other contextual conditions influence human development and health, and ought not to be ignored in a continuum of services. There remain issues of inclusiveness and questions about including services for the relief of suffering. The Coho Co-op's wider concerns are stated in the incorporating documents, particularly in 'Purpose b) To improve the health and welfare of the people of the region through the provision of a range of health and social services for all ages, from prenatal care to rehabilitation programs for seniors' and in 'Purpose d) To relieve poverty in the region through the operation of a community kitchen, a clothing exchange, programs for persons with disabilities, and other similar charitable services', but have yet to be explored. The members are also aware that it may not be possible to do it all.

Social Capital: norms, networks and resources

The World Health Organization definition of Health Promotion also recognizes social capital as a determinant of health. The norms, networks and resources that helped the stakeholders work together are evident in the development of the Coho Co-op. The differences in size and resources among the members of the Coho Co-op were obvious. The parent-run preschool (a co-op of 18 families with one part-time employee) contrasted sharply with the family resource society (with 100 families and about 20, mostly part-time, employees). During this development process, agencies demonstrated their capacity to become members through the consistency and extent of participation by their representatives and supporters. The co-op preschool was able to send one representative,

while the family resource society was able to send several. Provincially funded health and child welfare services are not a bigger presence in the community, but they were able to pay staff to participate. Capacity to participate is not equally present in all organizations, especially those less formally organized. For example, when the first youth representatives moved on, there was no easy way to find replacements because the collective of youth had not remained active.

Agency strength is demonstrated not only by the formalization of 'society' (provincial) and 'charity' (federal) status but also by the networks they have developed. What capable people has the agency attracted? If one representative ceases participation, can a replacement be found? Perhaps it is not surprising that, when asked 'What helped?', the prevalent reply was *"it's the people"* and their *"sense of community"*. Geographically, Coho is an easily defined community where many of the participants have lived a long time. The participants believe that living and working in the same community is an advantage and their opinion is supported by a representative of the Foundation who said *"There was a sense of community that they had developed that was far beyond anything that I had seen before."* These residents could readily claim to understand the community's needs and aspirations, and act upon their passion for serving the community by volunteering for nonprofits. Volunteers are a primary resource without whom nonprofits could not operate.

In the interviews, while many participants were mentioned by name for their contributions, particularly those who provided leadership, most participants said that everyone's contribution is valued. One person said that the fact that participants are representatives carries a certain amount of respect and helps keep egos in check. *"Having*

strong individuals is great but an individual that's not connected isn't ultimately very strong. So my sense is that the strength of the individuals reflects with connection in the community, so they bring that with them."

The committee itself was homogenous in many ways, mostly female, white, and middle-class. There was little to distinguish between volunteer and professional. Respondents indicated that the significance of their gender rests primarily in their predominance as providers and users of these health and social services, but also suggested that the predominance of women made a qualitative difference by increasing the level of mutual support and empathy. I suspect that the impact of gender was greater than has been acknowledged. In a recent (2002) survey of 645 voluntary organizations conducted by Dr. Agnes Meinhard and Dr. Mary Foster from Ryerson University, it was found that feminist organizations are more likely than others to engage in more formal collaborations.

Many participants mentioned valuing the ability to *"step back"*, to listen to other points of view, and to consider the best interests of the community. A great deal of time was spent building and reinforcing norms for the collaboration, particularly the norms of trust and caring. The trust that built up was particularly evident when the participants were able to choose representatives for Salmon district meetings. One participant put it neatly *"there's a sort of resiliency there, a lot of ability to come and go, and I think too there is a lot of support and belief in each other's skills, which often wasn't there before."*

A popular expression used during the development process was a *"continuum of care"*, implying 'caring about' all ages and developmental stages, and providing services

ranging from public education to statutory intervention. The differentiated explanation of caring explained in Chapter Two adds richness to an examination of the reasons why the Coho Co-op was developed. One interviewee's comment was typical: *"It just evolved from our values of respect and wanting to really work together...and wanting everybody to have a say."* This comment is also typically modest. I observed that the need to overcome the isolation and competition of the past was strongly felt and Coho nonprofit representatives were 'taking care of' their community by taking responsibility for the scattered approach to health and social services that had developed.

Many respondents mentioned valuing the personal connections, the friendships, that were developing or being enhanced as a result of working together. I observed many examples of 'care giving', paying attention to individual discomforts, celebrating happy events, sharing the hospitality of some participants' homes, and expressing concern and sympathy for those experiencing sickness or loss. However, I also heard an entirely different attitude towards these values. One interviewee said *"The values were all very touchy feely and yes, those are wonderful but that wasn't the reason for us making a commitment. It was because we really wanted to work together with other agencies."* In this statement, the connection between valuing alike and acting together is not recognized, nor is the value of developing 'friendships' between service providers. The same person continued *"I couldn't want a nicer bunch of friends if I was looking for friends...but that's not why I was there. I was there to get all the organizations in Coho together."*

I found this attitude puzzling until I considered this issue in the light of the theory of care described by Joan Tronto (1993). It appears that most of the participants

understand their role in the Coho development committee as one of 'caring about' the community, while their participation within the society they represent is part of 'taking care of', by making programs and services possible. 'Care giving', each for the other during a lengthy development process, is seen as important for team-building and avoiding volunteer burn-out. However, for someone who does not see caring in this multi-faceted way, perhaps the activities that only prepare the way for better service delivery are not seen in the same light, or valued to the same degree, as those activities that can be directly experienced by care givers and care receivers.

The norms of trust and caring between members of the Coho co-operative extend beyond the participants to their networks – other volunteers, staff and program participants. Respondents often expressed a value of *"empowering the persons who will be served"* and *"clients being front and centre and having a place, a friendly and warm welcoming place to go"*. For example, having identified a lack of social services for youth, this committee has made concrete plans to develop some services for youth by committing to paying for some ongoing space for youth use. Participants still speak of finding ways to involve other social service agencies in the future. It is not surprising that those involved in the Coho development committee also cared about the use of power.

Caring about the use of power

The Coho development committee 'cared about' power imbalance and mistrust, knowing that this would damage their ability to collaborate. A history of tension and mistrust between some of the agencies involved was frequently mentioned. As one participant put it, *"It's a shame how, in child and family services, or in social services in*

general, because of the way that the funding processes have been, we've been pitted ...it's more of a competitive environment than a collaborative environment or a co-operative environment." The largest Coho nonprofit had, through years of competition, grown at the expense of another. In addition, disagreements between funders and community-based agencies have arisen. For example, some policies and practices for the protection of women and children experiencing domestic violence contributed to tensions between the child welfare authority and the women's transition house society. It appeared that the co-operative was able to overcome some of the distrust between members, at least to the extent that the agencies remained engaged and committed to collaboration.

Outstanding individual and agency strengths also contributed to a sense of power imbalance. The family resource society and the community school society had drawn in several participants each, including some strong leaders. Although extra help was needed and much appreciated, at least two other participants felt unequal because their nonprofit was only sending one participant. It is possible that other stakeholders did not participate because they had no one to send. An unequal ability to provide representation contributed to distrust. In the Coho development group, a co-op governance structure was chosen to provide as much reassurance as possible that equality and co-operation in decision making was of paramount importance.

Coho participants spoke their concerns about the use of power in the Salmon development group meetings as well. It was at the district level that the more powerful stakeholders participated most fully, where neighbouring communities were still experiencing competing interests, and where nonprofits' capacity varied most widely.

The late entry of the provincial child welfare authority (March 2002) delayed the process. One participant said *"(they) came in and that has hindered the process, because that was a step back in the trust piece and think it still is for some people"*. This government agency has exercised power over the nonprofits because it provides funding for many programs: in the past it has called for competing proposals and has made unilateral changes affecting service delivery. Other 'top-down' interactions have contributed to tensions, especially recent decisions to implement drastic spending reductions. Several participants did not trust the child welfare authority to respect their community-based perspective. Participants also worried about the reaction of their clients who might be fearful of becoming known in any way to child protection workers.

A marked difference between the Coho development committee and Salmon development group was the participation of volunteers. Coho nonprofit directors volunteered at both levels, while the other stakeholders were represented by paid staff. The Coho development committee met in the evenings: the Salmon development group met during the day. Only some Coho volunteers were able to attend daytime meetings, but those who did contributed remarkable enthusiasm and expertise. Indeed, several were highly qualified consultants who, at times, expressed an interest in returning to the paid workforce. Volunteers with daytime jobs were unable to participate at the district level.

Underlying the gratitude and respect for the volunteers, there is an unsettling undercurrent of inequity. This issue is not new, but it may help explain why the Coho participants exercised a strong voice to promote equality through a two-tier co-op model that would see Coho Co-op members governing equally at the local level and the three communities governing equally at the district level. In a situation where stakeholders

have a diversity of resources and abilities, the concept of equality has more to do with mutuality and reciprocity in the use of power. Equality is part and parcel, with liberty and fraternity, of a democratic structure and Coho participants saw an opportunity to propose the most equitable structure available. They often used the expression *"one agency, one vote"* to emphasize that no one agency was more important that any other. The two-tier co-op model remained a possibility in the development plans for over a year and a half. However, by April 2002, aspects of the two-tier model had changed. The Salmon district entity will be a nonprofit society and the Coho Co-op will be a member of the Salmon Society in order to continue its relationship with neighbouring communities and district wide service providers. Several Coho participants expressed their regret at this development but were unwilling to block the decision, since a nonprofit society governance model was a legitimate option. This decision was not the end, however, of changes that would lead away from a focus on equality.

As the Salmon Society rules of incorporation were developed, an important change in the governance model was proposed. In the Salmon Society, the Foundation, the health authority, and the child welfare authority have been given membership/voting privileges separately from the community-based entities. In addition, membership may be conferred, 'with the unanimous consent of the members', on other persons.

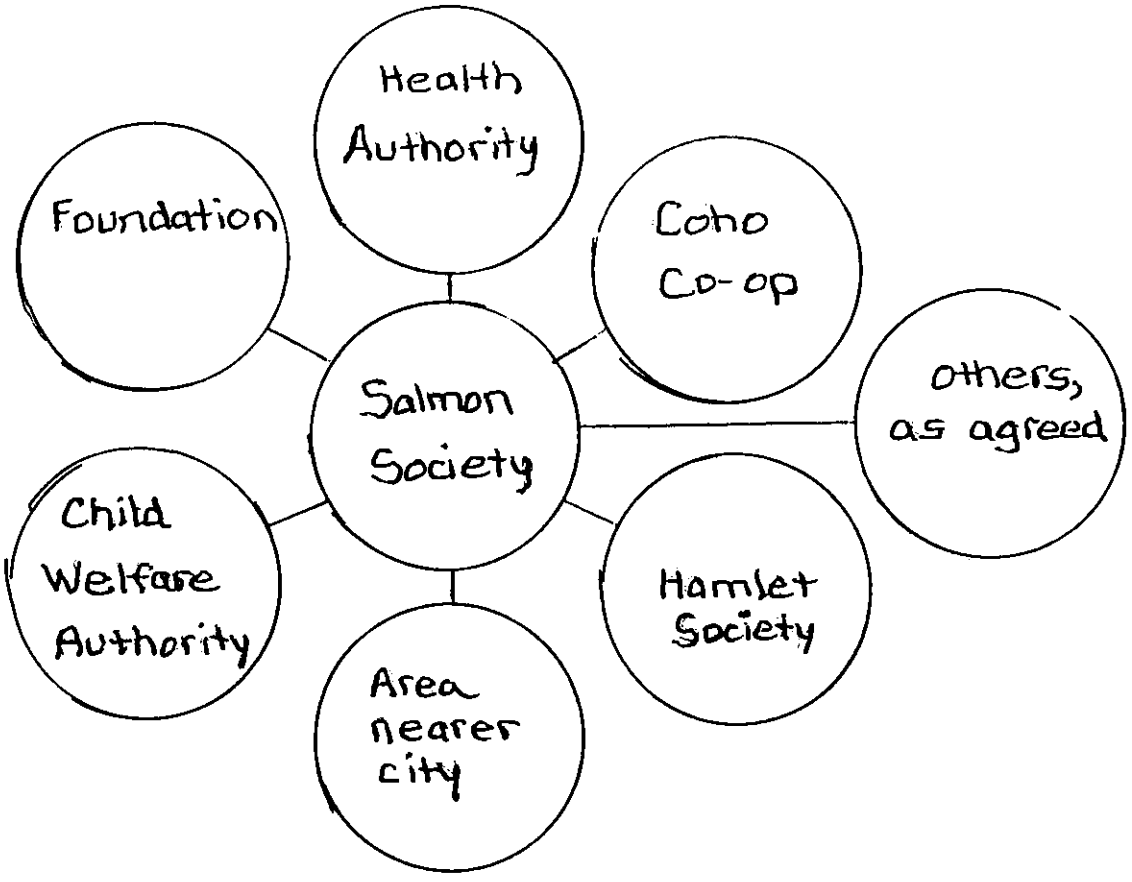


Diagram 2 – Proposed structure of the Salmon Society (May 2002)

Protest was voiced when the Salmon Society proposed to allow the health and child welfare authorities separate votes in district decision making, while also being represented as part of the Coho Co-op. In this situation, both a Coho nonprofit member and a Coho-based government authority member would contribute equally to a Coho decision that might then be taken to the Salmon district level but, at that district level of decision making, the local nonprofit would have no further vote while the government

authority would. These proposed changes altered the balance of power in decision making in a way that would not have been possible in a two-tier co-op. A letter from a Coho participant pointed out the loss of the focus on equality through this change.

> *Without the foundation for equality it is a worry that we, in climate of fear that comes and agencies afloat, will slowly slide into becoming the same old story with just a different picture on the cover.* (Sept. 23, 2002)

This evidence of fear and uncertainty reveals the mistrust and the change desired. The letter stated this participant's strong preference for a structure that is *"community focussed and community driven"* and pointed out that now the regional entity appears at least half 'driven' outside the communities. A couple of responses from other participants justified the change in terms of the Foundation and government authorities having money, statutory responsibilities, and *"the experience and the mandate to keep us strategically aligned with the government's vision"*. At the next Salmon development group meeting, this concern was dismissed as not needing further discussion. Although the protest did not effect a change, it demonstrated that a Coho participant cared about the success of the collaboration and believed that inequality would be damaging.

Traditionally, co-operatives are often interconnected through multi-levels of interaction, forming federations of co-ops and alliances of federations. The equality of each member, at each level, is affirmed. In contrast, the alteration of the Salmon / Coho model demonstrates an exercise of power that has diminished stakeholder equality. The reaction of some Coho representatives demonstrates that they were hoping for an increase of 'power with' and thought the two-tier co-operative governance model would best serve that goal.

Networks for 'power with'

The development of the Coho Co-op exemplifies a trend towards mutuality in public services that may be conceptualized as 'power with'. The creation of these new entities, both the co-op and the society, served to address not only the needs of the nonprofits but also the changing policies of stakeholders with money and power. The agencies involved were already organized for member and public benefit but a new level of mutuality was wanted between stakeholders, despite their differences. Throughout the development process, tensions and contradictions revealed an ongoing adjustment of power within a variety of relationships, a reduction of 'power over', an increase in 'power to', and a start of 'power with'. A reduction of 'power over' occurred as the child welfare authority asked to join, as the Foundation listened to the community and changed its view of what needed to be done. An increase in 'power to' occurred through this development. The nonprofits wanted a more collaborative context in which to work. The tremendous differences in power between the various stakeholders was perceived as a barrier to effective collaboration and choosing the co-op structure was seen as one way to empower community-based nonprofits. Beyond an improvement of their 'power to' serve, these agencies understand and celebrate their unique contribution to the renewal of prevailing social, economic and political practice (Vaillancourt, 2002). Because they participate in democratic institutions that make a difference in their community, they place their emphasis on *"having an equal say"* at all levels. This development can be understood as another approach to policy change that is not advocacy, but the start of 'power with'.

The member agencies were buoyed by a sense of empowerment through mutual support. They spoke of building strength for the future and of the positive impact on the lives of the children. As one participant put it, *"My sense of why the co-operative model would have resonated for so many people was that it really spoke to collaboration, trust, mutuality, all those things that people were beginning to experience, it was very refreshing. Because we don't work like that."*

At the beginning of the development process there was a desire to be as inclusive as possible. The Coho development committee tried to contact all of the non-profit and service agencies in the community. This attitude remains, and many participants think that any charitable agency providing health and social services will be able to become a member in the future. One interviewee said *"I'd like to think the co-op could always absorb new people. Even if there's not room for them in the centre, I think it's critical we always do that."* However, some participants commented about the emphasis on 'children, youth and families' creating a specialization that excludes potential members. Membership in the co-op is commonly equated with participation in the building project. As for the future, some respondents think joining will be contingent upon availability of space to share, ability to pay, and fitting the 'services for child, youth and family' criteria. Although the Foundation insisted that the building project must benefit children, youth and families, this has not restricted the scope of the Coho Co-op's purposes, as reflected in its governing documents. In particular, its second purpose is clearly stated: to improve the health and welfare of the people of the region through the provision of health and social services for all ages, from prenatal care to rehabilitation programs for seniors. Nevertheless, the development of the child, youth and family oriented multi-purpose

building constituted a big task that has dominated the development committee's agenda and the criteria for participation in the building was a factor contributing to a sense of exclusion. The co-op must comply with the Foundation's criteria of providing services for children, youth and families in their building, but the Co-op has the potential to reach out beyond the building to plan other inclusive projects in the future.

About half of the total number of participants in this process left over the two and a half years, although the number of people attending remained similar. Drop-outs were largely the result of the marginalization experienced by less formally organized voluntary service providers (such as youth leaders or restorative justice advocates) and by agencies whose needs would not be met by the building project (such as the crisis centre and the food bank). A participant with connections to youth wanted to see youth involved, but did not think youth would want to be in the same building as parents and younger siblings. A director of the crisis centre society said *"I think many mothers do not, would not feel comfortable around some of the people that we deal with. And some of our people might not be comfortable coming to a new building with a posh look."* The reasons for the lack of participation by the local aboriginal nation are not known, but sudden changes in their governance and staffing structures may have had that effect. The hospice ceased participation in March 2003 when beset by other problems and the co-operative lost the last potential member that was not planning to move to the building.

A few people thought that participants dropped out because no structure could effectively counteract the reality of the power of those agencies with adequate money and manpower. The stronger agencies could send more participants and dominate the agenda. One respondent thought that because the stronger agencies are child, youth and family

focused, the Coho development committee did not try hard enough to promote the original vision of all agencies working together. Agency capacity or 'power to' appeared to be the crucial element necessary for forays into the realm of 'power with', and I detected a further difference affecting strength between those nonprofits which became members and those which did not.

Charities in Canada are becoming increasingly secularized and universalized, meaning that their services are motivated by a sense of social responsibility and offered as widely as possible. I observed that the Coho Co-op member agencies are part of this trend towards mutual aid and benefit to all. Each of the member nonprofits were created and sustained primarily by women as a practical response to the marginalization of their health and social needs, and those of their children, within the private economy and government. These agencies tend to charge fees or contract with government for most of their income, and to hire staff rather than rely excessively upon volunteering for direct service delivery or fundraising. This practice has made those agencies stronger because it preserves the energies of volunteers for governance and policy concerns. Participating adults, whether fee paying or subsidized by government, constitute the membership of the nonprofit. The difference between membership oriented not-for-profits and co-operatives is small and their values and cultural practices are also similar. As one respondent said, *"We were working generally co-operatively within the agency and that (is) being reinforced by the co-op."*

It appears that working together is creating beneficial changes for those nonprofits that fit the Foundation's mandate, provide income generating services to diversify their financial resources, and devote volunteer energies to governance and development issues.

Those agencies having a more traditional charitable focus on the most needy were different in that they seemed not to have the capacity for or a compelling interest in this collaboration. Their clients are disadvantaged and less likely to be strengthening the agency by paying fees for service or volunteering. Collaboration demands extra work that may impede progress within the agency, particularly when extensive fundraising and front-line volunteering is vital to the provision of services. The women's transition house is 'on the cusp' between those agencies who are providing health and social services to children, youth, and families who can afford to pay fees or who are subsidized by public funds, and those agencies without those strong economic supports and/or addressing other determinants of health such as hunger and homelessness. Members recognize the marginalization the women's transition house society has experienced through having to rely extensively on volunteers for caregiving work and fundraising. They are pleased that, despite these difficulties, the transition house society became a member and they hope to help with vocal support, shared fundraising, etc. in the future.

Each nonprofit weighed the costs and benefits of participation and determined their level of participation accordingly. Indirect or 'community development' benefit, even though a possible locus for the exercise of 'power with', has not proven to be sufficient reason for participation by a nonprofit that was not needing the building project. As the focus on the building project relaxes, the wide scope of the Co-op's purposes needs to be made clear to potential new members and to the community at large. It may be possible to continue to promote an increase in 'power with' by encouraging a wider membership in the Coho Co-op to enable other projects of mutual benefit. The

implication is that the members have work to do to determine the co-op's will and capability to address its wider purposes in the short and long term.

Co-operation in a complex environment

The co-operative sector is beginning to see results of the recent (2001) changes in provincial legislation. The goal of those changes was to enhance the 'enabling' characteristics of the legislation, and one amendment allows so-called 'multi-stakeholder' co-ops. This thesis case study demonstrates an effect of the revised legislation in BC. After a similar change of legislation in Quebec, in 1997, that enabled the development of 'solidarity co-ops', more than 260 such co-operatives were formed in the first five years (Girard, 2003). Is it possible that a similar surge of co-operative development will occur in BC? This case study provides an example of volunteers using nonprofits to take care of health and social service needs, but using a co-op to build community assets and political space.

The choice of a co-operative governance structure has to do with paving the way for establishing a forum where trust may be built. These kinds of co-ops can take quite complex forms, with differentiation of types of members, but this possibility was not taken up during this development. Rather, the participants chose to keep it simple and to emphasize the equality between members. This co-operative is creating political space, a framework for allowing nonprofits an equitable say in adjusting policy and practice that will be seen as different from 'advocacy'. The term 'solidarity' co-op, a term widely used in Quebec to describe 'multi-stakeholder' stakeholder co-ops, reflects the sense of empowerment expressed by the respondents.

I find it interesting to reflect upon the choice of words used to describe this kind of co-operative. The true name of the co-operative makes it clear that it is a co-operative of service agencies, but the focus of health and social services is not explicit. To make it explicit one could use descriptors that emphasized the members' values, such as solidarity, or areas of interest, such as women's transition, or level of investment, such as stakeholder. Because the term co-operative encompasses the values, I chose to describe this co-operative as a health and social care co-operative.

In an environment where agencies vary markedly in size and purview, it is interesting to observe that co-operatives can operate on multiple levels, to fit with other structures of different sizes and thus connect communities throughout a school district, a health region, and as broadly as is useful. 'Power with' can be preserved at every level in a multi-tiered co-op. The effort required of members must be of substantial benefit to them or they would not participate. Accountability is thus required of any broader level, or tier, demonstrated by being of sufficient mutual benefit, and thus trust may be built and maintained at every level.

Nonprofits, especially those that are member oriented, have built up their social capital and are interested in collaboration for mutual and community benefit. The most inspirational aspect of researching this development was to realize the impact of the volunteers. They brought 'the client' vision to the fore because, especially in the case of member-oriented nonprofits, they either <u>are</u> 'the clients' or identify very strongly with them. Their privilege in being able to participate does not mask or negate their experience of caring about, taking care of and care giving for children and youth as well as receiving care through family and social support. In addition, these volunteers were democratically

supported by many others. Occasionally participants talked about 'the clients' in a way that implied they were missing from the discussions, creating an artificial otherness. The role of volunteers involved in governance of nonprofits has usually included some public relations and social planning, but this development has formalized a new level of 'power with' that increases their role in policy making and practice innovation.

The limitations of the co-operative model of governance have to do with the choices and compromises the members must make. The members must realize that the co-operative may only be effective in the service of a certain kind of member or a limited number of members. The study identifies a major resource concern, the achievement of charitable status for the Coho Co-op. In this case, the importance of charitable status meant that privately operated services and groups without such status were excluded from membership. This may be have been necessary to create an effective organization, and now the work of the co-op will necessarily include an ongoing effort to build and maintain relationships with the rest of the community's organizations and the first Nations' government and organizations, as well as the municipality.

It remains to be seen if the Co-op attains charitable status. If successful, the work of the co-operative will be able to include collaborative fundraising, a process that also builds public awareness. A successful application will likely encourage other nonprofits considering a co-operative governance option for collaboration.

Decisions made for the mutual benefit of agencies may conflict with the altruistic intentions of the volunteers and donors. Member commitment to financial support of this collaborative level of governance may be seen by donors as a poor use of scarce resources. Educating members and the public begins with a substantial effort to explain

the importance of resources, networks and shared norms for contributing to the health of a community.

The participation of the government authorities in this co-operative has demonstrated a move beyond individual contractual relationships. Although 'public-private partnership' has been a popular expression in government circles, it is thought by many that profit-taking as part of providing health and social services is not in the best interests of the people. A pluralistic understanding of the Canadian economy that includes a social economy suggests that formal collaborations among government agencies and organizations in the social economy can suit both government and community values and purposes. Nevertheless, the power and bureaucratic concerns of provincial authorities will challenge the co-operative's norms and processes. A practice of challenging real or perceived inattention to clearly stated principles and purposes should be encouraged and celebrated.

Conclusion

The planning and organizing stages of this community development would not have occurred without the significant existing social capital contributed by the community-based agencies. The Coho Co-op was grounded in the similar norms of the member agencies. Good will between agency representatives was a valuable asset. Respondents frequently described their willingness to work together and some agencies had previous experience working with each other. As Newton outlined (1997), social capital consists of norms, networks and resources. The agencies involved in this development wanted to be more involved in the definition and delivery of services and

spoke of avoiding competition, ensuring that all people are heard, sharing resources, building community capacity, and valuing volunteerism. These ideals called for new relationships and the Coho Co-op has become a new network in the community. New resources, in the form of a paid facilitator and a donated facility, provided the third ingredient to increase the social capital of the community of Coho. The building project offered service providers an opportunity to demonstrate that they were willing and able to collaborate to serve the needs of the community as a whole. One respondent acknowledged that this was not an easy task: *"This is always a struggle for people, to build something that reflects the needs of the community even though it may not be what you want it to be, and to balance that".* This development demonstrates the emergence of collaborative norms, a co-operative network, and shared resources that are contributing to solidarity between the stakeholders and, hopefully, to improved health and social services for Coho and its neighbouring communities.

The nonprofits wanted more public awareness and support for their community-based approach to health and social services. The ideals of the Coho Co-op are thought to be accessible. Respondents referred to public perception of co-ops, saying that co-ops are easy for the public to understand, inclusive and friendly. Choosing a co-op structure *"is particularly beneficial as a statement about how things get done. It says we do business differently here and that's worth an awful lot in this climate, I think".* When the Salmon development group decided to form as a society instead of a 'second tier' co-op, one participant voiced regret at *"losing the word, co-operative"* because it is such an easily understood statement of a fundamental value that members share. Participants expect that the equality and inter-dependency involved in being part of the co-op will have many

benefits, including helping their agencies cope with upcoming challenges. As an interviewee exclaimed *"We'll be thanking our lucky stars that we have a co-op that we can be a part of."*

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APPENDIX A **Glossary**

Case Study: a research methodology that uses a variety of data sources to provide evidence that ensures an accurate and rich description of a particular contemporary event or situation.

Child: A person under 19 years of age and includes a youth (as defined by the *Child, Family and Community Services Act).*

Coho development committee: A committee consisting of representatives of nonprofit societies serving children, youth and families in the town of Coho, as well as interested individuals and representatives from various regional and provincial government services, formed in late 2000 to explore ways to work together for the benefit of each other and the community.

Community: a group of people with something in common; defined by the relationships between the people. "Community" may be defined by geography, by organization or institution, or by interest, need or shared purpose.

Community Action Research – an emerging research methodology, enunciated by Leslie Brown and Marge Reitsma-Street, which features four values and ten processes found in the efforts of people in a community who learn together and act together to solve problems.

Complexity: consisting of parts; complicated, involved. This concept is leading to attempts to understand the movement that occurs in a complex situation.
"Complexity is defined as partially structured or ordered chaos at the Santa Fe Institute, where a 'new science of complexity' is being forged by scholars as different as molecular biologists seeking the origin of life, astronomers seeking the structure of the universe, ecologists explaining transitions in environmental systems, or economists seeking to find an alternative premise to rational behaviour for economic systems (Waldrop, 1992. quoted in Bradshaw, 2000, p.135)

Co-operative: An autonomous association of agencies and organizations united voluntarily to meet their stakeholders' common economic, social, cultural and health needs and aspirations through a jointly owned and democratically controlled enterprise.

Determinants of health: health status of individuals and group is influenced by the social, economic and physical environments in which people live and work. Key determinants of health include economic, educational and work status, family characteristics, social relationships, geographic location of home and status of the physical environment.

Family: A group of people who are connected to each other through birth, marriage or relationship ("kith and kin") and that define themselves as "family" for the purposes of providing mutual support.

Health Promotion: "a process of enabling people to increase control over, and to improve their health. Health promotion, through investment and action, has a marked impact on the determinants of health so as to create the greatest health gain for people, to contribute significantly to the reduction of inequities in health, to further human rights, and to build social capital" (The Jakarta Declaration on health promotion into the 21st century. WHO, 1997, p.1)

Healthy Communities: the definition of a "healthy community" is ultimately determined by the people who are a part of the community, based on their shared vision of health and community. However, healthy communities tend to be defined in similar ways across different types of communities. Key attributes include:

- Accessible and meaningful educational and work opportunities
- Accessible, affordable and safe housing
- Access to quality health care
- Health-supporting environments
- Accessible systems of governance
- Safe and supportive communities in which people are protected from physical and emotional harm
- Systems of support for people requiring assistance with daily living

Multi-stakeholders organizations: Associative and cooperative forms have evolved quite markedly towards a new model of organization which displays the following characteristics;

a) it produces various types of welfare services by explicitly pursuing a goal which differs not only from profit but also from economic benefit deriving exclusively for a specific category of members;
b) increasingly it has a membership which consists generally of diverse stakeholders: users and workers employed in the organization, or workers and volunteers, or all three categories or, in addition, benefactor members and representatives from public bodies;
c) it undertakes democratic management which ensure participation by the stakeholders in all decisions;
d) it does not necessarily adopt the non-distribution constraint, although it can usually distribute profits only to a limited extent.

(Borzaga and Santuari, 1997)

Neighbourhood House: A model of community development that derives from the Settlement House Movement begun in 1884 and based upon the belief that only through mutual teaching and sharing could goals be met and social conditions changed. A neighbourhood house is guided by Directors who live and work in the neighbourhood.

Participation: The act of taking part, of sharing: an individual's exercise of democratic right and responsibilities.

Salmon development group: A group consisting of representatives from nonprofit societies serving children, youth and families in several municipalities contained within a single school district, as well as representatives from a charitable Foundation, interested individuals, and various regional and provincial government services, formed in early 2001 to explore ways to work together for the benefit of each other and the community.

Social capital: A community asset that develops through the relationships between members of a community. It represents the extent to which people have invested in networks and trusting relationships that allow for the community to 'make things happen' for the benefit of the community. Social capital is "the capacity to create our communities through networks and the trust they engender and relies on citizen participation in creating health families and communities." (Coleman, 1988)

Social economy: the social economy is identified with a "third sector" of the economy in order to distinguish it from the market economy, from the public economy (the state and its extensions in public and parapublic networks), and from the informal sector (the family, natural helpers). Social economy enterprises and organizations have these characteristics:

- Pursue objectives that are simultaneously social and economic in character. However, social economy enterprises are not profit-oriented;
- Are made up of citizens' associations (as opposed to shareholders) that meet the needs of their members. The leading entities of the social economy are community organizations, cooperatives and non-profit organizations;
- Produce goods and services and provide support for citizenry (for example, through advocacy);
- Have distinctive organizational structures for making decisions and a democratic form of organization promoting joint involvement by employees, users and, in some cases, members of the surrounding community;
- Rely substantially on paid work and emphasize job creation. However, some social economy organizations (those with a formal structure and that are legally recognized as non-profit organizations) also accommodate volunteer resources; many enterprises and organizations count on these resources to deliver certain services;
- Foster social cohesion and social bonding.

(Vaillancourt and Tremblay, Eds. 2002, p. 21-22)

Thesis research – inquiry conducted by Laura Dowhy to explain the development of the Coho Co-op.

Thesis committee – three University of Victoria professors who act as Laura's guide as she conducts research to obtain a Masters Degree.

Working together: Interlocking human relationships that identify common ground and share resources to promote mutual empowerment.

Youth: A person who is between the ages of 12 and 24. The programs and services offered by the agencies participating in the co-operative may apply different age criteria to their youth programs, based upon criteria established in legislation and policy, by funders or by their constitution and mandate – for example:

- The *Child, Family and Community Services Act* defines youth as a person 16 years of age or over, but under 19 years of age
- The *Mental Health Act* defines youth as a person over 12 years of age but under 17 years of age
- HRDC-funded youth programs define youth as up to age 24.

APPENDIX B

Informed Consent to Participate in Research about
the Development of a Social Services Co-operative

You are being invited to participate in an interview with me, Laura Dowhy. I am a graduate student in the Faculty of Human and Social Development at the University of Victoria and you may contact me if you have further questions by telephoning 642-4282. As a graduate student am required to conduct this research as part of the requirements for a Masters degree in Human and Social Development. It is being conducted under the supervision of Dr. Marge Reitsma-Street. You may contact my supervisor at 721-6468.

You may also know me as an employee of one of the agencies involved in the study and as a parent and volunteer in the community. I am conducting this research with the endorsement of t Sooke development committee (July 3, 2001) and we have agreed that we will have a cooperati approach to developing goals, gathering data, and determining useful outcomes. We also have a understanding that the research role I undertake is not only for my personal educational purpos but also my contribution as a member of the community.

The purpose of the research project is to document, in a case study, the decisions and tensions o one committee of representatives from not-for-profit agencies as they engaged in the developme of a co-op as a legal entity for collaborative work in the field of social services for children, yo and families.

We want everyone to know how and why these voluntary agencies responded to an opportunity work together. It will reflect respect for the effort and may contribute to the community's confidence. The research may provide evidence that a co-operative governance structure, as newly constituted in BC, has features that are helpful for not-for-profit agencies serving childr youth and families.

You are being asked to participate in this study because you have attended at least one of the meetings of this committee. If you agree to voluntarily participate in this research, your individual participation will be an audiotaped interview.
The purpose of the interview is to obtain your understanding and views about the purposes of t 'Sooke development committee' and the processes used as it formed a co-operative association You will have control of the tape recorder. You will be offered a two week opportunity to examine a copy of the transcript for accuracy and asked to indicate with your initials when you have done so. You can make changes to the transcript, in discussion with Laura, if you wish.

You will be invited to participate in a meeting to hear and respond to the preliminary findings o the research. At the meeting the participants will have an opportunity to confirm the accuracy quotes taken from the record of my observations.
You are also invited to provide individual feedback.

There are no known or anticipated risks to you by participating in this research. However, you may have feelings of discomfort when re-visiting tensions experienced in committee work. Th potential benefits of your participation in this research include increased insight and empowerment through this opportunity for involvement and reflection.

Your participation in this research must be completely voluntary. If you consent to an intervie you may withdraw at any time without any consequences or any explanation. If you do withdr your contribution to the committee discussions will stand. Your interview data will be used onl if you provide consent in writing.

The case, as the work of the Sooke development committee is publicly known, may be identifiable even though not named. No individual or agency will be identifiable in either the analysis or the write-up of the results. Code names will replace any identifying information recorded in the data.

Your confidentiality and the confidentiality of the data will be protected by the use of code names. This informed consent Letter will be kept securely locked and separate from other materials connected with this research. The tapes and transcriptions will be kept securely locked when not in use, accessible only to the investigator. A paid transcriber in Victoria will hear the voices on tape, but no surnames will be used in the interviews. After you approve the transcript the tape will be destroyed. The transcripts will be retained, securely locked, along with the documents and records of observations.

The transcripts will be used as one source of data for the thesis.
No other use of the transcript is authorized herein.
The transcripts may possibly be used in future research, but I will seek additional informed consent at that time.

By signing this form you are acknowledging that you understand the purpose and activities involved in this study. You are giving consent to take part in the study. The data collected in this study will be presented in a thesis and directly to the research participants. The Sooke development committee has agreed to work together to develop useful formats for reporting the findings publicly. The data may be presented at conferences and in papers.

In addition to being able to contact the researcher and the supervisor at the above phone numbers, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Associate Vice-President, Research at the University of Victoria (250-472-4362).

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researcher.

_____	_____	_____
Name of Participant	*Signature*	*Date*

A copy of this consent will be left with you, and a copy will be taken by the researcher

challenge minds
change worlds

UNIVERSITY OF VICTORIA - HUMAN RESEARCH ETHICS COMMITTEE

CERTIFICATE OF APPROVAL

PRINCIPAL INVESTIGATOR	DEPARTMENT/SCHOOL	SUPERVISOR
Laura Dowhy **Graduate Student**	**HUMA**	**Dr. Marge Reitsma-Street**
CO-INVESTIGATOR(S):		

TITLE: **A Case Study of the Development of a Social Service Co-operative**

PROJECT NO.	START DATE	END DATE	APPROVAL
406-01	**2/16/2002**	**2/15/2003**	**2/16/2002**

CERTIFICATION

This is to certify that the University of Victoria Ethics Review Committee on Research and Other Activities Involving Human Subjects has examined the research proposal and concludes that, in all respects, the proposed research meets appropriate standards of ethics as outlined by the University of Victoria Research Regulations Involving Human Subjects.

J. Howard Brunt,
Associate Vice-President, Research

This Certificate of Approval is valid for the above term provided there is no change in the procedures. Extensions/minor amendments may be granted upon receipt of "Request for Continuing Review or Amendment of an Approved Project" form.

OFFICE OF VICE PRESIDENT RESEARCH
Room 424, Business & Economics Building
P.O. Box 1700
Victoria, BC V8W 2Y2

Tel: (250) 472-4362
Fax: (250) 721-8960
E-mail: ovpres@uvic.ca

Dowhy, Laura
406-01

APPENDIX C

Template for Case Studies

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Name of Co-operative:

Date of Incorporation:

Membership:

Activity: (In brief: What does the co-op do? (also in context) – E.g this is a workers' co-op that is involved in artistic activities, doll-making, however, the activity of doll-making is not only for ....but also to....

Organisational form (e.g.worker/producer co-op, consumer co-op

Area served:

Story of the Co-op

Background Info / Context

- What were the needs identified that led to the establishment of the co-operative (e.g. lack of natural foods, employment)?
- What sort of planning and/or organising was done before the co-op was incorporated?
- What was the context from which the co-op evolved (e.g. circumstances: historical, geographical, economic, social, cultural)

Vision / Purpose / Goals

- What is the vision statement of the co-op?
- What is the mission statement?
- Why was the co-op model chosen? What are the benefits of the model?
- What are the benefits of organising the co-op to the local and outlying communities?
- What are the benefits of organising the co-op to the co-op sector?
- How does/will the co-op define and measure success?

Starting the Co-op

- Who are/were the people involved? What were/are their skills?
- Was their an existing group or organisation upon which the co-op is being/was built?

- What financial resources were available to begin with? What sorts of funding did the co-op ask for/receive.
- Was more funding needed? How was this dealt with?
- What resources were/are available in the community (e.g. government , private, community, non-profit)
- Did the co-op use professional developers / facilitators / educators? What was their specific role?
- What obstacles is the co-op encountering in its development?
- What obstacles did the co-op encounter? What obstacles has it overcome/not overcome?
- What sorts of things/activities have helped to facilitate the co-op's development?
- What ideas and plans does the co-op have regarding growth strategies.
- Does the co-op have a business plan in place? Were any feasibility studies done? What on?

Organisational Structure / Model used

- How is the co-op organised? Is it developing its own structure? Is it following a model suggested by someone else?
- How are decisions made: Consensus vs. majority rules?
- What is the composition of the Board. How is representation determined? Are there any special provisions made regarding the board?
- What are the specific board positions?
- What is the role of the board?
- What is the role of the co-op staff? (are they paid or unpaid)
- What is the role of the co-op members?
- What are the expectations regarding volunteering? Are there volunteers?
- How does management ensure member participation in co-op decisions
- Has there been changes in the co-op's structure over time? If so, what were the reasons for these changes in structure?
- What is the share purchase price? What types of shareholders are there?

Links to Community / Network / Outreach

- Does the co-op have formal links with the community? (e.g. bank at credit union, special projects, affiliations, etc.)
- What are the particular opportunities for member involvement (AGM, special events, work, etc.)
- Is the co-op involved in any philanthropic activities? (donations, scholarships, sponsor events, etc.)

Future Plans

- What are the co-ops short-term goals? What are its long-term goals?

- Is the co-op anticipating any challenges?
- Does the co-op have plans for expansion, for example, to increase its membership, to widen/narrow its activities?
- What are the specific threats to the co-op's sustainability (e.g. financial / funding concerns, lack of community support)

Lessons learned

- What lessons has the co-op learned in starting / organising / running a co-op?
- What advice do members of the co-op have for others about starting/organising/running a co-op?