

ANSER-ARES

Association for
Nonprofit and
Social Economy
Research (ANSER)
l'Association de
recherche sur les
organismes sans
but lucratif (ARES)

*Organizing for our
Future: An On-going
Four Year Forecast
Framework*

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Summary of Recommendations

It is recommended that the following be the strategic priorities for ANSER for the period 2012-2013:

1. Improve the governance of the organization by formalizing board and committee roles and expectations and attracting high quality members to the board (Governance Committee).
2. Improve sustainability by:
 - a. Developing a fundraising plan which would include the following components
 - Obtain charitable status in order to offer tax benefits to donors (Governance Committee)
 - Seek grants and donors for named awards and prizes (Fundraising Committee)
 - Ensure the continuation of the student awards through Mount. Royal or alternative providers (Fundraising Committee)
 - Seek subsidization for the journal from SSHRC at the next opportunity or some other funding source (Fundraising Committee)
 - b. Expanding membership and conference participation by increasing and improving methods of building awareness among the following target groups: graduate students; faculty in traditional disciplines with an interest in nonprofit and social economy research; practitioners and consultants in our fields. (Administration Committee)
3. Improve the value of the organization to its members by increasing and improving the services we offer (e.g., the newsletter and conference, potential application of social media, etc.). (Newsletter and Conference Committees)

Background

ANSER was initiated by an activist organizing group in the fall of 2007, enlarged into an executive committee in the summer of 2008, and now is an incorporated nonprofit organization with a functioning board of directors and more than 110 members. The organization has been able to move ahead because of the energy of the organizers and board and because of the commitment of its members.

An annual conference has been organized each year since 2008 as part of the Congress of Humanities and the Social Sciences. These conferences have been well attended, with at least 100 registrants each year. In addition, a website (<http://www.anser-ares.ca/>) has been established, graduate student awards and theses awards have been developed, an on-line, open-access, peer-reviewed, dual language journal (Canadian Journal of Nonprofit and Social Economy Research or ANSERJ) is in its third year, and on-line association membership is available to those who don't attend the annual conference.

There are also important subsidies that have helped in addition to the tremendous volunteer effort by ANSER board members: the generous donation of a portion of Peter Elson's time through the Institute for Nonprofit Studies, Mount Royal University; the financial support from Mount Royal; and support through various social economy grants such as from the Social Economy Centre, University of Toronto, and the Social Economy Hub. The social economy grants have ended and it is unclear whether anything similar will kick in. Similarly, Mount Royal's ongoing support is unclear.

ANSER's has a working board involving members taking on helping roles: conference, journal, newsletter, bylaws, treasurer, minutes, etc. ANSER has moved ahead because of board energy and will continue to grow because of it. We have to reinforce that norm.

ANSER Board of Directors (2013-2014)

Olakunle Akingbola	Lakehead University	
Denyse Côté	Université du Québec en Outaouais	
Gloria DeSantis	University of Regina	
Edward (Ted) Jackson	Carleton University	
Donna Losell	University of Toronto	(Treasurer)
Rachel Laforest	Queen's University	
Laurie Mook	Arizona State University	(Secretary)
Ana Maria Peredo	University of Victoria	
Jack Quarter	University of Toronto	(President)
Sherida Ryan	University of Toronto	
Sébastien Savard	University of Ottawa	
Lynne Siemens	University of Victoria	
Luc Thériault	University of New Brunswick	(Vice President)
Shirley Thompson	University of Manitoba	
Marcelo Vieta	University of Toronto	

Strategic Plan Framework: A Working Document

Mission

ANSER has created a Canadian forum for the active and collective exchange of nonprofit and social economy research.

ANSER is a Canadian association for those who have an interest in research that pertains broadly to nonprofit organizations and the social economy and which seeks to promote the development and application of our knowledge for the benefit of Canadians and others in collaboration with those working in the nonprofit organizations and the social economy.

Vision

ANSER strives to be a leading Canadian voice and forum for promoting the value and exchange of nonprofit and social economy research.

Values

ANSER is guided by values that inform the way we act and the decisions we make:

- collaboration
- respect
- inclusiveness
- quality
- transparency

Goals

ANSER is working to:

- build a collaborative community of scholars and researchers; and
- develop a Canadian body of knowledge that encompasses such fields as social enterprise and entrepreneurship, community economic development and organizing, nonprofit management, volunteering, philanthropy, co-operatives, social and environmental accounting, government/voluntary sector relationships, social movements, citizen engagement, and civil society.
- build a membership that embraces a variety of scholarly fields including economics, history, law, business and management, education, psychology, political science, public administration and sociology.
- work collaboratively with other associations with complementary interests and goals.

Governance

Incorporation

Vic Murray and the governance committee have made bylaws and incorporation their focus and we are federally incorporated as a nonprofit organization. Our application for a charitable registration is pending.

Recruitment

As existing board members have moved on, we have had to recruit new people who will maintain a good regional, gender and cultural mix, and even more so to put energy into the tasks at hand. At the same time, this process represents an opportunity to enhance the transparency and democratic activities of the association.

ANSER Conference

The conference presentations make it clear that ANSER is a coalition of interests from many disciplines relating to the overarching theme of nonprofits and the social economy. The Carleton, Concordia and Fredericton conferences each have had registration of about 150. Given the end of the SSHRC social economy funding, we will have to work hard to sustain our registrations at the levels of the first five years. We feel that we have to continue to give out signals that we want ANSER to be a broad coalition and make researchers who are related feel welcome. Areas for possible expansion are the social economy network in Québec, the community economic development network in Manitoba and other parts of Canada, and researchers in community organizations.

We are currently attempting to build a membership base which goes beyond conference attendance. Although some people may want to join for solidarity reasons, most will want services in exchange for the fee – journal, newsletter, access to research grants from Mount Royal, student awards. We have to work at trying to build those services.

Conference: We feel that we should stay with the Congress, even though it may take us to places that would be less likely to draw our maximum participants. There are practical advantages to the Congress in organizing that would be challenging for a group of our scale and without paid staff. Although we have had assistance from paid students, the bulk of the labour is from board members, and it appears that we will rely on this type of arrangement over the coming years.

Communication

Journal

The journal has gotten off to a successful start and is completing its third year. Important contributions to this success have been the generous time commitment from the editors, Peter Elson and François Brouard, and the book review editors JJ McMurtry, Luc Thériault and Louise Briand, financial support from Mount Royal and the Social Economy Centre, University of Toronto, and finally, the preferred price from the Online Publishing Program at Simon Fraser. We are producing two issues per year. We hope that we can be successful with SSHRC funding in 2014, and possibly expand the journal to a quarterly. We should also consider applying for foundation funding, if we can identify suitable organizations.

Newsletter

The newsletter has published semi-annually for two years, thanks to board members who have taken on this job: at present, Shirley Thompson and Lucie Dumais; and previously, Gloria DeSantis, Sherida Ryan and Jean Marc Fontan. We have agreed to continue with this activity in English and French, meaning that we need editors for both languages.

Listserv

The ANSER listserv has been functioning for three years. Notification of such items as events and books are to be sent to anserlist@gmail.com. Announcement of use of the list by members needs to be circulated. Screening criteria for inclusion are: a) relevance to members; b) timeliness; c) accuracy.

Membership Recruitment Plan

The Administration Committee continues to work at marketing/outreach strategies to grow the ANSER-ARES membership base. As in previous years, the Administration Committee sends a letter/invitation (see Appendix 1) and our most current newsletter out to relevant organizations/networks on their contact lists. The Administration Committee is monitoring the effectiveness of this strategy.

Grants and Awards

Research Grants

Mount Royal University generously funds modest semi-annual research grants for nonprofit and social economy researchers.

Student Awards

At the U of New Brunswick conference in 2011, we have started granting a best thesis award, both for Master's and Doctoral. These awards will be continued annually.

Distinguished Service Award

At the Concordia conference, ANSER granted a Distinguished Service Award for the first time, and will likely grant this award in the future.

Other Awards

At the Victoria conference in 2013, awards will be given for the first time for the best journal article in the *Canadian Journal of Nonprofit and Social Economy Research* and the best book related to nonprofit and social economy research.

Resources

We are moving ahead but also facing uncertainties. That's true of all organizations and even more so for organizations that aspire to take on new challenges. We have been able to net between \$7,000 and \$12,000 from each of our conferences in the past. It is still premature to know whether significant additional income can be raised from memberships apart from the conference. In addition to expenses directly related to the conference, we also have a predictable set of expenditures: membership in the Congress, website administration at Mount Royal. At present, there are separate expense accounts for the journal and student research awards that draw upon grants from Mount Royal and social economy organizations (see Appendix 2, courtesy Elizabeth Hicks, ANSER Treasurer). However, unless we can obtain grants for the journal, we will probably have to utilize general revenue, so there is a need to be cautious and continue to build our balance. We should also be aware that in addition to the labour contributions from board members, there are expenses that are absorbed by other organizations (for example, conference calls, assistance with conference communication). **Therefore, we should consider a fundraising strategy and to that end create a committee with a set of priorities.** The following are assumptions and recommendations that may guide that plan:

- The board will continue as an operational board, thereby absorbing a portion of the labour cost
- Greater effort will be made to engage non-board members in committees and operational tasks
- Conference registration and membership will vary with conference location and other circumstances
- At minimum, the current level of conference administration support funds will be required
- Funds in support of the administrative functions (website, membership recruitment) will be required, at minimum, at the current level
- ANSERJ will produce two issues a year and will require additional funding beyond 2013
- Regular website updates will be required
- The List serve and newsletter will continue, but reflect production capacity
- As we approach completion of current funding agreement for student awards, every attempt will be made to either renew the funding or obtain additional funding.

APPENDICES

ANSER-ARES

Association for Nonprofit and Social Economy Research

January 2013

ANSER OFFICERS

Jack Quarter, University of
Toronto (President)

Luc Thériault, University of
New Brunswick (Vice
President)

Laurie Mook, Arizona State
University (Secretary)

Elizabeth Hicks, Mount St.
Vincent University
(Treasurer)

BOARD MEMBERS

Denyse Côté, Université du
Québec en Outaouais

Rachel Laforest, Queen's
University

Gloria DeSantis, University of
Regina

Lucie Dumais, Université du
Québec à Montréal

Edward (Ted) Jackson,
Carleton University

Olakunle Akingbola,
Lakehead University

Vic Murray, University of
Victoria

Sherida Ryan, University of
Toronto

Lynne Siemens, University of
Victoria

Sébastien Savard, University
of Ottawa

Shirley Thompson, University
of Manitoba

Ex-Officio members:

Francois Brouard, Carleton
University;
Peter Elson, Mount Royal

Dear Colleagues,

You are warmly invited to join the Association for Nonprofit and Social Economy Research – L'Association de recherche des organismes sans but lucratif et de l'économie sociale – a young, cutting edge Canadian organization!

We offer our members:

- reduced registration fee for our annual conference - **our sixth annual ANSER-ARES conference is being held at the University of Victoria, June 5-7, 2013.**
- information about recent book releases and cutting edge research in Canada
- opportunity to network with researchers and find answers to your research questions
- free access to the Canadian Journal of Nonprofit and Social Economy Research
- e-alerts about upcoming conferences and seminars
- our biannual newsletter
- links to other research sites

We are a registered Canadian association for those who have an interest in research that pertains broadly to nonprofit organizations and the social economy. ANSER is working to:

- build a collaborative community of scholars and researchers; and
- develop a Canadian body of knowledge that encompasses such fields as community economic development, philanthropy, nonprofit management, volunteering, social and environmental accounting, government/voluntary sector relationships, co-operatives, social movements, citizen engagement, and civil society.

Our interests range from the theoretical to the applied. We have come together to promote the development and application of our knowledge for the benefit of Canadians and others in collaboration with those working in the nonprofit sector and the social economy.

Please visit our website, www.anser-ares.ca to learn more about our annual conference, our new online Canadian Journal, and our student awards. If you have any questions, please send us an email at anser.ares@gmail.com. Don't hesitate to pass this information along to others in your networks. We look forward to having you join us!

Sincerely,



Jack Quarter, President



Gloria DeSantis, Membership

Appendix 2

ANSER / ARES Budget – General Fund 2011 – 2015

ANSER / ARES - GENERAL FUND	2011	2012	2013	2014	2015
	Actual	Actual	Projected	Projected	Projected
REVENUES AND CONTRIBUTIONS					
Conference (net) (notes 3 and 4)	8,960	6,663	4,800	6,000	6,000
Membership fees (notes 2, 3 and 4)	1,630	1,605	1,650	1,650	1,650
Interest revenue	170	460	450	450	450
Total revenues	10,760	8,728	6,900	8,100	8,100
EXPENSES					
Administration					
Website upgrades and updates (note 5)			500	500	1,500
Membership processing (note 6)	33	34	35	35	35
Translation (note 5)		45	500	500	500
Support staff- Student (note 5)	2,744	1,207	1,500	3,500	3,500
Printing and office supplies (note 1)	87	28	30	30	500
Contingency (note 7)			500	500	500
Administration Subtotal	2,864	1,314	3,065	5,065	6,535
Governance					
Committee Meetings (note 1)					2,000
Not for profit regulatory fees	30	30	30	30	30
Financial review / audit (note 8)	230	575	575	575	575
Governance Subtotal	260	605	605	605	2,605
Total expenses	3,124	1,919	3,670	5,670	9,140
Excess of revenues over expenses	7,636	6,809	3,230	2,430	- 1,040
General fund balance - Jan. 1	21,355	28,893	35,485	37,915	39,245
Transfer to Journal Fund	- 79	- 113	- 550	- 250	- 250
Transfer to award fund	- 19	- 104	- 250	- 850	- 850
General fund balance - end of year	28,893	35,485	37,915	39,245	37,105

ANSER / ARES JOURNAL FUND	2011	2012	2013	2014	2015
	Actual	Actual	Projected	Projected	Projected
GRANTS AND OTHER REVENUES					
Grants (note 9)	6,000	12,000		6,000	6,000
EXPENSES					
Production (note 10)	10,000	7,500	11,000	11,000	11,000
Promotion			50	50	50
Translation	79	113	500	200	200
Total expenses	10,079	7,613	11,550	11,250	11,250
Excess of revenues over expenses	- 4,079	4,387	- 11,550	- 5,250	- 5,250
Journal fund balance, Jan. 1	23,500	19,500	24,000	13,000	8,000
Transfer from general fund	79	113	550	250	250
Journal fund balance end of year.	19,500	24,000	13,000	8,000	3,000
ANSER / ARES AWARD FUND					
	2011	2012	2013	2014	2015
	Actual	Actual	Projected	Projected	Projected
GRANTS AND OTHER REVENUES					
Grants (note 9)	7,500	12,500		5,000	5,000
EXPENSES					
Award recognition	19	104	250	250	250
Graduate student awards (note 11)	5,000	5,000	5,000	5,000	5,000
Award panel honorarium (note 12)				600	600
Travel - award recipients (note 11)	1,247	2,876	2,500		
Total expenses	6,266	7,980	7,750	5,850	5,850
Excess of revenues over expenses	1,234	4,520	- 7,750	- 850	- 850
Award fund balance Jan. 1	2,380	3,633	8,257	757	757
Transfer from general fund	19	104	250	850	850
Award fund balance end of year	3,633	8,257	757	757	757
Total fund balances end of year	52,026	67,742	51,672	48,002	40,862

Notes and assumptions:

1. ANSER benefits from in-kind contributions for teleconferencing and printing in the amount of approximately \$2,000. We assume in kind contributions for teleconferencing will end in 2015
- 2: The student member category includes students, retired members and non-salaried members.
3. Assumes that membership and attendance at the conference will be approximately 100 participants.
4. Assumes membership fees will not change over the 5 years.
5. On September 15, 2010 the Board approved \$3,500 per annum for student support (web, journal and membership); \$500 per annum for translation; and \$500 per annum for website updates. A major update to the website is anticipated in 2015.
6. PayPal charges approximately 3.5% for memberships collected through PayPal. This is based on approximately 10 memberships being paid for using PayPal.
7. \$500 has been reserved for unexpected expenditures beginning in 2012. Such expenditures are subject to approval by the Board.
8. The Board has approved an audit fee for reviewing the financial statements for 2011 of \$575 (\$500 plus HST). This is assumed to be constant until 2015.
9. Funding from the Institute of Nonprofit Studies, Mount Royal University for graduate scholarship awards and the ANSERJ will be discontinued 2013. Funding for 2013 was received in 2012.
10. Simon Fraser CCSP Press has agreed to produce the journal for \$5,500 per issue (\$11,000) for 2013. Assuming no additional funding is secured by 2015, the journal will require funding from general revenues. In addition general revenues will be needed to cover translation and promotion of the journal.
11. Unless additional funding is secured to support the awards in 2014, financial awards and travel to the annual ANSER conference will no longer be awarded.
12. Per Board of Directors minutes April 9, 2013.