
Fit for Purpose - Board Development for Social Enterprise

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Introduction

In recent times social enterprises have been afforded a high profile by the government in the UK, as a vehicle for enabling economic and social regeneration in communities. The developing trend to offer social enterprise organisations the opportunity to bid for public sector contracts raises the question of the viability, coherence and governance of such organisations. The creation of the Office of the Third Sector under the leadership of Ed Milliband suggests that social enterprise involvement in the delivery of public sector services is perceived to be of growing importance. The theoretical landscape of social enterprise governance is emergent though steadily accumulating evidence. The thrust of governance theory for these organisations offers a number of considerations: stakeholders; stewardship and agency / institutional perspectives have been proposed. Yet, an area that needs more provision is the empirical support for the variety of theoretical approaches to social enterprise governance. This paper aims to provide some empirical evidence, considering the importance of having a Board of Trustees that is 'fit for purpose'. The central premise is: does the Board in a social enterprise have the ability to lead and manage in a complex environment balancing economic reality with social and environmental values and mission. Case study data is used to enhance understanding of the sector and the skill requirements at Board level to promote survival and sustainability.

Social enterprise in the UK

Social enterprise has risen to a level of prominence in recent times. Utilising business and entrepreneurship, they serve stakeholders and communities to satisfy overarching social objectives. The generally accepted definition follows thus: "...business(es) with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community..." (DTI, 2002, p.7). Definitions vary, though the common thread is that social enterprises exist to benefit defined communities. The social enterprise sector is currently valued at approximately £27 billion, with such organisations accounting for 1.2% of all enterprises in the country (Office of the Third Sector, 2006). Through their work, they are a potent catalyst for economic and social regeneration. Combined with their rising political capital, more people are beginning to become acquainted with social enterprises and are interested in what they, and the 'third sector' generally, can achieve. An entrepreneurial orientation distinguishes between traditional nonprofit organisations and social enterprises (Spear, 2001). Dart (2004, p.415) notes that social enterprises "...blur boundaries between nonprofit and for-profit...they enact hybrid nonprofit and for-profit activities". Non-profit organisations are restricted from using trade as a means to raise capital, making them heavily dependent on donations and grants. The entrepreneurial focus is encouraged so that social enterprises can trade and gradually become self-financing through organic growth.

In the UK, political support for social enterprise has been forthcoming. The central aim of UK Government reports has highlighted the importance of social enterprises in key areas of public policy, including the delivery of public services. This has been influenced by a reduced provision by the welfare state (in the context of the UK), and other factors such as the influence of entrepreneurship (Spear, 2001). Innovation and entrepreneurship is encouraged to meet the demand for flexible solutions to social needs, where traditional approaches have failed to account for the often unique circumstances of defined communities (Borzaga and Defourny, 2001). Social enterprises enable local communities to take direct action in providing much-needed products and services, and they fill the gaps in provision left by the withdrawal of the State. The rise of the social enterprise development encourages empowerment of local communities. Also, it supports the development of entrepreneurial activities in solving demand and supply issues where traditional approaches have failed.

The publication of government strategies for social enterprise reflects the growing influence that these organisations have upon the UK economy. An important element of this strategy is fostering an entrepreneurial culture to tackle social problems and deliver much needed services to defined communities. Social enterprises need to be flexible in finding solutions to problems in communities, and developing the management skills to create a sustainable social enterprise.

Scholarly activity has focussed on a number of facets of the social enterprise, across Europe and worldwide. One element that currently occupies an increasing level of academic attention is social enterprise governance. The strategic governance of two apparently conflicting organisational objectives is a common theme in mainstream corporate governance. In particular, arguments regarding its appropriateness in corporations is one of the major debates in the shareholder-stakeholder dichotomy. Naturally, researchers are intrigued by the nature of social enterprise governance: keen to conceptualise its mechanisms and empirically test its performance. In so doing, it contributes to the extant corporate governance literature. There are various organisation types that classify as social enterprises, including cooperatives, credit unions, Social Firms and housing associations. Given this multiplicity, there is a broad canvas from which individual strands of investigation can be pursued.

Fowler (2000) recognises that social enterprise calls for a specific type of capability to manage a profitable enterprise in a not for profit organisation. Entrepreneurial leaders in social enterprise are often able to mobilise effort from both paid and unpaid workers disproportionate to their resources (Young, 2006). The ability to relate to the entrepreneurial drive may be a struggle for Boards of directors or trustees who come from a voluntary sector or a commercial business background. This can lead to a lack of focus on the combined social and entrepreneurial goals of a social enterprise and prevent social enterprises from truly reaching their potential. The reported lack of HRM skills in the sector suggests that organisations may struggle with expertise to help them to resolve their difficulties in appointing key members of the Board (Borzaga and Solari, 2001). Indeed, the only HRM advice available may be available via voluntary Board members recruited to fill the skills gap in this area. Acquiring appropriate skills and resources may be a concern at Board level as well as at the point of delivery.

It follows, therefore, that the progression and development of individuals at Board level is linked directly to the progress of the organisation (Sisson and Storey, 2000). Organisational objectives seek quality, productivity, high levels of service and to meet these objective organisations require skilled human resources capable of performing effectively in this environment. The management and measurement of performance capability at Board level remains under researched although social enterprise organisations have recognised Board skills and Board development as an essential part of their future well-being. Having Boards that are fit for purpose requires HRM skills to identify core competencies and gaps and to select and develop Board members with the capacity to balance the complex requirements of balancing an effective business agenda with social and environmental priorities (Zappala, 2001). Boards may become stagnant over time, depriving the social enterprise of much needed skills and advice. Low (2006) suggests that Board membership may only change when Board members have proved themselves to be unable to manage the situations developing within the organisation. The extent to which skills development in Board members, staff and volunteers has been evaluated within the social enterprise sector is poorly reported as yet. However, it is an area that may prove to have a profound influence on the ability of social enterprise organisations to be effective and sustainable.

Governance and Social Enterprises

The theoretical terrain of social enterprise governance is diverse. From implicit stakeholder models of governance, much work now focuses on alternative explanations of and justifications for the way

that Boards manage social enterprises. From the stakeholder perspective, the level of involvement of stakeholders and their representation at Board level further differentiates the social enterprise organisation from other suppliers of services to the public sector. The importance of both social and environmental outcomes creates a complex environment in which stakeholder influence plays a key role in governance and, ultimately, sustainability. The central element of this view is that organisations have responsibilities to stakeholder groups, and are implicitly social entities (Parkinson, 2003). The stakeholder theory of governance attempts to explain how organisations can prioritise and manage relations with identified stakeholders (Freeman and Evan, 1990, Goodpaster and Holloran, 1994). The 'social' perspective is naturally aligned with the structure and goals of social enterprises, because they exist to serve part of society (rather than being distinct from it). Consequently, governance structures should facilitate managing the claims of the stakeholders they serve. Social enterprises are created by people who have links with the defined community they support. Hence, social enterprise governance must facilitate stakeholder benefit, as a means to continued legitimacy and existence (Mason *et al.*, 2007).

Stakeholder governance has further implications for the strategic direction of social enterprise. Stakeholder representation at Board-level is beneficial because it encourages using a broader range of sources in strategy development. Consequently, stakeholders can provide valuable input to Board-level decisions that will ultimately affect them. In allowing stakeholders direct involvement in operations, the social enterprise adopts and perpetuates a culture that resonates with the needs of that group. The recognition and inclusion of stakeholders into the social enterprise reflects the democratic and ethical tenets upon which they are founded. The degree to which stakeholder inclusion adds value to social enterprise activity must be evident to validate their involvement in Board decisions. As the social enterprise sector in the UK matures, there is likely to be enhanced competition for particular service contracts, for example in the delivery of public health services. To increase the effectiveness of the organisation, there will need to be a sufficient balance of expertise on the Board to grow. Therefore, a trade-off will be made between enabling stakeholder democracy and adapting to the demands of the market, forcing a change in philosophy at Board level. In turn, this has implications for the legitimacy of the social enterprise. The instrumentality of stakeholder theories of governance remains unclear. Although recognition of stakeholder in the social enterprise model is implicit, explanations of their governance need to account for the subtleties in relationships between managers, Directors / Trustees and primary beneficiaries. Also, the value of these relationships to maximising social benefit needs to be accommodated in the emergent theory.

Social enterprises vary in their origins and leadership. Highly participative, organically grown organisations may be part of community networks alongside autocratic organisations lead by charismatic leaders with great personal energy but also with resistance to the time and resources involved in participative management. Norris and Turner (2005) suggest three main types of leadership - transactional, transformational and inspirational but there is a lack of evidence at present about the prevalent leadership style or the most appropriate one for social enterprise. It is unlikely that one model of leadership would fit the sector overall but social enterprises would benefit from the skills to build sustainable growth and meet the development needs of employees and volunteers. For an organisation seeking to become a preferred service provider; to win public sector contracts; to expand its client base, the measurement of provision and the performance of individuals within the organisation inevitably becomes part of strategy. The balanced scorecard offers a tool for managing and guiding strategy but there has to be commitment to the process from the leaders and decision makers (Somers, 2005).

An alternative theoretical approach, stewardship theory, has been advocated as an appropriate basis of social enterprise governance (Dart, 2004, Low, 2006). Stewardship theory presents a view of governance that diverts from economic interpretation of relationships within the organisation

(Donaldson and Davis, 1991, Davis *et al.*, 1997). Moving away from issues of Board independence from managers to protect beneficiary interests, managers are conceptualised as 'stewards' and motivated by non-financial incentives (Muth and Donaldson, 1998). This governance theory encourages better coordination between managers and Boards, on the basis that the former are trustworthy and better placed to deliver on strategic objectives. This is important, because it delineates between existing governance theory that centre on self-serving managers detracting from delivering benefit to primary beneficiaries. In contrast, managers in this model of governance enhance the delivery of benefits to the same group(s).

In terms of social enterprise, stewardship theory aligns with the ethos of social enterprise and the psychological and social profile of its managers. At the management level there is support for the stewardship approach, where the manager / entrepreneur is also from the defined community that the enterprise serves. Therefore, managerial decision-making should closely align with the required needs of that community. The success in prioritising, safeguarding and balancing interests is increased. This is because the manager has an empathy and clear focus on the recipients of social benefit. Furthermore, it is concordant with the view that social enterprise is likely to evolve to a much narrower business-focus (Dart, 2004). The narrower focus should result in the presence of a broader set of skills at Board level. In turn, this moves away from the inclusive representation at Board level of a range of key stakeholders regardless of their strategic instrumentality, towards a skills-set that can more effectively manage the entire operation. This represents a clear shift away from the generic inclusion of stakeholders at Board-level, and the stakeholder theory of governance. Stewardship theory is a pragmatic, instrumental theory of governance that emphasises trust (rather than control). At the conceptual level, it offers bounded acceptance of some of the premises of stakeholder theory (trust and inclusion), whilst recognising importance for rationality and value-production. It has been proposed as a more suitable model of governance for social enterprises (Dart, 2004, Low, 2006). This is because it accommodates the central two challenges for social enterprise: maintaining a commitment for stakeholders whilst performing effectively in chosen areas of enterprise. As we will make clear in the Case Study, the Bluecoat Arts Centre provides an enlightening overview of the early stages of its Board development. In particular, we show how it is trying to understand where its Board's strengths and weakness reside. In addition, how it may work with managers more effectively to provide them with the instrumental support they require at a critical juncture of the organisation's history.

In practical terms, the key aim of stewardship conceptions of social enterprise governance is ensuring that Board composition is both representative and sufficiently skilled to be fit for purpose. Also, it is enable the provision of strategic direction for successful tendering in the short term and sustainability in the longer term. The relevance of Board composition and skills has been highlighted in prior studies of governance (Muth and Donaldson, 1998), and in social enterprises (Royce 2006). In the latter work, two case studies revealed the impact of Board membership on the development of social enterprise organisations and reflect the vulnerability of the enterprises if competent leadership is not shown at Board level. In the first, an inner city Credit Union, the over reliance on a small group of key people left the Board and the organisation vulnerable when a change of location or personal circumstance meant that experienced and active Board members were no longer able to offer support. The lack of capacity building at Board level fuelled a reduction in service delivery levels and threatened the existence of the organisation. In the second case, an after school club failed to cope with its own success and as it outgrew its volunteer structure, was unable to retain and attract to the Board of trustees people with the skills set to set out a strategy for managing paid workers involved in a variety of different projects. The issue of skills at Board level is central to this discussion. Though 'skills' are clearly of importance on Boards, more attention must be paid to what type of skills are required. We must examine how social enterprises

identify the skills they require at Board level, and how they respond to Board change and 'up-skilling' of members to enhance their performance. Also, consideration must be given to the appropriate mix of Board level skills.

The different governance theories outlined above need more empirical evidence to support their appropriateness. The following section explains a case study, which traces changes in Board composition and development of a set of values and governance principles at the Bluecoat Arts Centre in Liverpool. Analysing Board development activities over a four year period, the case study will reveal the journey from intent to broaden Board diversity and revisit stakeholder representation towards Board skills audits, skills gap identification and the development of Board leaders or champions in areas identified as crucial to the sustainability of the organisation. In contribution to governance theory, it exposes the reality of governance in social enterprises.

Case Study - The Bluecoat Arts Centre, Liverpool

In 2000, Board reform was considered by the Arts Council, a major funder and stakeholder at the Bluecoat, to be one of the significant areas of challenge facing the organisation as it moved into a major building project and subsequently reopened with increased capacity. Stakeholder analysis in 2002 had revealed a requirement for a Board that could interact with funders, customers, employees, volunteers, retailers, artists, tenants, local and national Arts and political organisations, community groups, educational establishments and to have a commitment to diversity and a presence in disability Arts programming. A new position, the Vice Chair, was to have responsibility for Board development and a review of governance principles. Legal and architectural skills were already, at that time, represented at Board level. However, one of the first areas of concern was to appoint Board members with skills in marketing, HRM and finance but also to diversify the Board. Stakeholder inclusion is normatively in the relevant literature. However, we can see that the Bluecoat's Board were concerned that this may not necessarily provide the required instrumental ability to deliver value to the process of re-launch and future success of the organisation. Hence, a visible shift from general stakeholder to an emergent stewardship approach appears. Board diversity in terms of both gender and ethnicity improved with the appointments made and the recruitment and induction of these new members was completed by 2004. The Bluecoat was going to close completely for a period of two years during the rebuild so support to handle redundancies, maintain public visibility, manage the grant funding were urgently required. Initially the new board members engaged with the organisation using three subcommittees of the main board - capital project development, finance and HRM. With the appointment of a new CEO in 2006, the committee system came under review and opened a new set of discussions about the relationship of the Board with the CEO and SMT and guiding governance principles during the final years of the building project and subsequent reopening.

In 2006 an independently facilitated Board Away Day set out to determine the core values of the organisation and governance principles for the future. The values were agreed by joint discussion with Board and SMT. The values were defined as:

- INNOVATE
- STRETCH
- ENGAGE

Within those three values were key words and phrases defining the values:

- INNOVATE - creative, stimulating, contemporary, innovative
- STRETCH - ambitious, excellence
- ENGAGE - inclusive, engaging, supportive, through partnership and diverse

The goal statement to accompany this stated: “The Bluecoat will be an arts led, audience focussed arts hub, cohesive through all its activities. As a high profile, flagship organisation, we will be a centre of excellence, constantly renewing ourselves, leading to financial and cultural sustainability.”

The challenge therefore became one of ensuring that the Board was in a position to deliver the goals and values of the Bluecoat. A skills audit was set up in 2007 to determine the match between perceived requirements and availability. The audit was also used as an opportunity to seek opinion from Board members about their motivation as trustees and their views about the effectiveness of the governance methods used within the Bluecoat. The Board Development Committee had identified skills needs and the matrix below shows the extent to which a match has been achieved.

Perceived needs	Matched skills from Board 2007 membership¹
Finance	2
Human Resources	4
Arts Management	3
Legal	1
Marketing	2
Public Relations/Media	2
Fundraising	1
Audience Development	4
International Arts	1
Artistic - visual art	2
Artistic - literature	1
Artistic - dance	2
Artistic - music	2
Education	5
Building and facilities management	1
Access, equality	4
Information technology	2
Charity /governance	5
Business and management	5
Change management	5

Figure 1: Skills Assessment Outcomes

The effectiveness of the Vice Chair in developing the board membership over the period leading up to the skills analysis is shown by the relatively few gaps in terms of the perceived needs of the organisation. Indeed, a certain amount of strength and lack of vulnerability to individual Board member changes can be seen in some key areas: human resources, audience development, education, access and equality, charity and governance, business and management and change management. More vulnerable areas however included skills in the Arts ,Finance, Buildings management, legal and information technology. Recognising that the Board optimum size was probably no more than 13, the Board development committee was to review the up-skilling of existing Board members in key vulnerable areas and look to agree a development plan for individuals serving on the Board.

¹ Number of Board members reporting themselves as having key skills in these areas

The skills audit asked Board members to identify any additional skills not covered by the categories shown in the skills audit. Board members identified skills in the areas listed below.

Required Board Skill
Public/private sector partnerships for regeneration
DDA and Disability issues
Family Arts Development
Engaging disaffected communities
Diversity
Gallery education
Leadership
Networking
Strategic Planning

Figure 2 : Additional Board Skills

The Bluecoat will hopefully reopen early in 2008, coinciding with Liverpool's year as European Capital of Culture. The test of whether this Board is indeed fit for purpose will be how it adapts and behaves during a high profile and visible time of change. To support flexibility of approach, Board members are being asked to take on the role of leader or champion in their main areas of expertise and the HRM and Board development trustees are looking at tools to assess performance in line with the stated values of the Bluecoat. This is interesting because it exposes how Board members may have to evidence their potential 'added-value' to the social enterprise. Furthermore, the role of Board member is re-orientated to become more instrumental in the support of managers. It is this latter group who are recognised as integral in the successful re-launch of the Bluecoat. The role of the Board, therefore, is to support them in developing strategies to achieve this. In line with the expected emergent stewardship governance model, trust is maintained in managers to deliver the re-launch and continued success of the Bluecoat. Furthermore, the Board recognises that to achieve this, it must also change to better support managers, with specific expertise and instrumental guidance.

The case study will be developed further as the move towards opening proceeds. Yet, it does evidence the early stages of a social enterprise Board that is attempting to recognise its strengths and weaknesses. To the end, the Bluecoat is proactive it attempt to develop governance arrangements that support managers to deliver on objectives, as well as support growth and sustainability. The Bluecoat has attracted funding to support a facilitated Board development session which will encourage the Board to look beyond opening to sustainable governance practice in the future.

Conclusions

This paper presented a review of the theoretical themes in governance of social enterprises. Following the exposition of the Bluecoat Arts Centre case study, we can conclude that this presents evidence of a Board aligning itself towards a stewardship governance approach. The Board has acted proactively to re-orientate itself and its members towards being better able to deliver on enterprise and social bases. The concern is that as social enterprises become more professionalised, focus will shift away from delivering value to primary beneficiaries (Dees, 1998, 1994). Prior social enterprise governance research advocates stewardship governance because of the trust Board members place in managers to deliver on social objectives. This paper suggests

that Boards may actually be more able to maximise the delivery of social benefit through more effective positioning and training of Board members. As a result, managerial stewardship is maintained but the Board is more usefully positioned to assist them strategically in their activities. One of the common criticisms that social enterprise face is that they are ineffective in engaging with the day-to-day activities of the social enterprise.

As a first step in accommodating this perception, Boards should be encouraged to perform a skills audit and recognise where their strengths and weaknesses lie. This relatively simplistic approach to Board development offers a solution to encouraging Board members to become more instrumental in their roles. Mindful of the often voluntary nature of Board membership, the reorientation of Board member to 'functional consultant' offers staff the opportunity to liaise with them on an informal and more frequent basis. Increasing their availability and access with staff enhance the potential for Boards to add-value to their role. In turn, this activity is useful for accountability and social audits, showing the Board to be active, rather than passive, in the running of various aspects of the organisation.

This discussion associates the role of Board member with that of consultant to the manager (as steward), as proposed in the recent social enterprise governance literature. As the Bluecoat towards re-launch, we intend to show how its Board repositions itself to better support managers to make its operations successful.

Given the evidence presented from the case study and the discussion following it, we present some areas that will be examined as the case study develops in the coming months. These areas would also be worthy of further research. Principally, the focus should be on the role of Chief Executive / Chair in coordinating the skills audit and resultant changes. This position is key in governance, and we must determine the particular leadership qualities and management skills required to enact Board-level changes.

The impact on performance of this entire process (both social benefit and financial) needs to be clearly determined. This has implications on the legitimacy of the Chief Executive / Chair, as well as the social enterprise generally. Also, the value of the changes upon individual functions should also be understood. If stewardship theory is a more appropriate lens with which to view social enterprise governance, it would be useful to determine its instrumental value to managers. Furthermore, the outcome of such performance measurement of added-value poses implications for Board member tenure. Further evidence is required to show how Board members that do not add-value are managed, re-trained or removed from the Board. It is crucial that social enterprises are able to deliver their services competitively. Therefore, in this view of governance we should examine the impact of tenure on social enterprise Boards and performance.

Consequently, the recruitment practice of Board members to social enterprise Boards should be investigated. As social enterprise Boards attempt to recruit new members that fill specific skills gaps, there is likely to be a scarcity of available volunteers to fulfil the role. In which case, we need to establish the methods for recruiting suitable Board members, and / or the processes for 'promoting' managers to Board-level positions. Understanding these processes is valuable because it shows how non-Board members can be integrated into governance arrangements, adding skills and value to the Board whilst also enhancing its transparency and accountability.

Clearly, the dominant aim of this paper has been to present some cursory findings from a case study of Board development in a social enterprise. As the case study progresses in the coming months, we hope to be able to further elucidate the implications set out in this concluding

section. However, at this stage we are able to evidence how Boards in social enterprises can begin the process of Board development. This is the vital first step in improving the governance value of these important organisations, with the ultimate aim of providing sustainable social benefit in the long-term.

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