

*Full Length Research Paper*

# The study on organizational development for social enterprises in Taiwan

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**In solving traditional public sector “government failures” and social problems not addressed by public charities, social enterprises trigger the imitation of enterprise management by non-profit organizations, thus displaying a trend of commercial development in the development of economic value and public welfare value. However, because of social and cultural background differences, European countries and the United States have had different backgrounds of social enterprise development. Taiwan has had experience of social enterprise development similar to that of Western countries. Beginning with the establishment of philosophy, motivation, organizational life cycle, development characteristics of various stages, and foundation of operating business model, the organizational development of social enterprises in Taiwan region began primarily with social welfare and charity foundations, while the establishment of religious organizations further played the role of an important driving force. Thus, social enterprises began gradually moving towards association models formed by disadvantaged groups and cooperatives of community development. In recent years, social enterprise development has combined popularization of social capital and has transitioned into company models.**

**Key words:** Social enterprise, organizational life cycle, organizational development, business management model.

## INTRODUCTION

### Research background and motivation

“Social enterprise” and “social entrepreneurship” originated from 19<sup>th</sup> century England, when a number of charitable entrepreneurs observed that the welfare of employees could be promoted through the improvement of work environment, training and education, and enrichment of cultural life. In the early 20<sup>th</sup> century, welfare state theory arose and facilitated the strengthening and provision of social welfare measures of Western countries. Until the 1970s, government failures began emerging, with problems of bureaucratic inefficiencies, financial difficulties, and legitimacy, thus causing crises in the Western welfare states. As a result, demand for privatization of social welfare service and division of social work appeared. In “welfare pluralism,” Johnson (1987) proposed that other than the “legal social welfare” of traditional public sectors and market services and occupational welfare of private sector, social welfare services

of community enterprises, educational organizations, institutional organizations, religious organizations, charitable organizations, non-profit organizations (NPO), public welfare organizations, public affair clubs, and volunteer organizations form the social economy of the “third sector.” However, governments promoted management of social service enterprise through “de-institutionalization,” “de-bureaucratization,” and outsourcing contract. Thus, Western countries gradually began solving traditional public sector “government failures” and social problems not solved by public welfare charity organizations, public affair organizations, and volunteer social service organizations through the innovative method of “social enterprise.”

Rapid social changes from 1970 to 1980 produced numerous social problems in many countries. Especially with the shock of globalization and the consideration of

cost cutting and market expansion of various industries, the labor intensive industries in developed and developing countries began outsourcing to pursue higher profits, thus causing a rapid rise in the number of unemployed and crises in traditional industries. At this point, governments not only faced economic recessions but also needed to propose solutions for social problems including increased unemployment rates, disadvantaged groups, and poverty. To solve these problems, Western countries gradually applied the ideas of "social enterprise" to the afore described socio-economic problems and combine the concepts of society and economics to produce a new economic philosophy (Greater London Enterprise, 2004; OECD, 1999).

In a society with a dynamic environment, the problems confronted by corporations are multifaceted. The public has had growing expectations toward corporations and begun to demand that corporate objectives not only include stockholder interests and profit but also social responsibility. This has led to global discussion and development on the issue of "corporate social responsibility." Porter and Kramer (2006) has proposed that corporate social responsibility is a core strategy of management and recommended that corporations must utilize this core competence to select and implement social investments, thus producing a win-win strategy for society and corporations. This trend of social responsibility has simultaneously driven many well-meaning and capable professionals to establish social enterprises and solve social problems they are concerned with through promotion and establishment of wealth-producing businesses or organizations and the utilization of management methods and techniques, thus benefiting specific groups, departments, and area residents to produce social value. How corporate management methods can be used to realize social enterprises with social welfare objectives has gradually become a topic of discussion among international society.

Due to differences in social and cultural backgrounds, Western countries have had different social enterprise development backgrounds. The development of American social enterprises has been mainly based on responding to the financial predicament caused by government deficits and competition for government social service outsourcing contracts. The purpose of this wave of non-profit organization imitation of corporatism and display of commercial development trends has been to resolve economic issues and shoulder social missions (Dee, 1998; Frumkin, 2003). European social enterprises have mainly been a response to high unemployment rate and insufficient community care caused by government and market failures. With government encouragement, many micro-corporations (mainly cooperatives) began adopting non-distribution constraints, thus displaying the trend of socio-economic non-profitization (OECD, 1999; Defourny, 2001). Affected by globalization trends, Taiwan has had experiences of social enterprise development similar to those of Western countries. We should consider

strategies of Taiwan social enterprise development and how the innovative philosophies of social enterprises can be used to solve related social problems. As governments emphasize the promotion of social enterprises to solve social issues of poverty, the largest difference between social enterprises and traditional enterprises is that, other than the consideration of costs and profits, enterprises must have social objectives such as providing more employment opportunities. Social enterprise stockholders no longer pursue high profits, but only responsibility for profits and losses. After profits are made, they are utilized for investment in social contributions and further enterprise development. Social enterprises do not have the pressure of traditional small and medium sized enterprises, and only require the achievement of social objectives and financial equilibrium. However, assisting the impoverished cannot rely solely on the development of social enterprises. In recent years, the problem of income disparity in Taiwan has been more severe. As such, society should attempt to provide various solutions. While social enterprises have shown good results in their implementation in foreign countries for many years, Taiwan is still in the initial stages of social enterprise development. If business models and key success factors suitable for social enterprises can be found, it will contribute to operating strategies and management mechanisms suitable to the development of different types of social enterprises and Taiwan social enterprise development in Taiwan.

### Study objectives

Social enterprises face a transitioning public welfare market and recent insufficiencies in public welfare resource distribution, as well as unprecedented challenges in the operating methods and strategies. Numerous social enterprise professionals and scholars in related fields have begun rethinking operating methods, and social enterprises have begun acquiring innovative operating features. To respond to new operating challenges, social enterprises have also begun adopting a number of "innovative operation" models and the methods of how these innovative operating models can be utilized to exert the effectiveness.

Thus, the following research objectives are expected to be achieved by performing the following studies and research on the organizational development of social enterprises:

1. Defining social enterprises and understanding the types of social enterprises in Taiwan.
2. Analyzing the philosophy, motivation, and relative theory fundamentals of establishment of social enterprise in Taiwan.
3. Examining the organizational life cycle and organizational development characteristics of social enterprises in Taiwan.

4. Comparing the operating business models of Taiwan social enterprises in various stages of organizational life cycles, analyzing the evolution of business models adopted by social business enterprises in practice, and finding the most suitable social enterprise business model for reference.

## LITERATURE REVIEW

### The definition of social enterprise

Social enterprise is often expressed by “social entrepreneurship.” Young and Dennis (2001) believed that social enterprises refer to the adoption of corporate methods and business activities to promote social causes or organizations that contribute to the provision of public goods. According to Social Enterprise London (2002), social enterprises have economic and social functions. Utilizing entrepreneurship to provide local or community welfare and social transformation can further solve social problems through methods such as creating employment opportunities and providing employment training. The Organization for Economic Cooperation and Development (OECD) (2003) believed that social enterprises are non-profit organizations between the public and private sectors that primarily utilize transaction activities to achieve social welfare objectives and financial independence. Other than the adoption of corporate operation methods of private sector, social enterprises have the characteristics of non-profit organizations in achieving social missions. The Social Enterprise Alliance (2003) believed that social enterprises represent a type of new enterprise model transformation that utilize corporate strategies to produce products or labor services that can achieve social missions and create revenue to support its continual operation based on organizations with corporate philosophy fundamentals. The Conference of Asia Foundation and Organization (CAFO) (2003) believed that social enterprises are the establishment and promotion of enterprises or organizations that create wealth with the intention of providing social welfare in the public sector and in society. Shaw (2004) believed that social enterprises have the following characteristics: 1) enterprise orientation: participating in the production of commodities and the provision of services through the market directly, allowing for operation profit. 2) Social aims: strict social objectives such as creation of employment opportunities, local or community services, and provision of training, as well as strong social values and missions, including commitments to local development and responsibility to its members, community, environment, and economic development. 3) Social ownership: independent organization with governance and ownership based on the participation of proprietors, users, and local or community organizations; profits distributed to stakeholders or invested in the local area or community, as in Tables 1 and 2.

### Types of social enterprise

Social enterprises can be divided into different types based on the findings of different researchers:

- i. Based on the relationship between stakeholders and NPOs, Dees (1996,1998) and Dee et al. (2001) divided social enterprises into the: pure charity type; hybrid type; and the pure commercial type. Hybrid types can be expressed using the “social enterprise spectrum” and exhibits intersecting subsidies, including; full philanthropy support, partial self-sufficiency, cash-flow self-sufficiency, operating expense self-sufficiency, and full-scale commercialization.
- ii. The three types of social enterprise categorized by Clohesy consulting (1998) are as follows: 1) Unrelated businesses: creating income through usable organizational assets, such as gift shops, parking lots, and buffet restaurants owned by sponsors. 2) Mission-driven product or service businesses: obtaining funding through the delivery of products or services to clients to obtain funding from a third party, such as government institutions, special programs, or private insurance companies (such as services provided for the disabled or the elderly). 3) Affirmative businesses: creating and providing stable jobs, wages, employment opportunities and proprietary rights for physically, mentally, economically, and educationally disadvantaged groups.
- iii. Prabhu (1999) believed that social enterprises can legally exist in three different states: associations, clubs, and cooperatives or agency organizations. Three types are categorized based on type: 1) charity type: providing emergency rescue services and often related to religions. Members have passionate moral values and willingness to sacrifice, and sponsors hope to achieve social reform through non-political and non-violent means. 2) Social action type: seeking political and social issues actively and sometimes achieving social reform through political methods. 3) Development type: hoping to improve the economic state of disadvantaged groups through technology or organizational knowledge, but do not usually intend to achieve social reform.
- iv. Young (2001) categorized social enterprises into corporate philanthropists, social purpose organizations, and hybrids.
- v. Borzaga and Defourny (2001) and the European Commission (EU, 2001) examined the cross road of social enterprises. Cooperatives include workers’ and users’ cooperatives, while non-profit organizations include production-oriented NPOs and advocacy-oriented NPOs. Social enterprises tend to be hybrids of workers’ cooperatives and production-oriented NPOs.
- vi. The Stanford University Social Entrepreneurship Initiative believed that social enterprises can be categorized into three types: 1) NPOs which utilize organizational resources to resolve social issues in creative ways; 2) NPOs which assist individuals with establishing “micro-firms”; 3) NPOs which pursue the creation of economic

**Table 1.** Definition of social enterprises.

<b>Literature</b>	<b>Definition of social enterprises</b>
Boschee (1995), Dees (1998), and Weisbrod (1998)	Social enterprises are non-profit organizations that, faced with the effects of reduced government aid, loss of personal and corporate donations, greater social demand and competition, and the merging or closing of funding providers, search for additional revenue.
Waddock (1998), Sagawa and Segal (2000), and Wilkinson and Bittman (2002)	Social enterprises are businesses based on corporate social responsibility that perform the operation of cross-sector cooperation or partnerships.
OECD (1999)	Social enterprise refers to any private sector activities that can produce public benefit and use entrepreneurship strategies to achieve specific economic or social goals instead of for profit maximization and organizations that are beneficial to solving social and unemployment problems.
Young, Dennis R. (2001)	Social enterprises refer to the adoption of corporate methods and business activities to promote social causes or organizations that contribute to the provision of public goods.
Social enterprise London (2002)	Social enterprises have economic and social functions. Utilizing entrepreneurship to assist in local or community welfare creation and social transformation can further solve social problems through methods such as creating employment opportunities and providing employment training.
Alvord et al. (2002)	Social enterprises are the expression of entrepreneurship by independent social entrepreneurs looking for solving specific social problems.
Gartner (1990) and Mair and Noboa (2003)	Social enterprise is the innovative use of resource combinations and the pursuit of opportunities towards the creation of organizations or practice to create and continue social welfare.
OECD (2003)	Social enterprises are non-profit organizations between the public and private sectors that primarily utilize transaction activities to achieve social welfare objectives and financial independence. Other than the adoption of private sector corporate operation methods, social enterprises have the characteristics of non-profit organizations in achieving social missions.
The social enterprise alliance (2003)	Social enterprises represent a type of new enterprise model transformation that utilize corporate strategies to produce products or labor services that can achieve social missions and create revenue to support its continual operation based on organizations with corporate philosophy fundamentals.
CAFO (The Conference of Asian Foundation and Organization, 2003)	Social enterprises are the establishment and promotion of enterprises or organizations that create wealth with the intention of providing social welfare in the public sector and society.
Shaw (2004)	Social enterprises have the following characteristics: (1) Enterprise orientation: participating in the production of commodities and the provision of services through the market, allowing for the creation of revenue. (2) Social aims: strict social objectives, such as the creation of employment opportunities, local or community services, and the provision of training, as well as strong social values and missions, including commitments to local development and responsibility to its members, community, environment, and economic development. (3) Social ownership: independent organization with governance and ownership based on the participation of proprietors, users, and local or community organizations; profits distributed to stakeholders or invested in the local area or community.

Source: Organized by this study.

**Table 2.** Social enterprise spectrum.

		Choice continuum		
		Charity	Hybrid	Commercial
Typical motives, methods, and objectives		Appeal to charity Mission-oriented Creation of social value	Mixed motives Both mission and markets emphasized Social and economic value both emphasized	Pursues self-interest Market-oriented Economic value
Primary Stakeholders	i. Beneficiary	Free of charge	Subsidy funding or adoption of hybrid method where service recipients pay the full sum and/or receive services for free	Payments stipulated completely in accordance with markets
	ii. Funding	Donations and subsidies	Capital costs lower than the market price or donations and subsidies with capital at market prices	Funding at market prices
	iii. Labor	Volunteer	Wages lower than market prices or volunteers with employees at full salary	Salaries based on markets
	iv. Suppliers	Donate goods	Special discounts, or both donations and full pricing	Pricing based on market

Source: Dees (1998); Dees, Emerson and Economy (2001).

value and provide employment or

ix. The Social Enterprise Alliance (2003) divided social enterprises according to operating methods: 1) social-purpose business; 2) consulting; 3) cause-related marketing; 4) property rental; 5) licensing; 6) government contract; 7) non-social purpose business; 8) new product development; 9) corporate partnership; 10) acquisition; 11) joint venture; 12) technology development; 13) Franchise; 14) set-aside; 15) program or project-based business; 16) cooperative.

x. Wymer et al. (2003) believed that social enterprise can be divided into six types based on the two constructs of partner motivations and relationship expectations and the partner relationship between NPOs and enterprises: corporate philanthropy, corporate foundation, licensing agreement, sponsorship, joint issue promotion, and joint venture.

The largest charitable social investment foundation of the United Kingdom, Venturesome (2008), believed that traditionally, different interested parties usually have different definitions and classifications for social enterprises. Thus, a series of social enterprise types are primarily divided into (1) charities with fundraising: grant income, (2) charities with "on mission" trading contracting, (3) social benefit enterprises, (4) social purpose businesses, (5) social responsibility businesses, (6) businesses generating profits for charitable spending, and (7) commercial businesses. As no clear definition exists for each one, gray areas are produced, as shown in Figure 1.

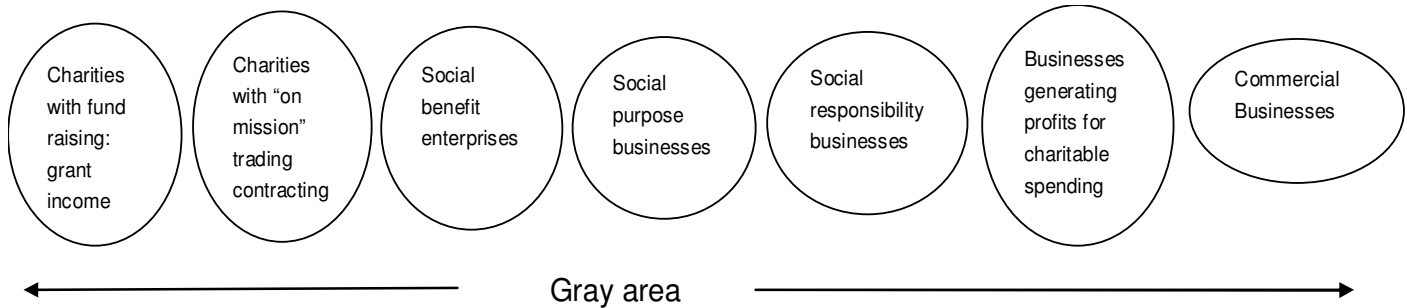
In recent years, with developments in the conception of social investment, the categorization of social enterprises has changed from "demand side" to "supply side." Thus,

the categorization of social enterprises has shifted from the traditional seven types to future nine types. Two types, (7) commercial business plus SRI and (8) commercial business plus CSR, are included before "commercial businesses," as shown in Figure 2, thus defining the basis for organizational development of Taiwan social enterprise in this study.

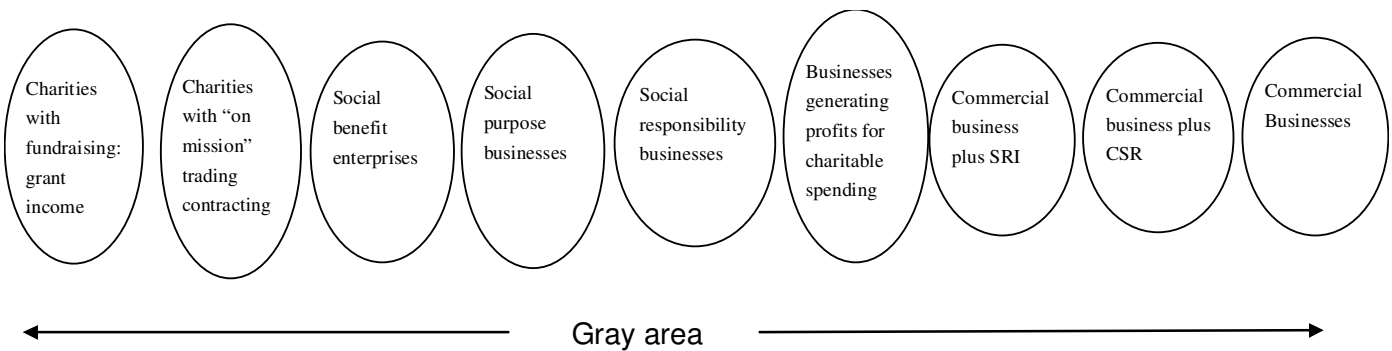
### Organization lifecycles

Organization life cycle theory has existed for long. Haire (1959) was the first scholar to incorporate the idea that the process of organizational development exhibits some universal forms into organizational development theory. He suggested that the growth of organizations is similar to that of living organisms, with observable cyclical phenomena in the birth, growth, maturing, decline, and death of organizations. Chandler (1962) incorporated the concept of stages into the life cycle model; the growth stages theory suggests that firm strategy and structure change in different stages. Kimberly (1981) suggested that organization life cycle can be viewed as an analogy to organism life cycle. Thereafter, the concept of organization life cycle was connected to various problems in organizational management. For example, the perspective of the founder was used to study enterprise culture at the founding of organizations (Pettigrew, 1977; 1979), analyze newly established firms (Galbraith, 1982), and maintain firm performance (Scanlan, 1980).

The life cycle model posited that organizations pass through the stages of founding, growth, maturing, decline, and rebirth. During the founding and growth stages, the firm sells a single product (Scott, 1971) and is led by a



**Figure 1.** Traditional social enterprise categorization Source: Venturesome (2008).



**Figure 2.** Future social enterprise categorization Source: Venturesome (2008).

single individual (Thain, 1969; Scott, 1971; Adizes, 1979); the founder shoulders the responsibility for managing all company affairs. The company soon begins operating and establishes technological advantages, innovative capabilities, or entrepreneurship to capture the market (Greiner, 1972; Lyden, 1975; Lorange and Nelson, 1987). The main point of this stage is to ensure consistent financial supplies to sustain existence (Adizes, 1979; Kimberly, 1979). Enterprises in this stage are characterized by employees who work long hours; long-time employees (Greiner, 1972), informal communication procedures and organizational structure (Greiner, 1972; Torbert, 1974), and management based on personal leadership and centralization (Scott, 1971).

During the growth stage, companies begin to expand and gain the ability rapidly to produce more than one type of product (Scott, 1971). Because of increases in scale and complexities of operation, there is a greater need for planning (Downs, 1967), with an emphasis on the establishment of regulations and procedures as well as maintaining the stability of the organizational structure (Katz and Kahn, 1978). At this point, it is absolutely necessary for the founder to relinquish some authority to ensure the sustainable operation of the firm (Thain, 1969). This stage is characterized by a more formal structure (Katz and Kahn, 1978) as well as a focus on work performance (Torbert, 1974), functional special-

ization, and departmentalization (Scott, 1971).

When a firm enters the mature stage, its regulations and procedures have gradually formed a rigid structure, even suppressing the firm's ability to adapt to changes in the market environment (Lippitt and Schmidt, 1967). Kimberly (1980) noted that the process of systematization strengthens the stability of the firm's structure but also weakens the firm's innovative capacity and the ability of the firm to adapt to uncertain future environments, leading to the decline of the firm (Peter and Waterman, 1982). Potential strategies for increasing flexibility include: using the stability and real-time information systems of matrix structures (Greiner, 1971), developing diversified products and implementing power-sharing and diversification (Scott, 1971). This stage can be used as a central axis to divide the organizational life cycle into the entrepreneurship stage, acceleration stage, systematization stage, and rebirth stage. Smith et al. (1985) introduced a multi-division model with fifteen variables to divide the enterprise life cycle into the start-up stage, high-growth stage, and mature stage. Their research showed that: Relative to different environmental situations, enterprises in different stages of the organizational life cycle adopt different operating strategies; In the face of high degrees of environmental stimulation, firms plan the strategies more carefully; In addition, firms in the high-growth stage are significantly more careful in

**Table 3.** Characteristics of stages of the organization lifecycle.

<b>Life cycle stage</b>	<b>Stage characteristics</b>
Entrepreneurial stage	The smallest organizational scale, including operating revenues, capital, and employees; lack of international experience. Unified ownership rights and management rights, high degree of power concentration. Lowest degree of formalized organizational structure. Willing to bear operating risk. Lower corporate age limits; low degrees of diversification. Production of a single product for a single market.
Acceleration stage	Beginning to emphasize planning of internal organization, establishment of information systems; higher degree of organization structural formalization compared to entrepreneurial stage. Relative to entrepreneurial stage, power concentration in the organization gradually decreases. Higher degree of diversification compared to entrepreneurial stage. Rapid growth of organization scale, but less than in the systematized and rebirth stages.
Systematization stage	Organizational scale exhibits a formal hierarchical structure; high degree of conservatism Adoption of conservative, defensive market-strengthening strategies; strategies become rigid. Growth slows or even drops, but operating scale continues to expand. Emphasis on professionalism; power division trends towards decentralization. Growth in organizational scale slows and even drops, but operating scale continues to expand.
Rebirth stage	Enterprise scale reaches its largest size. Enterprise growth largely dependent on mergers and acquisitions or establishing new operating departments. Longest corporate age limit; high degrees of market and product diversification. High degree of organizational formalization, even to the point of rigidity. Hierarchy is very obvious. High degree of organizational formalization, even to the point of rigidity.

Source: Frenley (1945).

deciding operating strategy than are enterprises in the mature stage. Table 3 shows different characteristics of enterprises at different stages in the enterprise lifecycle.

### **Division of the organization lifecycle**

The organization life cycle can be divided into different stages based on observations of different dimensions. Since scholars differ in their definitions of aspects and areas of focus, the development stages they construct also differ. This study compiled the theories and interpretations of foreign scholars to establish a theoretical framework for dividing organization life cycle of enterprises.

#### ***Division into three stages***

Lippit and Schmidt (1967) suggested that typical organizations usually experience three developmental stages (Zhang, 1986):

1. Start-up stage: establishing a system for operations, at the same time opening the market and establishing

recognition.

2. Adolescent stage: attempting to ensure stable development of the organization; establishing business reputation.

3. Mature stage: pursuing market share, developing unique style; expansion of operating scope.

Smith et al. (1985) examined the management priorities of high-level managers in different stages of the organization life cycle. In their study, they divided organization life cycles into fifteen different dimensions: sales revenue growth; employee quantity growth; organization structure definition; structure form; adherence to formal structures of communication systems; budget use; timeline of budget and planning; decision-making type; composition of high-level management; organization age; organization scale; and number of employees. The dimensions were used as variables for dividing organization life cycles into three stages of inception, high growth, and maturity.

Gapta and Chin (1993) divided the organization life cycle into inception stage, high growth stage, and maturity stage. They used the fifteen indicators developed by Smith et al. (1985) as categorization variables. They found that firms are usually more careful to establish

operating strategies when facing greater environmental stimulation. In addition, enterprises in the high growth stage are significantly more careful in deciding operating strategies than are enterprises in the maturity stage when facing greater environmental stimulation.

### ***Division into four stages***

Rumelt (1974) used sales as a standard to distinguish between four stages of organizational growth based on relevancy and sales diversification: single sales, primary sales, related sales, and unrelated sales.

Kimberly (1979) used a newly established medical school as a subject for studying organizational life cycles, using internal social control, management relationships in normal environments or management relationships in special environments as standards for dividing the life cycle into four stages: stage 1 emphasized the allocation of and the creation of ideology; stage two involved obtaining external support, strengthening recruiting of officers, and selection of important managers, as well as making typical or discrete decisions; stage three involved the formation of organization identity similar to consensus in family collectives, focusing on the execution of tasks and temporarily delaying the implementation of individual needs; stage four possessed formalized structures, establishing organization policies and regulations, and also facing internal competition while stabilizing relations with the external environment. Speaking overall, the organization tends towards a conservative form.

Smith (1982) and Quinn and Cameron (1983) differed in their views of dividing the organization life cycle, but agreed on the following four stages:

- i. Start-up stage: emphasizing development of products and the market. The emphasis in human resources is on attracting individuals who make important contributions and encourage organizational innovation. Risk is very high at this stage; sales grow slowly and profits are low. As a result, enterprises must provide bonuses to encourage employees to innovate.
- ii. Growth stage: expanding the scope of product markets and pursuing market share; sales grow quickly, and profits can increase appropriately. In order to continue pursuing growth, the company must increase the number of products and services to satisfy market demands. At this point, the emphasis in human resources is on recruiting and training, using bonuses to reward innovative and high performance employees.
- iii. Mature stage: company growth tends to be slow; high entry costs and barriers to exit reduce the number of competitors. Companies have more opportunities to be profitable as a result. At this point, the emphasis in human resources is on retaining high performance employees using profit sharing, cash bonuses, and stock options. In addition, companies also provide competitive basic salaries and employee benefits.

iv. Decline stage: due to falling market share and being forced out off the market, the emphasis in human resources is on reducing headcount. Companies may cease operations or focus on innovation to pursue growth. Basic salaries and benefits may be reduced below market standards.

The organization life cycle introduced by Fernley (1996) forms a central axis to be divided into four stages of entrepreneurship stage, acceleration stage, systematization stage, and rebirth stage.

Quinn and Cameron (1983) suggested that organizational development can be divided into enterprise period, collective period, formalization and control period, and strict structure period: 1) the enterprise period emphasizes the allocation and use of organization resources; 2) the collective period is characterized by informal structures, informal communication channels, a collective mentality, long work hours, a sense of purpose and identity, and continuous innovation and risk-taking; 3) the formalization and control stage is characterized by formalized policies and regulations, stable structure, emphasis on efficiency, and a tendency towards conservative and systematized formal procedures; 4) the strict structure stage is characterized by organizational structure tending towards detail and professionalization, division of authority, as well as correction, adjustment, and expansion of organizational goals.

Robbin (1991) suggested that organizational development passes through four stages of development: 1) the formation period, where the purpose of the organization's existence as well as the organization's structure and hierarchical relationships are not stable; 2) turmoil period, where conflicts exist integrally in the organization and members have insufficient trust for the organization; 3) The normative period, where organization cohesiveness is strengthened, an organization structure is formed, and members follow common standards; 4) The execution period, where the organization begins to operate formally and moves towards goals defined by the organization. Temporary organizations also have an end period, meaning that the organization ceases operations when organization objectives are achieved.

Baliga and Hunt (1998) suggested that organization development is characterized by four stages: 1) birth stage; 2) growth stage; 3) maturity stage; 4) rebirth stage.

### ***Division into five stages***

Greiner's (1972) model of organizational growth is a relatively important concept among organizational life cycle models. He used the five variables of age of the organization, size of the organization, stage of evolution, stage of revolution, and growth rate of industry to divide organizational development into five different stages: 1) creative stage, with relaxed and informal communication channels and structure; 2) direction stage, with hierarchical



departmental structures, budgeting systems and standards, and dividend systems; companies are led by powerful enterprise managers and have formal regulations and policies; 3) delegation stage, which involves devolution of authority to deal with exceptional circumstances. Profit center systems are also instituted; 4) coordination stage, involving formal planning procedures with departments divided based on production; 5) collaboration stage, focusing on problem-solving and experimentation with performance and rewards for different expert teams.

Miller and Friesen (1984) used company strategies, structures, environments, and decision making forms as variables to divide organization life cycles into birth, growth, maturity, revival, and decline. The conclusions suggested that there is indeed consistency between the strategies, structures, and decision making forms of companies in the same stage; there are significant differences between different stages. However, not all organizations follow the same progression of stages.

### ***Division into six stages***

Katz (1970) used differences in organizational structure to divide organizational growth into different stages: one-person period; staff management; functional management; regional management; holding company; independent company.

Adiz (1979) used primary organization activity systems to construct organization convergence and construct organizational life cycle models. His model consisted of six stages: i) start-up stage: conceptions and enterprise activities of founders; ii) infancy stage: emphasizing production and strong time pressures, without traditional style and with few meetings and plans; iii) expansion stage: organization rapidly expands, and personal leadership begins to involve some planning as well as quick, regular, and subjective decisions; iv) adolescence stage: emphasizing the importance of planning and coordination. With the expansion of corporate activities and production, administration activities become more common. The organization becomes more stable and conservative, and develops formalized regulations and policies; v) primary stage: emphasizing the importance of efficiency. The organization has low contact with the environment; there are clear boundaries between the organization and the environment. The organization seeks to maintain stability and no longer pursues growth and change. Evaluations of the organization are also consistent and predictable; vi) maturity stage: organizational atmosphere is comfortable and relaxed, emphasizing production and formalization of relationships between departments; there are few new changes.

It can be seen that scholars differ in the classifications of enterprise growth stages due to differences in the use of single or multiple variables. As a result, classifications from three to eight stages as well as subjects and topics

of research also differ between studies.

### **Operating strategy theory relevant to organizational lifecycles**

Industry ecologies have life cycle stages, and enterprises within industries also have individual life cycles. Group ecologies are related to individual life cycles. According to enterprise organization life cycle theory introduced by Adizes (1998), the problems of survival faced by enterprise organizations differ across different life cycle stages. As a result, operating strategies and organizational structures change in accordance with changes in enterprise organizational life cycle stages. Porter (1980) also suggested that appropriate growth and capital reserve strategies must be determined based on enterprise life cycle stages.

Enterprise organization life cycle theory has been broadly applied to the determination of enterprise operating strategy (Smith et al., 1985; Gupta and Chin, 1993; Dodge et al., 1994), the association between enterprise operating strategy and operating performance (Beldona, 1997; Robins, 1992), and organization structural characteristics (Kimberley and Miles, 1980; Dodge and Robins, 1992). From historical perspective, enterprise development is a process of continual adjustment and change. Enterprise organizations are like organisms, in that they experience life cycles in their pursuit of space for survival. Life cycle models posit that enterprise organizations pass through the stages of establishment, growth, maturity, and revival. Since enterprises face different survival problems in different lifecycle stages, the operating strategies adopted by enterprises also differ in theory (Smith et al., 1985; Black, 1998; Stickney, 1999). Stage models divide the process of enterprise growth based on some important standards. As a result, each stage of growth has particular points of development and operating characteristics. From the perspective of practical application, Miller and Friesen (1984) found the following three implications for management from their research on large enterprises:

1. Managers can assess the stage in which their companies exist to facilitate understanding of problems of companies and to predict future challenges.
2. Organizations in the same stage of development face common problems. Creating a framework based on points of similarity can facilitate understanding of characteristics and bottlenecks of various sizes of enterprises.
3. The analytical framework of growth stages can help accountants and management consultants tracking problems and determining possible solutions.

Consequently, social enterprises have primary business models adopted at various organizational life cycle stages based on organizational characteristics and operations. Table 4 shows different Organizational

**Table 4.** Organizational characteristics and operating models of social enterprises at various life cycle stages.

Lifecycle stage	Organizational form	Business model	Technical capability	Value claims
Birth stage	Simple Operating mechanisms Highly focused authority	High degree of product innovation Niche strategy	Improving professional abilities Improving Production Efficiency	Solving Social Problems Assisting Disadvantaged Groups Idea advocacy Self-realization
Growth stage	More Formal Structure Functional Organization Begin developing information processing and strategy methods	Expanding related product lines Innovation of product lines Rapid growth Professional Management Teams	Developing New Products Developing New Technology	Creating more resource conditions Increasing rapid response to market demands
Mature stage	Formal hierarchical Structure Functional Organization Moderate differentiation and power concentration Developing information processing decision making	Product market strengthening Conservative Slow growth	Rapid product introduction Rapid establishment of effective mechanisms	Low cost strategies High volume sales strategy Increasing market share Increasing market exposure
Rejuvenation stage	Formal hierarchical structure Functional Organization Less strict power concentration and decision making	Low-level innovation Risk avoidance Conservative Low growth	Many differentiated products Diversified differentiated services	Customization Increasing added value

characteristics and operating models of social enterprises at various life cycle stages.

## RESEARCH METHODS

### Research framework

Through literature review, this study utilized the four stages of social enterprise organizational life cycles: birth, growth, maturity, and rejuvenation, as described by Baliga and Hunt (1998). Business operating models are primarily consolidated into organizational forms, operating strategies, technical capabilities, and value advocacy. The developmental stages and organizational types formed by social enterprises during the organizational life cycle impact operating activities, achieving economic value and social value objectives (Figure 3).

### Questionnaire design

The design of operationalized questions for research variables were based on the literature review and research framework described earlier. The research variables involved in this study included five parts in terms of operationalized question design. The first section included basic information to gain an understanding of the basic information of social enterprises, including time of establishment, funding amounts, proportions of funding sources, organizational characteristics, and worker characteristics. The second portion involved focuses, social service recipients, and scopes of operating

activities. The third portion dealt with the ideals and motives involved in the establishment of the enterprise as well as the relevant theoretical foundations. The fourth section dealt with the business activity methods adopted by organizations to achieve social services and profit-making behavior objectives in order to provide an understanding of the business activity methods adopted by social enterprises; this section concerns which business models are used to achieve social services and profit-making objectives. The fifth section concerned about limitations faced by organizations in business operations; an understanding of these limitations required a comprehension of factors limiting the development of social enterprises.

The questions from the five sections described were used to create a questionnaire. During interviews, subjects could have "structured questions" and "structured answers." To compensate for shortcomings in structural problems, each section included "other" questions, allowing subjects to explain "open answers."

### Survey investigation and data collection

This study established a research population of 106 foundations based on a list of 300 foundations, consisting of charitable foundations as well as associations, enterprises, and cooperatives engaged in social enterprise operations, published in 2005 by the Himalaya Research Development Foundation. Interviews were performed according to the "List of Primary Social Enterprises in Taiwan." Selection of subjects for the interview method was based on basic NPOs and those with commonly held social enterprise ideals. NPOs established by the government public sector to ensure that funding was not provided by the government. This

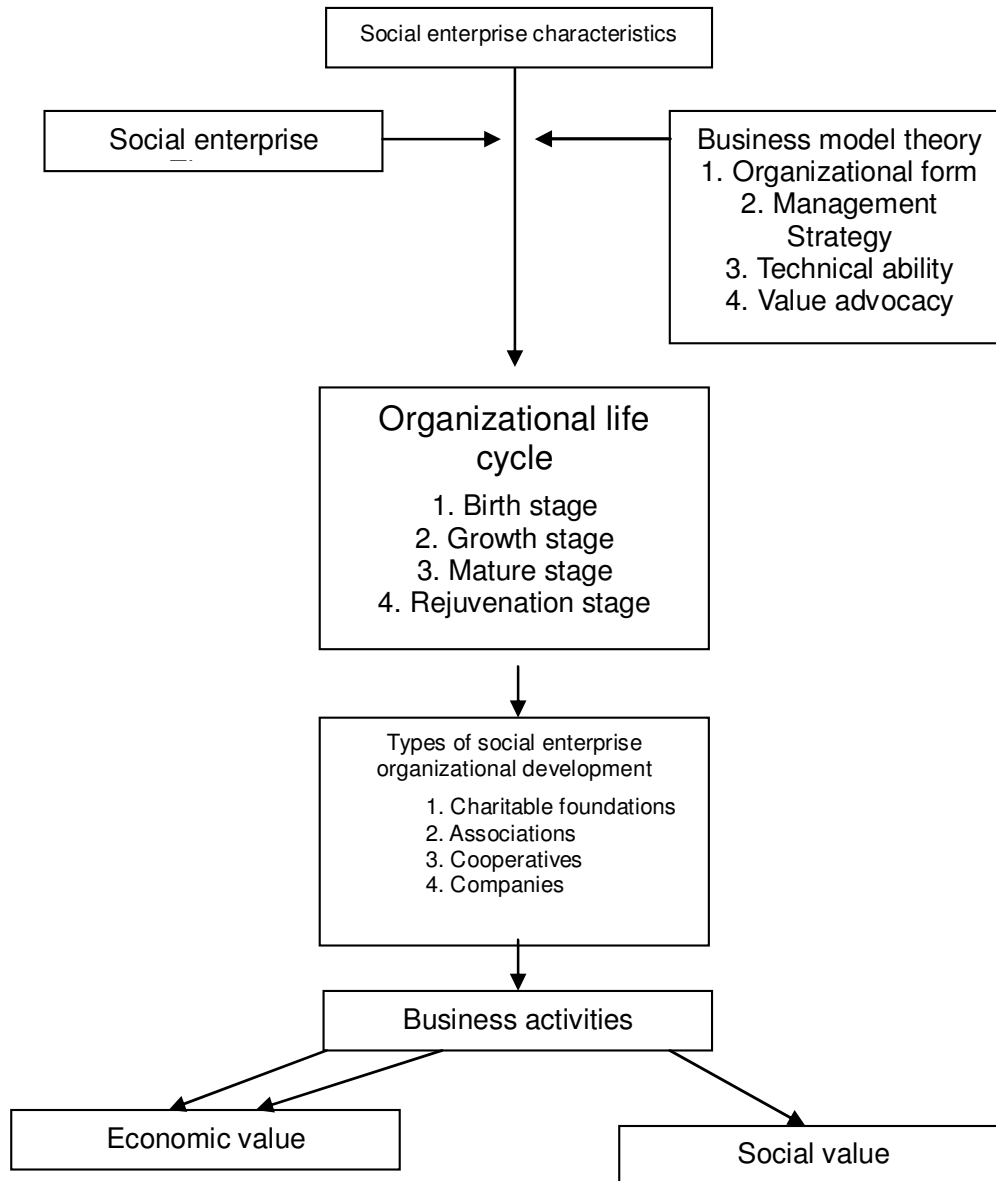


Figure 3. Research framework.

paper tried to ensure that the operating strategies and business models adopted by NPOs create income and achieve social missions or public goods, so that social enterprises would not be conflated with state-owned businesses invested in by government departments.

The interview was carried out from November to December, 2008 (two months). One hundred and six charitable foundations, three social enterprises, two associations, and two cooperatives were interviewed.

**ANALYSIS AND FINDINGS**

**Development of types of Taiwan social enterprises**

Of the survey respondents, most charitable foundations

were established to commemorate deceased persons by performing normal socially beneficial activities; alternatively, firms established foundations to perform corporate social responsibility (CSR) activities or investments. Political groups also established foundations to provide social services. Sixty-six charitable foundations performed social enterprise. Together with seventeen associations, four cooperatives, five companies, there were ninety-two units performing charitable activities.

In the process of organizational development of social enterprises, charitable foundations continued to play the largest role with sixty-six units. Twenty-nine organizations established by religious groups were important force. A number of organizations established by disadvantaged

were the next most important category. Investment in social enterprises by companies in Taiwan has not yet become popular. According to Venturesome's (2008) classifications of social enterprises, the organizational development of social enterprises in Taiwan is expressed in the following forms:

- 1) Charitable foundations perform charitable activities based on donations.
- 2) Charitable foundations and associations perform socially beneficial activities based on donations or government funding.
- 3) Charitable foundations, associations, and cooperatives establish socially beneficial organizations.
- 4) Businesses establish organizations with social objectives.
- 5) Businesses creating profits engage in charitable activities.
- 6) Businesses engage in corporate social responsibility (CSR) or socially responsible investment (SRI).

#### **Time of establishment of social enterprises in Taiwan**

Of the ninety-two organizations surveyed, only eight were established before 1980; thirty-one were established between 1980 and 1990; thirty-four were established between 1991 and 2000; eighteen were established after 2001. These results indicated that organizations developed rapidly along with social liberalization and economic growth after the 1990s, particularly following the loosening of the application process for civil organizations and the privatization of social welfare policies. Table 5 shows the details.

#### **Capital scale of Taiwan social enterprises**

Of the ninety-two organizations surveyed, twenty had endowments in excess of 100 million NTD. Of these, eleven organizations were charity foundations established by religious groups. Twenty-six organizations had capital between thirty million and 100 million NTD; of these, twelve were established by religious groups. Due to the national minimum requirement of thirty million NTD and local minimum limits of 100 million NTD, social welfare organizations with insufficient funds were established in the form of associations. After the "community overall construction measures" were developed by the government and the "diversified employment development project" of the "sustainable employment hope project," many community development organizations and diversified employment cooperatives oriented towards disadvantaged groups appeared. In recent years, to integrate the popularization of social capital, organizations were transformed into the form of social enterprises; however, these organizations are limited in the scale of

funding as shown in Table 6.

#### **Focuses and service recipients of social enterprises in Taiwan**

According to the survey investigation of ninety-two organizations, social enterprises in Taiwan primarily focused on "handicapped welfare," "women and children welfare," and "elderly welfare," followed by "charitable activities," "protection and placement," "vocational education and training," and "counseling in physical and mental health," followed by "health and medical services," "medical aid," "community care services," "counseling," "indigenous/foreign spouses services," "employment creation." "Creation of social capital" has not formed focuses for social enterprises in Taiwan, as shown in Table 7.

#### **Business operations activities of social enterprises in Taiwan**

The ninety-two survey respondents in this study reported diversified business activities, primarily "publications," and providing "agricultural and fishery products" and "normal food products"; followed by "operating sheltered workshops/stores," "audiovisual materials," and providing "clothes/accessories"; then followed by providing "health and medical services," "training services," "news broadcasting," and "cultural tourism." "Souvenirs," "paintings," "business services," "gas station/carwash services," "cleaning services," "food and accommodation in traveling" and "residence rental" were quite common. Operation of modern "information services," was uncommon. The investigation found that the business activities operated by social enterprises in Taiwan involved products of primary economic activities (that is, agriculture, forestry, fishing, animal husbandry) and food services and did not entail a high degree of technical involvement. Publication was the most common activity and aimed towards gaining recognition from society.

The second-most common activity of sheltered workshops/stores constituted a core strategy of encouraging employment among the handicapped. Managers are professionals who are hired part-time or full-time. The department of labor of Taipei City has a set of guiding measures which divide organizations into the four different industries of stores, dining, outsourcing, and working teams; sixteen organizations participate. As shown in this investigation, operation of health and medical services, training services, and news broadcasting services have also become major components of business activities engaged in by social enterprises in Taiwan. Local social enterprises, such as community cooperatives and associations, typically emphasize cultural tourism and providing food and accommodation in traveling as well as horticultural products.

**Table 5.** Types of social enterprises of Taiwan and dates of establishment.

Type time	Charity foundation	Religious	Regular	Association	Cooperative	Company
1946 to 1960				i. Taiwan After-Care Association (1946) ii. Taiwan Mouth and Foot Painting Artists Association (1956)		
1961 to 1970	i. World Vision Taiwan (1964) ii. Taiwan Christian Service (1966)		i. Chung Yi Social Welfare Foundation (1970)			
1971 to 1980	i. Tzu Chi Foundation (1980)		i. Cardiac Children's Foundation of Taiwan (1971)	i. Association of the Blind of the Republic of China (1973)		
1981 to 1990	i. Eden Social Welfare Foundation (1982) ii. Catholic Welfare Foundation (1984) iii. Taiwan Fund for Children and Families (1985) iv. The Garden of Hope Foundation (1988) v. Maria Social Welfare Foundation (1988) vi. Christian Salvation Service (1988) vi. City People Foundation (1989) vii. Fo Guang Shan Jurdical Peson Compassion Foundation (1989)		i. Chinese Culture and Social Welfare Fund (1981) ii. Childhood Cancer Foundation (1982) iii. Sunshine Social Welfare Foundation (1982) iv. Chung-Hua Foundation for Persons with Intellectual v. Taipei Yoyuen Social Welfare Foundation (1983) vi. Syin-Lu Social Welfare Foundation (1987) vii. Taipei Li-shin Charity Foundation (1987) viii. Awakening Foundation (1987) ix. Genesis Social Welfare Foundation (1988) x. Foundation for Austic Children and Adults in Taiwan R.O.C (1988) xi. Childhood Burn Foundation of the Republic of China (1988) xii. Taipei Women's Rescue Foundation (1988) xiii. Shu Ho Social Welfare Foundation (1989)	i. Taipei Mental Rehabilitation Association (1984) ii. Warm Life Association (1988) iii. Red Heart Association (1988) iv. The League of Welfare Organizations for the Disabled (1988) v. Republic of China Handicapped Skill Development Association (1990)		i. Victory Potential Development Centre for the Disabled (1963 / 1990)

**Table 5.** Contd.

		xiv. Kaohsiung Hou Jing Social Welfare Foundation (1990)			
		xv. Himalaya Foundation (1990)			
		xvi. Modern Women's Foundation (1990)			
		xvii. Noordhoof Craniofacial Foundation (1990)			
		xviii. Hospice Foundation of Taiwan (1990)			
1991 to 2000	i. Lan En Cultural and Educational Foundation (1991) ii. Mackay Social Welfare Foundation (1992)	i. Premature Baby Foundation of Taiwan (1991) ii. Taiwan Foundation for the Blind (1991)	i. Jeniu Village Development Association (1994 /2000) ii. Make a Wish Taiwan (1994)	i. Tungshih Hakka Gourmet Cooperative ii. Taiwan Aboriginal Construction Worker Cooperative	i. Lapis Lazuli Light Publishing Co., Ltd. (1992) ii. Leezen ((Organic Agriculture Development Foundation)(1998)

**Table 6.** Capital scale of social enterprises in Taiwan.

Capital scale (NTD)	Number	Percentage
Over 5 billion	2	2.1
2.5 to 5 billion	1	1.5
1 b to 2.5 billion	2	2.1
500 million to 1 billion	3	3.2
100 million to 500 billion	12	13.0
50 to 100 million	10	10.8
30 to 50 million	16	17.4
10 to 30 million	8	8.7
5 to 10 million	8	8.7
1 to 5 million	3	3.2
Under 1 million	27	29.3
Total	92	100.0

## CONCLUSION AND RECOMMENDATIONS

In the process of social enterprise organizational development, social welfare charity fund remains as the primary organization type, with those established by religious organizations producing

important force, followed by handicapped care groups formed by disadvantaged groups. Investment in the operations of social enterprises by firms in Taiwan has not yet become widespread. In terms of the time of establishment of social enterprises in Taiwan, the government loosened

the processes for registration and establishment of civil organizations in mid-1980s; the privatization of social welfare policies was established as a consequence. Social enterprises developed rapidly with societal liberalization and economic growth. The establishment of social enterprises in

**Table 7.** Focus and service recipients of social enterprises in Taiwan.

Focus	Recipients of social services	Percentage (%)
Handicapped welfare	26	13.9
Women and children welfare	24	12.9
Elderly welfare	22	11.8
charitable activities	18	9.6
Protection and placement	18	9.6
vocational education and training	12	6.4
Physical and mental handicap counseling	11	5.9
Health and medical services	8	4.3
Emergency rescue	8	4.3
Community care services	7	3.7
Indigenous/Foreign spouses services	6	3.2
counseling in physical and mental health	6	3.2
Employment creation	6	3.2
Creation of social capital	5	2.7
Disaster relief	5	2.7
Employment counseling	4	2.6
Total	186	100.0

Taiwan is widespread after 2001.

In terms of the capital scale of social enterprises in Taiwan, many community development associations and diversified employment cooperatives serving disadvantaged groups appeared after 2000 to integrate the popularization of social capital and transform into social enterprises. However, capital scales remain limited in size. The focuses and service recipients of social enterprises in Taiwan involved "handicapped welfare," "women and children welfare," and "elderly welfare," followed by "charity activities," "shelter and placement," "vocational education and training," and "handicapped counseling," then followed by "health and medical services," "emergency rescue," "community care services," "counseling in physical and mental health," "indigenous/foreign spouse services," and "employment creation." "Creation of social capital" has not yet become a point of focus for social enterprises in Taiwan.

Business activities were diversified. Primary activities included "publications," and providing "agricultural and fishery products" and "food products." Few organizations were involved in modern "information services." Investigation showed that the business activities operated by social enterprises in Taiwan involved products of primary economic activities (that is, agriculture, forestry, fishing, and animal husbandry) and dining services; these operations do not involve high level of technical expertise. Publications were the most common activity and are intended to gain recognition from society. The second-most operation, sheltered workshops, constitutes the core strategy for encouraging employment of the handicapped. Managers are part-time or full-time professional managers. Operation of health and medical services as well as training services have become primary

components of social enterprise business operations in recent years. Local social enterprises, such as community cooperatives and associations, tend to emphasize cultural tourism and providing food and accommodation services in traveling and horticultural products.

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