



BALTA

The BC-Alberta Social Economy Research Alliance

BALTA Symposium

January 13-14, 2012

The next **BALTA symposium** will be held in Vancouver on **Friday-Saturday, January 13-14**. This will be the final symposium under BALTA's current funding. The symposium will provide an opportunity to examine and reflect upon the results of BALTA's research and other activities since 2006. BALTA members are encouraged to reserve the dates and plan to attend (funding is available for travel and participation of BALTA members). Others are welcome to attend.

Further information will be circulated in the Autumn.

For those who may be interested, there is another conference in Vancouver that week, the **8th International Conference on Environmental, Cultural, Economic and Social Sustainability**, being held January 10-12. For further information, go to:

<http://onsustainability.com/Conference-2012/> 

BALTA's Social Enterprise Research Gets Replicated Across Canada

BALTA research on social enterprises has been generating considerable interest and follow-up across the country. The results and methodology have been very well received within the social enterprise sector. Efforts are underway to replicate the research in collaboration with a variety of researchers, social enterprise leaders, provincial agencies and foundations.

In 2009-2010 BALTA researchers **Peter Hall** of Simon Fraser University and **Peter Elson** of Mount Royal University led a survey of social enterprises in Alberta and B.C.: "Strength, Size, Scope: A Survey of Social Enterprises in Alberta and British Columbia" - <http://auspace.athabascau.ca:8080/dspace/bitstream/2149/2876/1/BALTA%20C16%20-%20AB-BC%20Social%20Enterprises%20%28Final%29.pdf>.

That research built upon an earlier survey that Hall conducted in collaboration with Enterprising Non-Profits (enp). Hall and Elson have submitted an article on the survey protocol to the Social Enterprise Journal for review. Enp's **David LePage** continues to play a key role in supporting BALTA research and extending it to other parts of Canada.

The research in B.C. and Alberta also drew support from the Social Sciences and Humanities Research Council of Canada and from the Institute for Nonprofit Studies at Mount Royal University.

Hall and Elson are now collaborating with other organizations to support replication of the social enterprise survey in Manitoba, Ontario, and Nova Scotia.

The Manitoba research is being led by **Brendan Reimer** and **Ryan O'Connor** of the Canadian CED Network (CCEDNet) and is

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All articles by Stuart Wulff unless otherwise indicated.

Research Replicated

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nearing completion. Additional supporters of this research are SEED Winnipeg, Assiniboine Credit Union, the United Way of Winnipeg, the Aboriginal Council of Winnipeg, Inner City Renovations, and BUILD (For more details on this research, see the Spring 2011 edition of this newsletter).

The Ontario research is in its early stages. It is being led by **Paul Chamberlain** of CCEDNet with **Jack Quarter** and **Sherida Ryan** of the University of Toronto's Social Economy Centre as the academic partners. The backing from the Centre and CCEDNet has been seconded by the Ontario Nonprofit Network, the Social Purpose Enterprise Network-Toronto, and the Ontario Social Economy Roundtable, with funding from the Ontario Trillium Foundation.

Nova Scotia is yet another setting. There, research was initiated by the Atlantic Council for Community and Social Enterprise (ACCSE) and by The Hub Halifax, with support from the Nova Scotia Department of Economic and Rural Development. **George Karaphillis** of Cape Breton University is the academic partner. **David Upton** of ACCSE and **Joanne Macrae** of The Hub Halifax are the community leads. **Amanda Tarr** is the student research assistant. The team has now begun to analyze its data and to write the research report.

The Social Enterprise Council of Canada has expressed support for the research. It is exploring funding sources that will permit the research to be carried out in the remaining provinces and territories. 🌱

Coming Soon: Website Upgrade

The BALTA website is being substantially restructured to better present the results of BALTA's research. The research will be presented under 17 thematic webpages: Aboriginal Development; Community Economic Development; Co-operatives; Development Systems and Infrastructure; Finance & Markets; Food; Housing; Land and Natural Resources; Mapping/Portraiture; Municipalities and Urban Development; Public Policy and Role of Governments; Rural and Regional Development; Social and Health Care; Social Economy as a Sector; Social Enterprise; Social Innovation; and Sustainability, Environment and Energy.

Other sections of the website are also being revamped to better present information. The revised website will launch in early Autumn. 🌱

Land Trusts Research

The second phase of BALTA's research on land trusts, this time looking at the applicability of land trusts to housing affordability, is continuing. Completion is projected for late November. **Lena Soots** started the project, but with her departure from BALTA a new student researcher has been hired.

Nick Montgomery holds a MA in Political Science and Cultural, Social and Political Thought from the University of Victoria. His research interests include co-operatives and the social economy, food and land, social movements, political theory, post-structuralism, urbanism, capitalism, colonialism, and anarchism. In Victoria Nick is also a community organizer on issues of food sovereignty, gentrification, housing, decolonization, urban sprawl, and cooperative economies. Nick will complete the land trusts research under the supervision of **Mike Lewis** and **George Penfold**. 🌱



BALTA's Jill of All Trades Moves On

Lena Soots was BALTA's first student researcher back in 2006. Since then she has worked on six different research projects/programs as well as development of a course design and modules for a university foundation course on the social economy. She was selected by student research assistants as their representative on the BALTA steering committee. Since 2009 she has also served as BALTA's student program coordinator, providing a range of support to students and BALTA.



But all things must eventually come to an end. Lena resigned from BALTA in July to take up a challenging new role as coordinator of CityStudio (citystudiovancouver.blogspot.com), a collaboration between six post-secondary institutions and the City of Vancouver to engage students in projects that will help the City of Vancouver become the greenest city in the world.

She will be missed! We at BALTA wish her the very best in her new endeavour. 🌱

Social Economy Distance Education Learning Modules


by Mike Gismondi

Over the last year BALTA researchers **Mike Gismondi** and **Mary Beckie** have been working with **Lena Soots** and **Julie MacArthur** to develop a full set of distance education learning modules exploring the social economy.

Eleven of the thirteen modules are drafted. See the list of topics at right. Grouping the modules under themes allows future instructors to integrate new topics.

Each module includes learning outcomes, recommended readings, commentaries, small group and/or individual learning exercises, and supplemental material lists (visual, digital, or written) in support of the learning. A number of potential ideas for assessment (with a practical community focus) are also provided for learners/instructors/facilitators.

The commentaries are written in plain language. Each module is designed to accommodate two categories of users: students with university library access, and those others with access to only public library resources and the Internet. In each module, we provide sources and digital references to electronic books and journal articles held in university libraries, as well as e-links to publicly accessible digital sources on the same topics. A community facilitator or a community resident, for example, would be able to work through the materials on their own or engage a group in a high level discussion using only public access materials, even if they could not access resources from a university library.

Mary and Mike are also trying to negotiate with university librarians, and with publishers, other ways to provide public access to the academic journals and ebooks for those wanting to pursue the social economy learning materials. We expect to have the **BALTA Social Economy learning materials** ready for your use by Spring 2012. 

Course At-A-Glance

DISTANCE EDUCATION: THE SOCIAL ECONOMY

Unit 1: Context, Definition & Conceptualization

- Module 1: Context and Definition
- Module 2: Organizational Form
- Module 3: Mapping the SE – Canadian Portrait
- Module 4: Community-Based Research Methods

Unit 2: Support and Infrastructure

- Module 5: Redefining Progress – Measurement, Indicators and Social Accounting
- Module 6: Finance, Investment and Capital
- Module 7: Policy, Partnerships and the Role of the Public Sector

Unit 3: Special Topics

- Module 8: Affordable Housing & Human Services
- Module 9: The Green Social Economy – Addressing Sustainability
- Module 10: The Green Social Economy – Food, Energy and Community Resilience


Unit 4: Perspectives

- Module 11: Issues of Work, Gender and Culture
- Module 12: Global Perspectives
- Module 13: Innovations and Future Directions

Research Funding Opportunity

by Peter Elson

The Institute for Nonprofit Studies at Mount Royal University is inviting applications to its applied research fund. Two proposals will be funded to a maximum of \$7,500 each. Applications should address practical issues in the areas of nonprofit governance, sustainability or policy. **Letters of Intent are due on October 14th and full proposals will be due on November 14th.**

The full application form is available on request. More information and previously funded research are profiled in the applied research section of the Institute web site: <http://www.mtroyal.ca/nonprofitinstitute> 



Social Purchasing

Every purchasing decision creates a ripple ...

by David LePage

Following the initial release of the Social Purchasing Portal (BALTA Project C18) one key question arose from interested groups: “How do we actually implement a social purchasing policy?” In response Enterprising Non-Profits and the ISIS Research Centre at UBC initiated a follow-up project to research and construct a sample evaluation tool for implementation of social purchasing practice.

The scorecard is designed for use when creating and evaluating Requests for Proposals (RFPs) for goods and services.

Sustainable purchasing is getting wider attention, but still tends to be composed of three elements: price, quality, and green. Proper sustainable purchasing should also include a social value component and we are seeing, both internationally and in some Canadian contexts, increasing consideration of social impacts when making purchasing and procurement decisions. Slowly it is gaining traction in personal, institutional, corporate, and government supply chains.

Local purchasing is definitely the best example, as we see more farmers markets emerge and an increase in local purchasing initiatives. One means to achieve social value is purchasing directly from social economy businesses — social enterprises, co-operatives and social purpose businesses — because they have already integrated a social value into their blended bottom-line. But the major emphasis to date is consumer examples, which do not translate easily to large institutional purchasers who have intricate and complex processes. This new tool is aimed at those groups that want to implement a social purchasing score card into their procurement practices. The scorecard is designed for use when creating and evaluating Requests for Proposals (RFPs) for goods and services.

The scoring process requires suppliers who submit bids, proposals, quotations or tenders to complete a questionnaire which asks about their current socially responsible practices, what practices they plan to implement in order to win the specified contract, and how they will measure and report on their execution of the proposed social outcomes. The scoring can include the specific project, sub-contracting and related social value components of the supply chain.

Five easy steps:

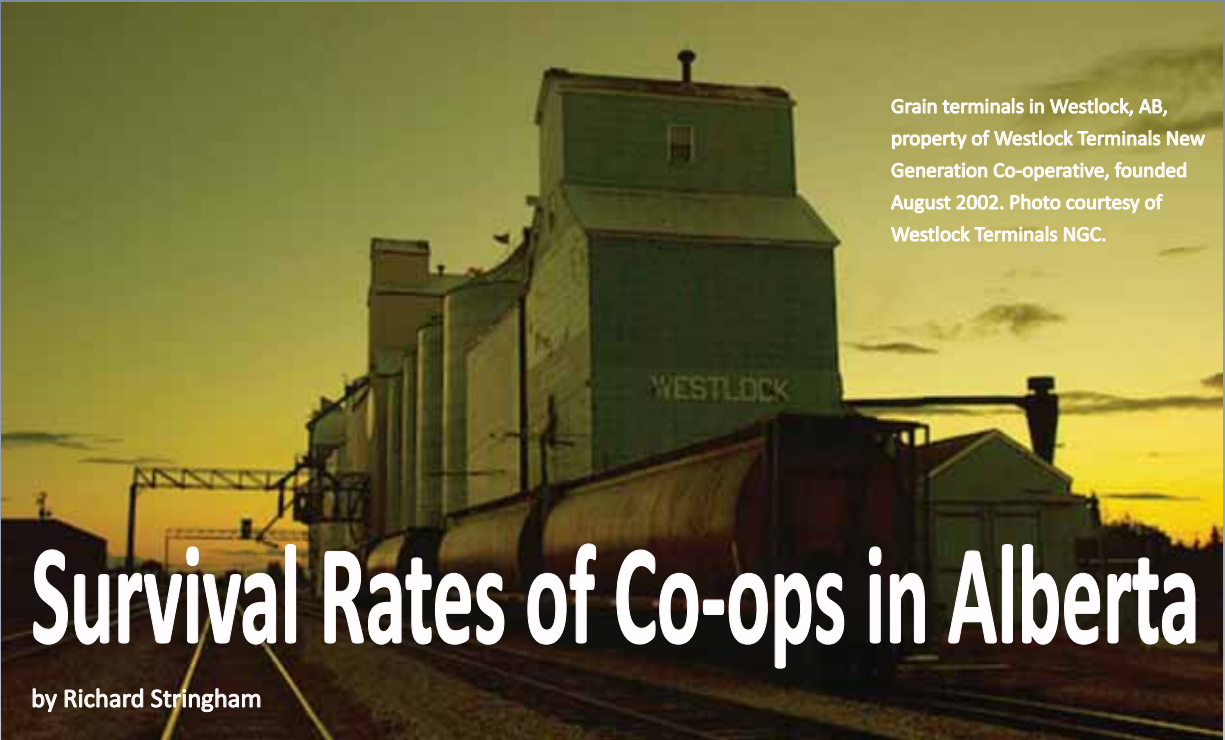
1. Define what you want to measure: Local purchasing? Training for employees? Hiring of targeted groups, such as youth, immigrants, etc.? Inclusion of social enterprise sub-contractors?
2. Score the proponents offering: We suggest a range of 1 to 15, where 1 is low and 15 is high.

The scoring process requires suppliers who submit bids, proposals, quotations, or tenders to complete a questionnaire which asks about their current socially responsible practices.

3. Decide on the weighting value of each component: How important is this piece of your social objectives? Give it a specific weighting percentage.
4. Score each component: Score times weighting = score.
5. Add the component scores into a final social impact value.

This procurement process results in an evaluation of all bids on a four-segment framework: price, quality, environment and social value. Using the process can create a positive ripple effect through existing purchasing.

For the full **Social Purchasing Toolkit** you can go to <http://www.enterprisingnonprofits.ca/e-library-resources/social-enterprise-purchasing-toolkit>. 📄



Grain terminals in Westlock, AB, property of Westlock Terminals New Generation Co-operative, founded August 2002. Photo courtesy of Westlock Terminals NGC.

Survival Rates of Co-ops in Alberta

by Richard Stringham

The second of two parallel BALTA studies on the survival rates of co-ops has just been completed. The first study looked at co-op survival in B.C. (as reported in the Spring 2011 edition of this newsletter, p. 4). This second study looks at co-ops in Alberta. In addition to survival rates, the study looked at factors influencing survival, including the reasons for dissolution, and made recommendations for consideration by planners and policy makers.


The survival rate of co-ops compared to conventional corporations in Alberta was 94% to 75% for one year; 84% to 59% for two years; and 81% to 48% for three years, i.e., co-ops had significantly higher survival rates than conventional corporations and this co-op advantage increased with the length of incorporation.

Generally, survival rates for co-ops operating in the same field of activity and manner as significant numbers of other co-ops (i.e., water and sewage, and housing co-ops), were markedly improved from co-ops which were more unique and presumably innovative in their purpose, market, and/or structure. Further information from online surveys and phone interviews supports the notion that innovative co-ops have additional challenges when compared to other groups.

External factors were cited as the greatest cause for failure of co-ops, particularly substantial shifts in markets and demands of regulators.

The following are the study recommendations:

1. Consider who is falling through the cracks both in regards to awareness of existing resources and lack of access to resources;
2. Centralize and coordinate access to resources to minimize the time needed to search for various resources needed.
3. Improve communications to clarify the roles different agencies play in co-operative development and to build trust in relationships.
4. Advocate on behalf of developing co-operatives to address their challenges regarding regulations that they do not have time or resources to address.
5. Enhance access to start-up capital with tools such as a venture capital fund and an innovations fund focused at co-operatives.
6. Develop capital and membership relations vehicles which are better suited to the needs of housing co-ops.

For more information on the study “Co-op Survival Rates in Alberta,” contact **Richard Stringham** at: coopdev@acca.coop 

Faith-Based Organizations Engaged in the Social Economy

The Example of Catholic Religious Orders and the Mennonites

by Bob McKeon

Faith-based organizations (FBOs) are making significant contributions to the social economy sector in Canada. This study is the second BALTA research project looking at the role of FBOs in the social economy. It looks specifically at the approaches of Catholic religious orders and Mennonite community outreach organizations in their social economy projects.

Both of these approaches have stood the test of time and have been replicated in different regions of Canada. Both of these approaches are deeply grounded in spirituality and faith practices of a specific religious tradition, yet their community projects consistently invite the participation of a wider public of diverse faith backgrounds. While the theology and church organization of the Mennonites and the Catholic religious orders are quite distinct, the social economy approaches coming from these two traditions were found to have much in common.

For the Mennonites, this study looks at the social economy animation of the national and provincial Mennonite Central Committee organizations (MCCs) and the Mennonite Economic Development Association (MEDA). Specific social economy projects organized through these Mennonite organizations are studied including Momentum in Calgary, Communitas in B.C. and Sam's Place in Manitoba.

The contributions of the Catholic religious orders are examined through specific case studies including the

Sisters of Service of Toronto and the Sisters of St. Joseph of London. Specific projects supported by the Catholic religious orders examined include Edmonton Inner City Housing Society in Edmonton and the Canadian Alternate Investment Cooperative based in Toronto.

Several overarching themes of the social economy approaches of the Mennonite organizations and the Catholic religious orders are identified:

- an integrated global-local approach;
- working from a critical social analysis and a wider commitment for social change;
- working from within a community of shared value and mutual support;
- respecting the ethical and spiritual dimensions of community development animation;
- having trust in the community development process and not being overly attached to predetermined outcomes.
- Also identified was a growing ecological awareness associated with their social economy initiatives.

These themes are identified as “success factors” in the social economy work of the Catholic religious orders and Mennonite organizations that can contribute to the work of all active in the social economy sector.

For further information, contact **Bob McKeon**, the lead researcher, at: rmckeon@shaw.ca 

International Journal of Wellbeing

The International Journal of Wellbeing, launched in January 2011, has released a special issue on “Felicitors - celebrating people, places and institutions that have made lives better.” BALTA associate **John Helliwell** is a contributor and co-editor of the special issue. The Felicitors issue addresses the important role of social enterprises and similar means of building social connections to good purpose.

The special issue and all IJW content is available free at: <http://www.internationaljournalofwellbeing.org/> 



(photo) **Mike Lewis** (at left) was in the UK in July, the latest of several visits to the UK to consult with UK organizations about aspects of BALTA's research, especially with respect to community adaptation and sustainability in a context where volatility stemming from climate change, peak oil and financial instability are increasing. Mike spoke at a seminar in London on July 1, "Co-operative Tools for Reinventing Garden Cities." The seminars were sponsored by the U.K. Co-operative Federation. He, **Pat Conaty** of the New Economics Foundation (at right), and **Shann Turnbull** from Australia also met with a new activist member of the House of Lords.

Mike and Pat also spent time working in Wales. They are collaborating on the writing of a BALTA-supported book on strategies for adapting to climate change and peak oil through reinventing our economies on a more local and regional basis. The book, *The Resilience Imperative*, is nearing completion and will go to New Society Publishers in the early Autumn. It will be published in the spring of 2012.

Bob Ward Social Enterprise Capital Fund

Bob Ward (below, right), the first executive director of the Edmonton Social Enterprise Fund, died of a heart attack on June 29. To commemorate his many contributions over the years to community development, the Edmonton Community Foundation has established the Bob Ward Social Enterprise Capital Fund to support social enterprise development in Edmonton.



Donations can be sent to: Edmonton Community Foundation, 9910 – 103 Street, Edmonton, AB, T5K 2V7. ☺

BALTA TEAMS with i4 ejournal

by Don McNair

The Canadian Centre for Community Renewal has launched a web-based journal about community resilience and transition, *i4*. It concerns the efforts of people in Canada and around the world to meet four imperatives: to **Inspire**, **Innovate**, **Incite**, and **Invent** ways of life and work that permit both humanity and the planet to thrive in a time of peak oil and climate change.

i4 is written primarily by and for people committed to crafting creative, democratic, and sustainable economies. Whether managers, directors, researchers, activists, or thinkers, they are the "doers," not spectators. Some write about local food, social finance, or renewable energy. Others about community resilience and transition, about poverty reduction, community economic development, or co-operatives. Still others tackle issues from the perspective of environmental responsibility or public policy.

We urge them all to give readers the "straight goods": what's happening, what's working, what isn't, why – and what's next.

i4 has teamed up with BALTA to publish coverage relating to the vast amounts of research that the network has coordinated on the subject of social economy. Download "Scaling Up Local Food" by BALTA researcher **Sean Connelly** from <http://communityrenewal.ca/scaling-local-food>. A series of articles on initiatives in affordable housing is also nearing publication. Download the first installment, by BALTA lead investigator **Mike Lewis**, "Kirkless, UK: An area-based approach to energy efficiency, housing affordability, and jobs," from <http://communityrenewal.ca/kirklees-uk>.

For the heads-up on the rest of this series, and other *i4* coverage, visit <http://communityrenewal.ca/subscribe-to-i4> and subscribe. It's a free publication. ☺

Register for FIESS 2011!

The **International Forum on the Social and Solidarity Economy 2011** will focus on the need for dialogue between the state and civil society to develop enabling public policy in favour of the social and solidarity economy. The event will showcase the richness of the social and solidarity economy throughout the world, the diversity of its experiences and the innovative character of its enterprises, as well as the numerous partnerships that have been built between public authorities and civil society.

To download the FIESS 2011 program or to **register**, go to: www.fiess2011.org/en/

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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
- Stuart Wulff, Staff, Canadian Centre for Community Renewal

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BALTA Staff



Stuart Wulff, Coordinator,
PH: 250.723.2296 or Email: balta@xplornet.com
9777B Somers Road, Port Alberni BC V9Y 8N9



Don McNair, Communications
PH: 250.542.7057 or
Email: mcnair@cedworks.com