

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

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

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

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

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

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

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

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### Introduction

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

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

### Organizational identity

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

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

**Figure 1: Paradoxes of Identity**

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

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

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

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

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

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

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

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

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

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

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

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

## 2. The Development of Expertise in the Teaching of Cooperation

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

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

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

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

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

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

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

### 3. A Period of Great Change

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

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

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

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

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

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

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

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

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

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

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

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

#### 4. A Marked Passage towards Local Development

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

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

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

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

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

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

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

### 5. The Time for Questioning

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

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

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

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

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

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

### Current Situation, Challenges and Possible Solutions

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

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

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

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

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

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

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

## Conclusion

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

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

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### Notes

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

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