



BALTA

The BC-Alberta Social Economy Research Alliance

New Book Features BALTA Research on Co-ops

with contributions from the Centre
for Co-operative and Community Based
Economy and the B.C. Co-operative Association



Co-op Week events in Victoria (October 21) and Vancouver (October 22) featured the launch of a new book by BALTA co-investigator, **John Restakis**. *Humanizing the Economy: Co-operatives in the Age of Capital* is published by New Society Publishers and looks at the contribution that co-op models can make in creating a more equitable, just and humane future. The book is partially based on BALTA research that was led by John (Project B2, Co-operative Models of Social Care; <http://hdl.handle.net/2149/1960> and <http://hdl.handle.net/2149/1673>).

The book was written as the global economic crisis unfolded and the world witnessed our financial systems on the verge of collapse. The crisis of capitalism and the lack of any consequential discussion of an alternative provided a context for Restakis: "Why is it that many people who are working for social change don't look at co-operatives as a way of organizing their economic

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November Events Feature BALTA Research



Peter Hall and David LePage at BC Social Enterprise MeetUp in Vancouver, November 2010. Photo by Peter Roundhill

Several recent events in Alberta and British Columbia provided opportunities to highlight BALTA research.

The BC Social Enterprise MeetUp (November 4-5) brought together 150 people in Vancouver. Recent BALTA research on social enterprises was presented and received with considerable interest by the participants. **Peter Hall** of

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BALTA's Future & SSHRC Application

After several months of development, BALTA has submitted an application to the Social Sciences and Humanities Research Council of Canada (SSHRC) for a new five year research partnership grant. The proposed research program would focus on Sustainability, the Social Economy and Community Transition and run from 2012-2017.

The proposed research would build on important research that BALTA members have

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All articles by Stuart Wulff unless otherwise indicated.	

BALTA's Future

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been conducting on this theme, but would push the work much deeper, strengthening both the theoretical and applied aspects of the work.

SSHRC's partnership grants involve a two stage application process. This first stage application lays out the broad frame of what we are proposing. If it receives approval from SSHRC (and many applicants are competing for a limited pool of funds), we would then have some seed funding and several months to prepare a full application with a fleshed out research program. We expect an answer on the initial application by mid-May.

A broad team of partner organizations and participant researchers has already committed to the new research program, including most current BALTA members and several new ones. Further partners and researchers would be recruited if we proceed to the second stage application.

If approved, the new BALTA program would be hosted by Athabasca University. Four co-leads would represent both the community and academic members of BALTA from both provinces: Alberta – Mike Gismondi of Athabasca University and Noel Keough of Sustainable Calgary; BC – Mike Lewis of the Canadian Centre for Community Renewal and Ana Maria Peredo of the University of Victoria.

This research proposal represents one track in our efforts to continue BALTA in some form beyond our current SSHRC grant. Other research proposals, on other themes, as well as other models for continuing BALTA, may be developed in future.


For further information, contact Stuart Wulff at: balta@xplornet.com 

BALTA on the Road

BALTA has frequently taken the results of our research to audiences in other parts of Canada and overseas. BALTA's lead investigator, **Mike Lewis**, was in Europe in November to present BALTA's research on the impacts of climate change and peak oil on sustainability and community economic development (research that will be reflected in a book, *SEE Change - Navigating the Great Transition in a Volatile World*, being written by Mike and BALTA collaborator **Pat Conaty** of the UK-based New Economics Foundation). This was the latest of several BALTA related trips to Europe for Mike.

Mike presented on the SEE Change work to a forum in Brussels on "Promoting a cooperative territorial economy to combat poverty and social exclusion: From Pactes Locaux to European P'Acts". The forum was sponsored by the Committee of the Regions of the European Economic Community and Mike was invited to present.

Mike then travelled to London to present, along with Pat Conaty, to an audience of UK academics and community peak organization representatives. That meeting included discussion of BALTA's proposed new program on Sustainability, the Social Economy and Community Transition and the potential for UK partners to participate in the research program. Considerable support for the idea was expressed.


BALTA's coordinator, **Stuart Wulff**, was in Waterloo at the end of September to give a presentation on BALTA's research partnership model and research program to graduate and senior undergraduate students in community economic development at Wilfrid Laurier University. 

BALTA Researchers Writing Two Books on Sustainability

Two teams of BALTA researchers are developing books related to sustainability and the social economy.

Members of BALTA's Social Economy Research Cluster (SERC) 2 are developing a book that examines broadly the relationships between sustainability and the

social economy. *Seeds of Transition: The Convergence of the Social Economy and Sustainable Community Development* is to be published by Athabasca University Press. The book is being co-edited by **Mary Beckie**, **Sean Connelly**, **Mike Gismondi**, **Sean Markey** and **Mark Roseland**. Other BALTA researchers are contributing to specific chapters.

SEE Change - Navigating the Great Transition in a Volatile World is being written by **Pat Conaty** and **Mike Lewis** and will be published by New Society Press. It examines a range of strategies for addressing climate change and peak oil, focusing particularly on the role that the social economy and social economy models can play in addressing community transition. 

Update on BALTA's Social Economy Mapping and Portraiture Program

By Mike Gismondi, Athabasca University

BALTA Survey

We have increased the response rate to over 500 organizations. We have also launched a French version of the survey with our partner, le conseil de développement économique de l'Alberta (<https://secure3.athabascau.ca/limesurvey/index.php?sid=55397&lang=fr>). Thanks to **Juanita Marois** in Athabasca and **Ashley Smith** at Simon Fraser University who have worked the phones, adding over 200 responses.

We also collaborated with three BALTA SERC initiated surveys on housing (by **Ron Van Wyk** – soon to be finalized and posted online), social enterprise (**Peter Elson** and **Peter Hall** - <http://hdl.handle.net/2149/2876>), and finance (**Rebecca Pearson** - [http://www.enterprisingnonprofits.ca/resources-search?filter0=&filter1\[\]=17](http://www.enterprisingnonprofits.ca/resources-search?filter0=&filter1[]=17)) to include key mapping questions in their questionnaires, so we could combine some of their data with the main survey findings. This gained us another 100 or so responses.

With our completion rate now at about 25 percent, Lynda Ross and I will be updating the original analysis from 2009 and developing it further. We will share our work with the rest of BALTA in March and seek ideas for effective ways to present findings to practitioners and other researchers.

Case Studies

I also worked with two research assistants (**Celia Lee**, Juanita Marois) and some Athabasca University students to compile 28+ case studies, with one or two more forthcoming.

Students from the Augustana Campus of the University of Alberta have also developed five case studies, including podcast videos (http://augustana.ualberta.ca/programs/lab/international/PACS/multimedia/social_economy.html).

I focused my research on green social enterprises and a few outstanding social enterprises that others have suggested. To date those include: Alberta Wilderness Association; Babes in Arms; Community Natural Foods; Dairy Lane; Good Life Community Bike Shop; Green Calgary; Light House Sustainable Building Centre, Vancouver; MultiCultural Health Brokers Co-operative, Edmonton; Pembina Institute; Plan:Net; Sunnyside Market; The Cleaning Solution; Vastu Chai; SAGE

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Mike Gismondi

New BALTA Research on Land Trusts and Housing

BALTA has launched a second phase of research on land trusts. The new research focuses specifically on potential applications of land trust models to the provision of affordable housing in British Columbia, though the results may have wider applicability. **Lena Soots** has been hired as the student researcher,

working under the direction of **Mike Lewis** and **George Penfold**. This research will build on the initial survey of land trust models that was conducted in 2008-2009 by **Karen Heisler** (see <http://hdl.handle.net/2149/2688>).

The project began with a small workshop in Victoria on February 3 when BALTA researchers were able to discuss possible

applications of land trust models to affordable housing with several local people interested in social housing. **Pat Conaty** presented information about housing land trusts in the UK while Mike Lewis presented on the US experience, particularly that in Burlington, Vermont.

The project will extend until August 2011.🌐

November Events

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Simon Fraser University presented the results of BALTA Project C16 surveying social enterprises in BC and Alberta. **Joanna Buczkowska** of the ISIS Research Centre at UBC presented the results of Project D11, which examined the role of social enterprises in providing employment for people with disabilities. **David LePage** of Enterprising Non-Profits, who participated in both research projects, chaired the session.

Subsequent meetings (November 25) hosted by the Institute for Nonprofit Studies at Mount Royal University in Calgary provided an opportunity to share the Project C16 social enterprise survey results with a Calgary audience.

Peter Elson of MRU, Peter Hall and David LePage presented. Very lively discussions resulted.

BALTA's research on the role of municipal governments in supporting the social economy (Project C10) was presented by **Jenny Kain** of the City of Edmonton during the annual conference of the Family and Community Support Services Association of Alberta (November 26) in Edmonton. 🗺️



Potluck Café provides employment and training for people with disabilities. Photo by Brian Harris for ENP.

Social Enterprises: Creating Jobs and Community Wellness One Small Business at a Time

by Joanna Buczkowska

Employment opportunities and strategies in social enterprises such as Potluck Café and Starworks have provided unique opportunities for marginalized individuals, but policy issues have restrained individuals from easing into full time employment or even part time employment. Recent BALTA research explored how government policy can support social enterprises in hiring and retaining individuals with barriers to employment through financial incentives, enhanced programs and social procurement policies.

BALTA Project D11, examining the **Role of Social Enterprise in Employment Services in the British Columbia Context**, was undertaken by University of British Columbia MBA intern **Samantha Shamash** with ISIS managing director **Joanna Buczkowska** and Enterprising Non-Profits manager **David LePage**. The resulting report looks at the role social enterprises play in employing individuals with physical or mental disabilities, and the obstacles these companies face in providing employment opportunities. The key findings illuminate challenges faced by social enterprises, including the need for increased financial support for greater managerial costs incurred for specialized training, extra staff and supervision. To assist social enterprises in overcoming their business challenges, it is necessary to develop an environment that is more conducive to the growth and sustainability of social businesses. The report outlines six recommendations geared towards industry and policy, including the development of a social enterprise association, a social procurement model, and the necessity of funding for ongoing research in this sector.

To access the report: <http://hdl.handle.net/2149/2890>. For further information, contact: joanna.buczkowska@sauder.ubc.ca 🗺️

Social Enterprises: Significant Employment Creator and Economic Generator

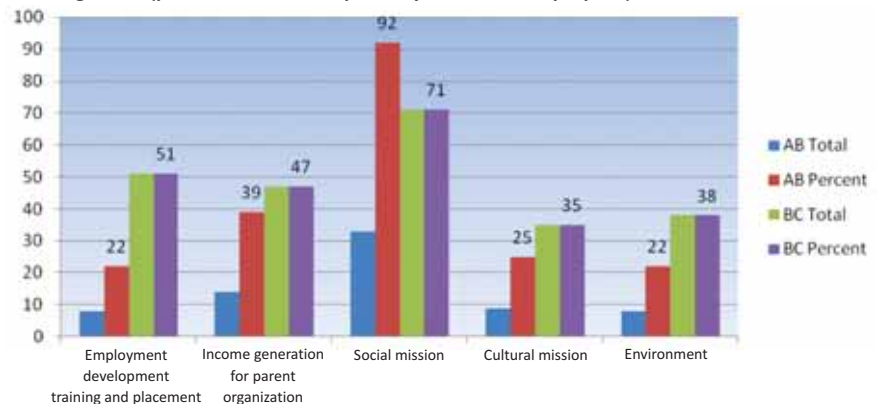
By Peter Elson & Peter Hall

New BALTA research demonstrates that social enterprises, businesses operated by non-profit organizations for the dual purpose of generating income and creating a social, environmental, and cultural value, are significant contributors to both employment creation and economic generators.

The survey research (Project C16) is presented in a report, **Strength, Size, Scope: A Survey of Social Enterprises in Alberta and British Columbia**. It profiles data from 140 of 295 social enterprises in both provinces gathered in the spring and summer of 2010. These social enterprises are engaged in a wide variety of social, cultural, environmental and revenue raising market activities.

Of the total of 4,500 employees, 60 percent or 2,700 employees were members of a designated target group such as persons with a mental or physical disability or a member of a marginalized population. In addition, the social enterprises that responded to the survey engaged 6,780 full- and part-time

Figure G2 (profile of social enterprises by non-exclusive purpose)



volunteers and 27,870 people as members. These social enterprises were responsible for training 11,670 people and providing services to an additional 678,000 people.

The sale of goods and services in the market generated \$78 million in revenue across the two provinces and an aggregate net profit of \$7.9 million in the 2009 financial year. Like other nonprofit organizations, social enterprises solicit non-market funds from a variety of funders, including foundations, government and individual donors.

The authors, **Peter R Elson** of Mount Royal University and **Peter Hall** of Simon Fraser University,

hope that this survey will establish a template for similar surveys of Social Enterprises across Canada and will provide a basis for tracking the progress of social enterprises in Alberta and British Columbia.

Contact:

- Peter R. Elson, Senior Research Associate, Institute for Nonprofit Studies, Mount Royal University, pelson@mtroyal.ca, (403) 440-8722
- Peter Hall, Associate Professor, Urban Studies Program, Simon Fraser University, pvhall@sfu.ca, (778) 782-6691

To access the report:

<http://auspace.athabascau.ca:8080/dspace/handle/2149/2876>

Supporting Social Enterprise in Alberta

by David LePage

Several years ago Enterprising Non-Profits (enp) began investigating replication of our social enterprise development model across the western provinces. We met with local stakeholders, including social enterprises, non-profits, funders, intermediaries and government. While no direct enp related program was developed, we were part of a multi-faceted development of social enterprise support.

Groups like the Edmonton Social Enterprise Fund were leading the way in their community with development supports and investment funding, and adding further influence across the province. The Calgary Foundation and United Way of Calgary invested in research to examine the need and potential (see report at http://www.thecalgaryfoundation.org/SocialEnterpriseInCalgary1_000.pdf.pdf).

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New Research on Faith-Based Organizations

A second phase of research has begun on the role of faith based organizations (FBOs) in supporting the social economy. The research is led by **Bob McKeon** of St. Joseph's Theological College, University of Alberta.

During the initial research on FBOs, two approaches to faith based engagement in the social economy appeared in many of the projects that were surveyed. These were the engagement of the Catholic religious orders (especially the women) and the Mennonite community. This pattern of engagement has prompted this further phase of research.

The research began in October and will extend until June. In addition to SSHRC funding through BALTA, the project is receiving support from the Catherine Donnelly Foundation.

Two individuals, Deb Schrader and Anika Loewen, have been hired to work as research assistants.



Deb Schrader (left) is a doctoral student at the University of Alberta, focusing on adult environmental and sustainability education. She is particularly interested in how considerations for self, society and the Earth can be enacted through non-formal and informal learning. Her professional background circles around environmental and outdoor education and she is an imaginative potter. Deb's research will

focus on Catholic religious orders. She is also working on another BALTA initiative to develop summaries of BALTA research projects.



Anika Loewen (left) is a graduate of MacEwan College's Theatre Arts program and has recently completed the Digital Media Design program at the Northern Alberta Institute of Technology. In addition to her BALTA work, she freelances as a graphic artist, web designer and photographer. Anika is also actively involved in her Mennonite faith community and is supporting the BALTA research related to the Mennonite community.

For further information about the FBO research, contact Bob McKeon at: rmckeon@shaw.ca

Two patterns detected during the initial research into FBOs have prompted this further phase of research.

New Research on Procurement

A second phase of research has begun on procurement and social purchasing. The research is led by

David LePage of Enterprising Non-Profits and **Joanna Buczkowska** (right) of the ISIS Research Centre at the Sauder School of Business, UBC.



Previous BALTA research on procurement focused on models and frameworks. This further research will build on that and look deeper into actual practices. The research began in January and will extend until April.

Caitlin MacDonnell (right), a Bachelor of Commerce student at the Sauder School of Business, UBC, is working as the research assistant on the project. Originally from Smithers, Northern BC, Caitlin will be graduating in 2011. In her free time, she enjoys spending time outdoors and playing hockey.



For further information, contact David LePage at: david@enterprisingnonprofits.ca. Previous BALTA research on procurement has been used to develop an online Social Purchasing Toolkit. See <http://www.enterprisingnonprofits.ca/social-purchasing-toolkit>.

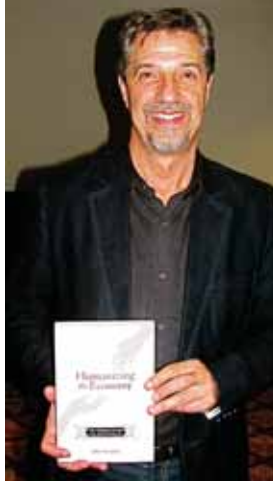
New Book

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and social lives?” he asks. For those who are searching for an alternative, this book clearly shows that there is an alternative.

The co-op idea is an instrument of survival for millions of people worldwide. Restakis says, “For those of us living in privileged countries like Canada the co-op movement is relevant and points a direction for social change, but not in the same way or with the same urgency that it does in places like Sri Lanka and India where co-operation is quite literally a question of survival”. Restakis, the Executive Director for the British Columbia Co-operative Association, uses examples and many wonderful stories of people and communities whose lives have benefited significantly from alternative economic models.

The launch events were co-sponsored by the B.C. Co-operative Association, the Centre for Co-operative and Community Based Economy at the University of Victoria, and New Society Publishers. Copies of the book are now on sale from New Society Publishers. (See box at right for ordering information).🌱



John Restakis displays his new book

Humanizing the Economy

Co-operatives in the Age of Capital

Humanizing the Economy shows how co-operative models for economic and social development can create a more equitable, just, and humane future. With over 800 million members in 85 countries and a long history linking economics to social values, the co-operative movement is the most powerful grassroots movement in the world. Its future as an alternative to corporate capitalism is explored through a wide range of real-world examples.

Highlighting the hopes and struggles of everyday people seeking to make their world a better place, *Humanizing the Economy* is essential reading for anyone who cares about the reform of economics, globalization and social justice.

The author, **John Restakis**, is the executive director of the BC Co-operative Association and a co-investigator in the BC-Alberta Social Economy Research Alliance. A pioneering researcher into international co-operative economies, he writes and lectures on economic democracy and the role of co-operatives in humanizing economies.

Humanizing the Economy (New Society Publishers, 2010) retails for C\$19.95; US\$19.95.

To order, go to:

<http://www.newsociety.com/bookid/4076> 🌱

2011 B.C. CED Gathering

Over 170 people gathered in Vancouver on March 3-4 for a ***Building Leadership to Create Change*** event. The event was sponsored by the BC region of the Canadian Community Economic Development Network (CCEDNet). Several other organizations co-sponsored.

A wide range of workshops and other sessions took place. Several BALTA members were in attendance and BALTA research was cited in workshops on:

- Exploring how Municipal Governments Support Community Economic Development; and
- CED and Social Enterprise – Emerging Issues in Policy, Practice and Research.

For further information, see: <http://buildleadchange.wordpress.com/> 🌱

Upcoming Conferences

- **CU-Expo:** May 10-14, Waterloo. CU-Expo is a conference on community-university partnerships. For information and to register: <http://www.cuexpo2011.ca/>
- **Association for Nonprofit and Social Economy Research (ANSER):** June 1-3, Fredericton. For information: <http://www.anser-ares.ca/conference.php>. To register: <http://congress2011.ca/registration/>
- **Canadian Association for Studies in Co-operation (CASC):** June 1-3, Fredericton. For information: <http://www.coopresearch.coop/conferences/>. To register: <http://congress2011.ca/registration/>
- **International Forum on the Social and Solidarity Economy** – October 17-20, Montreal. For information: <http://www.fiess2011.org/en/> 🌱

Update on BALTA's Mapping

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(Seniors' Association of Greater Edmonton); United Services Co-op (in process); Athabasca Native Friendship Centre; Whispering Hills Daycare Society; Metis Urban Housing Corporation (in process); Serenity Funeral Service; Mountain Equipment Co-op; Alberta Environmental Network Society; Edmonton Community Foundation; Busy B Bargains; City Green Solutions, Victoria; Edmonton Bike Commuters; Vancouver Car Share; Growing Food Security in Alberta; CATCO Car Share, Calgary; Westlock Grain Terminals (NGC).

If any of you have developed any case study reports for BALTA, please forward them to me for the inventory and future cross-case analysis. In March, I will call a meeting of those interested in doing cross case analysis this spring. I am also seeking ideas for creative dissemination, some along the lines of the BC Social Economy Showcase, and others with more facts, figures and analysis.


Contact: mikeg@athabascau.ca 

Supporting SE in Alberta

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Last year BALTA supported a research project to examine the impact of social enterprise in BC and Alberta under the direction of **Peter Elson** of Mount Royal University and **Peter Hall** of the Urban Studies Department at Simon Fraser University (see report at <http://hdl.handle.net/2149/2876>). The BALTA research and the enp social enterprise development model were presented to a gathering of funders in Calgary in late November. One group participating in the meeting and seeing the potential impact of social enterprise was the Trico Charitable Foundation.

Following that meeting enp-bc was invited to collaborate with Trico Charitable Foundation to launch an Enterprising Non-Profits program in Alberta. Enp-ab was officially launched on February 14 (see http://www.tricofoundation.ca/enp-ab_about.php).

Change often happens as a result of many influences that support innovation. The BALTA contribution to the creation of enp-ab is an example of how collaboration among groups that share a purpose can have positive results. 

BALTA

The BC-Alberta Social Economy Research Alliance



BALTA Steering Committee Members

- Mike Lewis, Lead Investigator, Canadian Centre for Community Renewal
- Dr. Mary Beckie, Co-Investigator, University of Alberta
- Dr. Martin Garber-Conrad, Co-Investigator, Edmonton Community Foundation
- Dr. Michael Gismondi, Co-Investigator, Athabasca University
- George Penfold, Co-investigator, Rural Innovation Chair, Selkirk College
- Dr. Mark Roseland, Co-Investigator, Simon Fraser University
- Lena Soots, Students' Representative, Simon Fraser University
- Stuart Wulff, Staff, Canadian Centre for Community Renewal



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