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# Between a Rock and a Hard Place? Exploring the Strategic Tensions Experienced by Development Trusts

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Neil Stott  
Keystone Development Trust & Brunel University

Paul Tracey  
University of Warwick

## Abstract

Development trusts are not for private profit organisations located in a defined area, usually within the most deprived communities of the United Kingdom. Trusts aim to achieve social and economic regeneration through creating wealth and opportunity and keeping returns within the community. Trusts can be seen as a 'hybrid' organisational form, combining social outcomes with wealth creation'. Attempting to fuse these goals or *organisational purpose* has highlighted tensions with respect to *process issues*, *content issues* and *context issues*. This paper examines the emerging literature on social enterprise and development trusts using a conceptual framework derived from Ketchen *et al*'s (1996) seminal paper on strategy. It discusses empirical evidence from four trusts which suggests that purpose and context (place) create a 'dominant tension' and a series of factors which inhibit or support organisational purpose. It is concluded that deprived places can create competitive advantage but rarely sustainability. As 'corporate parents', trusts' social and commercial projects should be mutually reinforcing and aimed at creating a mixed income stream. Trusts should not confuse beneficiaries with customers, and should seek relevant markets beyond their boundaries. Organisationally, the split between social and business ventures into a charity and trading company is a well tested strategy for managing the tensions inherent in the development trust model.

## Introduction

Development trusts are independent, not for private profit organisations located in a defined area or community. Trusts aim to achieve social and economic regeneration through the creation of wealth and opportunity, and to keep social and financial returns within the community. The majority operate within the most deprived communities in the UK. Since the 1970s, the creation of a trust was a localised (micro) response to macro social and economic change. The emphasis was on achieving economic stability and a 'buffer' between the local and the global through community control and ownership of capital (Imbroscio *et al*, 2003). Until the mid 1990s the movement was relatively marginal to national policy, and arguably had a mixed record of achieving social and/or economic goals. Subsequently, driven by national policy, regeneration resources and heightened expectations about their contribution to wealth creation and social benefits, trusts were perceived as a viable strategy in localities with acute deprivation to provide long term renewal<sup>1</sup>. Development trusts can be seen as a 'hybrid form of organisation, combining social outcomes with wealth creation' (Tracey *et al*, 2004), and which attempt to blend the strategy and culture of the private, public and 'traditional' non-profit sector (Pharoah *et al*, 2004). Attempting to fuse these goals or *organisational purpose* and cultures has highlighted tensions and debate around process issues (who decides), *content issues* (what to do) and *context issues* (social and economic conditions) (Tracey, 2004).

Drawing from research on four UK trusts (Stott, 2005), this paper focuses on the tensions created by attempting to deliver a 'fused' organisational purpose within the context of deprived places. The paper examines the emerging literature on social enterprise and trusts within a conceptual framework derived from Ketchen *et al*'s seminal 1996 paper on strategy. It then discusses empirical evidence which suggests that trust's purpose and context (place) create a '*dominant tension*', and considers the factors which inhibit or support their capacity to achieve organisational purpose.

## Dimensions of Strategy

Ketchen *et al*'s (1996) key paper provides a conceptual framework for understanding strategy. Following Pettigrew and Whipp (1991) the authors argue that the traditional dichotomy of process and content in strategic management theory does not fully explain organisational performance -

<sup>1</sup> Since 1995 the membership of the Development Trust's Association (DTA) has tripled to 300, with a combined annual income in 2003 of £190 million and assets of £232 million (DTA, 2004).

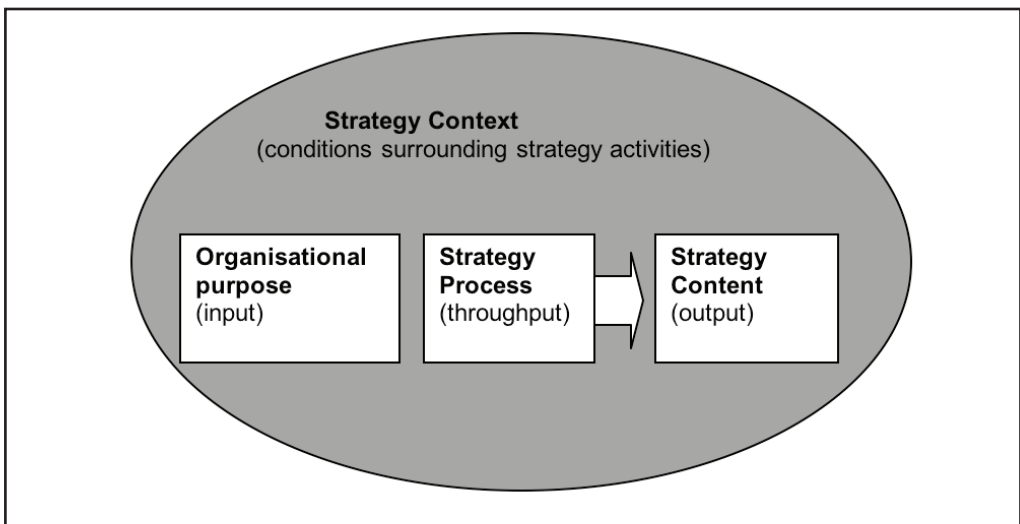
context is also a crucial consideration. Process, content and context are clearly distinguishable dimensions of strategy, applicable to all organisations and the synergy between them affect performance.

- *Strategy process* focuses on how strategy is developed, who is involved and the timing of activities (formulation) - 'the activities leading to and supporting strategic decisions' (Ketchen *et al*, 1986:231). It also includes how decisions are enacted, monitored and adapted (implementation).
- *Strategy content* focuses on the product of the processes or what is decided: the purpose/goals and competitive strategies.
- *Strategy context* focuses on where the above are embedded; 'the characteristics of the environment and how it impacts upon organisational behaviour' (Tracey, 2004) and choices.

De Witt and Meyer (2004) add organisational *purpose* as a fourth dimension, reflecting important debates on what organisations are for, how they should adjudicate between competing stakeholder interests, and their broader societal role and responsibilities;

*'Making strategy is not an end in itself, but a means for reaching particular objectives. Organisations exist to fulfil a purpose and strategies are employed to ensure that organisational purpose is realized.*  
(2004: 6).

Organisational purpose is expressed as a mission or fundamental principles, which are built through the inter-relationship of senior managers, boards and stakeholders (governance) and attitudes towards profit and responsibility. Within each dimension 'a fundamental tension between apparent opposites can be identified (De Wit and Meyer, 2004:13) which 'condenses debate into its most powerful form - two diametrically opposed perspectives are confronted with each other' (2004:17).



### Strategy and Development Trusts

A clearly defined strategy is a pre-requisite for organisational legitimacy and access to capital across all sectors. Models of strategy are usually derived from corporate management theory, and there has been no substantive contribution to the strategy discourse from development trusts or

the wider social and community enterprise sector. While sustained policy interest in social enterprise has led to a recent growth in research, much of the literature consists of 'good practice' examples, 'snap shot' case studies (Pharoah *et al*, 2004) and the personal characteristics of 'social entrepreneurs' (Lyon *et al*, 2004). Development trusts are portrayed as a distinct model which is widely replicated, yet there is virtually no literature or research into their strategic development.

### Organisational Purpose

The Development Trust's Association definition is commonly accepted as the organisational purpose of development trusts in the UK.

'Development trusts are:

- Engaged in the economic, environmental and social regeneration of a defined area or community;
- Independent and aiming for self-sufficiency
- Not for private profit
- Community based and owned
- Actively involved in partnerships between the community, voluntary, private and public sectors' (2004a)

According to the DTA, its members share this common organisational purpose; therefore trusts are a distinct model and 'brand' (2004b). Smallbone *et al* suggest that trusts have a 'holistic approach implicit in their development model' which 'approximate the role of what Pearce (1993) envisaged for a 'core community enterprise' in the creation of a community economy' (2001:21).

Achieving clarity of purpose is important in communicating strategic position and intentions. For the DTA it appears to be a pragmatic response to maintaining a niche within the burgeoning service market created by intense policy interest in social enterprise. It also reflects the movement's original ideological commitments to 'local' or community control and a 'post- public' form of common ownership, fused with a contemporary emphasis on the 'enterprise culture' and 'combining community-led action with business expertise' (DTA, 2004a).

While the scale and scope of trusts vary, within the movement there is a commitment to the aspirations enshrined in the DTA's definition and a distinct range of activity such as community, economic and asset development. While the evidence is primarily based on promotional literature, it clearly appeals as a model with the DTA's membership rising from 50 in 1992 to 300 in 2004 (2004a). The reasons why the model is proving popular are not clear, but may include ideological and practical drivers.

For Amin *et al* (2002), the ideological drivers behind social enterprise include utopian co-operatism, communitarianism and a predominantly neo-liberal focus on the individual, the primacy of the market, downsizing the role of the state, and resulting socio-economic change. Social enterprise is simultaneously a reaction to change and 'sanctioned' by the dominant socio-economic ideology of contemporary capitalism. Practical drivers may include community responses to change coupled with policy driven financial incentives - funding, asset endowments or recently, community and statutory partnership responses to change and the funding environment (Stott *et al*, 2004). Trusts combine pragmatic responses to the policy/funding environment with an attempt to fuse a 'historic' ideological perspective to a dominant 'entrepreneurial' perspective.

Increasingly social enterprises and development trusts are being described as organisational 'hybrids' because of the fusion of social and wealth creation goals (Tracey *et al*, 2004) and

'blending' of the public, private and non-profit (traditional charity) sectors (Pharoah *et al*, 2004). Patton suggests that social enterprise hybrids 'combine elements that we think as dissimilar or dissonant' (2004:3) and their 'defining feature...is that they are hybrid organisations, pursuing social and economic goals together' (2004:7). Recent research suggests that being a hybrid can be simultaneously benefit and hinder social enterprise (Smallbone *et al*, 2001). For Pharoah *et al*, being a hybrid can lead to innovation, opportunity and growth, but also to 'inherent tensions and contradictions' (2004: vi). Patton argues that the sector provides 'institutional renewal of the public domain' (2004:3), but by having to survive both the commercial and public environments faces 'conflicting imperatives' (2004:10). The fundamental tension highlighted is in achieving social *and* wealth creation goals, and yet:

*'To suggest that there are tensions between the social and economic is to go against the grain of much social enterprise literature, in which social return and economic return are sometimes portrayed as a sort of 'peaches and cream' combination.'*  
(Pharoah *et al*, 2004. 29)

The organisational purpose of trusts clearly combines social and economic goals, and it can be argued that this builds in an *inherent tension* which impacts on all aspects of strategy development and management. This inherent tension reflects the debate crystallising around two models. The '*social business model*' emphasises wealth creation, building markets and competitive advantage (DTI, 2002). The '*community model*' focuses on participation, the importance of place, social outcomes and community capacity (Pearce 2003). The former concentrates on engaging with the market on its own terms to achieve *self sufficiency* (as distinct from 'grant dependency') to cross subsidise social activity, or by creating businesses to achieve social outcomes such as job creation (Boschee and McClurg, 2003). The latter on achieving *sustainability* through generating a mixed income stream (for instance trade and grants), recognising the socio-economic context in which many community enterprises operate significantly hampers financial viability.

The sector could be characterised as an *uncomfortable hybrid*, because it attempts to give equal weight to financial and social aspirations which may be incompatible, or focuses on one. The discomfort, and resulting ambiguity, seems to stem from reactions to two interlinked issues. First, increasing convergence or '*institutional isomorphism*' between the private, public and the third sector. Second, an emphasis on social enterprises achieving self sufficiency through engaging competitively in the market place, or *ideological isomorphism* (DiMaggio and Powell 1983).

Patton detects convergence towards private sector values, strategy processes and methods driven by a policy discourse which gives a high value to models derived from the private sector (2003:33). The private sector is perceived as the most effective mechanism for creating wealth and opportunity. Organisations dependant on or regulated by the state are increasingly expected to apply models and methods derived from the private sector by informal promotion or formal funding conditions (Llewellyn and Tappin, 2003:956). Social enterprises tend to adopt social business models to mimic the perceived success of others who advocate the model and are heralded in the policy literature (DTI, 2002). As the sector has grown it has attracted professionals who want to legitimate their role and organisations by playing the 'dominant' game. The dominant game seems to be achieving self sufficiency through competition.

While development trusts have been portrayed as a model with the *potential* to generate an innovative synthesis (Smallbone *et al*, 2001) there is very little substantive evidence on how this tension is tackled or for the widespread achievement of the *holistic organisational purpose*.

## Place

Most trusts are located within communities of *place* which experience deprivation. The creation of a trust is frequently a response to local social and economic problems resulting from macro changes. Trusts often aim to ameliorate the social and economic effects of change, to stabilise local economies (Imbroscio *et al*, 2003) and gain a degree of control over 'global' forces (Leeming, 2002). Development trusts are often conceptualised as 'embedded' within communities and their prime purpose is to tackle local issues (Tracey, 2004a). Indeed many are 'bounded by place' through their charitable area of benefit/constitutions. For the DTA this means creating and anchoring opportunity, services and wealth - underpinned by a commitment to local people steering community 'transformation' through 'self-help' (2003).

The debate between advocates for the community and social business models highlights place related tensions. The community model emphasises the relationship between place and social/community enterprise and 'the responsibility to focus and respond to local needs' (Stott *et al*, 2004:24). For Pearce (2003) this includes building democratic and accountable organisations which hold assets in trust and develop *local* community services and markets. The social business model suggests that a purely local focus is economically unfeasible. To generate sufficient surplus to fund social aims requires engagement in wider markets (Tracey 2004). This is particularly pertinent in areas of deficient demand; localities where many residents are unable to pay for products or services which the private sector is unable to make a profit, and the public sector is unwilling to subsidise. In the US, Community Development Corporations (CDCs - the early model for development trusts) often expanded their areas of benefit to include more affluent areas to financially survive, or engaged in wider markets (Halpern, 1995).

## Process, Content and Context

While this paper focuses on purpose and place, the table below illustrates the strategic challenges process, content and other context tensions present to trusts.

<b>Process</b>	• Governance - community/participatory v business models
	• Multiple stakeholders and accountabilities
	• Community/ entrepreneurial cultural differences
	• Capacity - expertise (Board & staff), access to finance for capacity building
<b>Content</b>	• Goal compatibility - community/market building
	• Emphasis - social capacity or profit maximisation
	• Position - private, public or third sector orientation?
<b>Context</b>	• Policy
	• Position - engaging with three worlds; public, private, third sector, lack of understanding of the model
	• Socio-economic

## The Research

The research adopted a multiple case study approach to generate theory on how trusts experience strategic tensions, and the key factors which support or inhibit the achievement of organisational purpose. The research built on a conceptual framework of strategic dimensions and tensions outlined above and an '*a priori specification of constructs*' of potential importance drawn from the literature. Four established trusts were selected as part of a multiple embedded case study design. Four internal and external actors from each were interviewed, and internal and external documentary evidence was gathered. Following a content analysis of the data, a within case and cross-case analysis was conducted.

### Awkward Realities

The research provides new evidence on a relatively un-researched model, and confirms the existence of the tensions highlighted in the literature. While published strategies tended to gloss over the 'awkward realities' (Patton, 2004:37), and focus on 'headline' mission and objectives, all interviewees were clear on the strategic *direction* of the trusts, the tensions generated by the DTA model, and (to varying degrees) had taken action or planned to take action to overcome / balance tensions. However, most of the plans were untested or 'works in progress', particularly with respect to achieving financial goals. The data show that the DTA model creates tensions; while all the strategic dimensions 'interact and overlap' (Ketchen *et al*, 1987), *the crucial tension is in achieving dual goals compounded by the limitations of place*. This combination impacts on all aspects of the trusts' strategy.

Although specific factors (such as location, history and scale) influence the *detail* of the trusts' strategy, the similarities between strategic *directions*, critical awareness of the tensions and proposed 'solutions' are significant. The main differences lay in the emphasis on *particular* tensions. Separate trusts reaching similar conclusions does not necessarily mean that the 'solutions' will achieve intended goals. The strategies express aspirations, are predominantly untested and driven by a combination of 'received knowledge' from 'flagship trusts', changes to funding regimes, and reactions to public policy shifts; in other words, mimetic, coercive and ideological isomorphism (DiMaggio and Powell, 1983). This would suggest that the social business model was in the ascendancy. However, the evidence points to the trusts' attempting to *fuse* the aspirations behind the community/ social business models, but *separating* the implementation; the charity primarily delivering social goals, trading units/arms focusing on commercial goals. This can be conceptualised as a *pragmatic separation* of functions to overcome tensions, but also a *reciprocal relationship* rather than a new form of 'dependency'; the charity assists the trading arm with achieving competitive advantage in a 'public market' in return for a profit share.

### Pragmatic for Purpose

It is not surprising that all of the trusts have similar organisational purposes having adopted the DTA model, the 'operational context' (12)<sup>2</sup> and commitment to deliver local holistic solutions to socio-economic problems. The trigger in all the cases is the perceived threat to the 'natural feeding grounds' (5) of the third sector (grants) and 'reading the policy runes' (14) which privileged social entrepreneurship over grant dependency.

All interviewees expressed qualified enthusiasm for the model as the current 'best bus in town' (7). All recognised the tensions created by dual goals, the dangers of 'over-hyping' the model (14), and the gap between intended and realised strategies. All emphasised the *potential* for a social entrepreneurial approach in creating opportunity, stabilising (and control over) local economies, and 'freedom' of earning 'unrestricted' income (14).

In adopting the model, all trusts experienced significant change; initially constitutional and governance arrangements. The *potentially transformational* changes began as trusts worked through the implications of achieving dual goals within deprived areas and current policy framework. Each trust took similar decisions on strategic direction, content, structures, operational models and experienced similar process tensions and reactions from other organisations.

To achieve social goals three of the four trusts recognised the need to subsidise social projects through developing a mixed income stream of grants, contracts, assets and enterprises. All saw the

2 The numbers refer to interviewees.

public or policy driven market place as a key source of income, and their community roots, local knowledge and holistic approach to economic activity as a key source of competitive advantage.

Asset development is central to all trusts aspirations, primarily as an income generator but also as a space for innovation. All were wary of being gifted 'liabilities' such as community centres. All saw assets as a related diversification opportunity; developing expertise and capacity through 'internal markets'.

Most trading activity (actual/proposed) is either related to assets, extension of social 'business' or 'intangible assets'. All sought wider markets or targeted affluent areas/customers, often outside the areas of benefit. All combined social aims as well as generating surplus in enterprises. Most [all??] had separated, or intended to separate, charitable/trading activity - although kept elements of 'primary charitable purpose' income generation/enterprises within the charity. The 'internal trading' mechanism was seen as a key means to mutually reinforce activity and cover central services (finance, HR etc).

The trusts' social performance backed by public funds currently outstrips commercial performance. The trusts change management processes and 'rehearsals' (such as related diversification driven by internal trading) focus on the latter, but recognise that competitive advantage in their key market (the policy driven market place) is derived from the skills, knowledge and trust engendered by sustained community engagement/ service delivery.

The starkly contrasted social business/community models may not be adequately nuanced to development trusts who appear to be applying the latter to trading units/arms and former to the charities.

### **Being Pragmatic About Place**

Being 'rooted' in place was fundamental, but presented severe limitations in achieving sustainability; all had 'breached' boundaries and intended to operate within wider markets, causing ongoing tensions with local stakeholders and communities. All were extremely sensitive to the public policy environment and adapted to fit the national agenda around neighbourhood management, social enterprise and public procurement etc. All stayed close to the public market place, adopting 'a strong business ethic' (15) to compete on government's terms. There was limited evidence of sustained engagement in the 'private' market or competition with the private sector for public contracts.

### **Dominant Tension**

The data support the proposition that the dual goals enshrined in organisational purpose create an inherent tension which is compounded by place related tensions. This 'dominant tension' infuses all aspects of strategy and presents a paradox which the trusts are attempting to reconcile.

For all the trusts there is a race between refining, articulating and implementing a coherent strategy which balances social/financial goals, and possible financial crisis as a result of reduced levels of public funding. The current strategies are characterised as 'works in progress' and (following Grant, 1998) are developing experiences, concepts and models for further strategies.

### **Achieving Organisational Purpose - inhibiting factors**

Consistent with other recent research, the results of this study indicate that development trusts' organisational purpose builds in a 'dominant tension'. This is not reflected in the DTA's (or case trusts) 'public' documents. There is a danger of being overwhelmed by the 'conflicting imperatives'

(Patton, 2004:10) and pessimistic tone of much of the recent research. Equally, there is a danger of underestimating the implications of the 'dominant tension' and uncritically accepting the model as intrinsically 'peaches and cream' (Pharoah *et al*, 2004:29). The former could lead to focusing primarily on one goal which may be ultimately self-defeating, or strategic 'paralysis'; the latter leading to an 'ostrich syndrome'.

A key factor inhibiting strategic development is a 'learning myopia', engendered by isomorphic tendencies, which overlooks distant times, places and failures' (Jones, 1998:415). The US Community Development Corporations' (CDCs) experience is particularly pertinent. Described as 'a fragile and a vital strategy' (Halpern, 1995:145) but 'relatively flexible and enduring' (ibid: 127), the CDCs constantly battled with the 'dominant tensions' of dual purpose and place.

Focusing a trust purely on a deprived area seriously inhibits achieving organisational purpose. The premise is recreating 'multi-faceted, self-sufficient communities' following significant decline. The CDCs found that the 'depleted and unforgiving contexts' (Halpern, 1995:142) with 'marginal neighbourhoods with marginal populations' an extreme challenge (ibid: 145). 'Dwarfed' by context, even the well managed and capitalised CDCs struggled (ibid:136).

### **Achieving Organisational Purpose - supportive factors**

A cohesive corporate strategy is crucial to achieving purpose. The trusts' emergent 'strategic architecture' (Pralhad and Hamel, 1998:231) demonstrate a promising '*corporate configuration model*'; the key decisions lay in 'corporate composition' (scope) and 'corporate management' (organisation) (De Wit and Meyer: 2004:297). The scope can be conceptualised as social projects (community development), social enterprise (product and process)<sup>3</sup> and business ventures (profit), which mutually reinforce each other. Organisationally, the split between social/charitable projects and business ventures provides clarity and is a well tested model in large voluntary /Non-Governmental Organisations. The acid test for the location of social enterprises is profitability.

As 'brand guardian' the DTA is crucial to the development of critical strategic debate. The current literature provides 'sound bites' and 'good news stories' to entice policy makers and new members. Avoiding the 'awkward realities' may be counter-productive.

The evidence overwhelmingly points to the fragility of trusts that are focused solely on deprived areas. Trusts have attempted to scale-up in order to 'reach out' to more affluent areas or extend their area of beneficiaries. Locating contemporary trusts purely in deprived areas has more to do with the 'pull' towards concentrations of public funding and the 'push' of policy, than it has to do with community-based initiatives. Trusts would be strongly advised to balance *prime cash poor beneficiaries* with *cash rich beneficiaries* if possible i.e. encompass more affluent areas. Existing trusts could extend the area of beneficiaries to encompass the above or to other deprived areas to gain access to substantial public funds. The key is differentiating between beneficiaries and customers; beneficiaries are local, customers (individuals or organisations) potentially anywhere. Automatically equating customers with area of beneficiaries is a self-defeating strategy. Deprived places can create competitive advantage, but rarely sustainability.

### **Conclusion**

Are development trusts between a rock and a hard place? This paper suggests a qualified 'yes'. Beck's comments on contemporary change encapsulate the research findings;

<sup>3</sup> Such as furniture recycling (product) or training orientated (process). Arguably, doing social/environmental good can bring extra costs. These costs can only be met through grant, cross-subsidisation, or a social premium (like Fairtrade) products).

'we will confront profound contradictions and perplexing paradoxes; and experience hope embedded in despair.'  
(1999:1)

A bookie or investor may give a resounding 'yes' and point out that the odds of success are not in trusts' favour. As interviewee 12 reminds us 'there are real costs of doing nothing in deprived neighbourhoods'. But as Pearce asserts for social enterprise, trusts should not allow themselves to 'be boxed into the regeneration or anti-poverty corners' and 'not to be seen as relevant only to poor people, in low income, under-invested communities' (2003:57). The evidence is unequivocal; *deprived places can create competitive advantage but rarely sustainability.*

For all the case trusts the test of their strategy is when current public funding streams cease, and the dress rehearsals are over. The tensions in achieving dual goals in deprived places may never be overcome.

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