

B.C.- Alberta Social Economy Research Alliance (BALTA)

Project Proposal – Project A8-2009

A. Title of project:

CREATING A DATABASE OF SOCIAL ENTERPRISE CAPITAL PROVIDERS IN BC AND ALBERTA

**B. With which BALTA SERC Is this project associated? Or is it a cross cutting project?
SERC 1**

C. Lead researcher, organization name and contact information:

BC Lead: Rebecca Pearson, Vancity, Rebecca.Pearson@Vancity.com

Alberta Lead: Kim Pasula, Community Capital/CCED-Net, bcc@incentre.net

D. Names of other researchers and organizations involved:

This project began as a BC-focused project, which was then expanded to include Alberta per feedback from BALTA. As such, the BC advisory group is quite strong, but the Alberta group has not yet formed. Forming an Alberta advisory group will be part of the Alberta team lead's work over the next couple of months. SERC 3 member, Peter Elson, has expressed interest in linking with the Alberta advisory group.

Centre for Sustainability and Social Innovation (CSSI) Team for this project:

Professor James Tansey

Joanna Buczkowska, Managing Director

BC Social Enterprise Summit (BCSES) Team for this project:

Philip Lee, Western Economic Diversification Canada

Phyllis Chivers, Consultant

The other members of the BCSES Access to Capital subgroup include:

Art Lew – Haida Gwaii CF

Michelle Colussi – CCE

Kim Hardy – Ecotrust

Cindy Pandini – BC Social Venture Partners

Carol Murray – BCCA

Heather Edgar – Coast Foundation and operator

Nicole Chaland – CedNet

E. Description of project, including objectives, outputs and intended outcomes:

To build a database of funders/investors in the social economy in BC and Alberta. The database would include a number of searchable criteria, including funders' mandates, target groups, type of capital, and stage of development they support (emerging / established / evolving). The database would be web-based, with the intention of creating a living document that could be continually used and updated.

This database would enable connections between social economy practitioners (capital seekers) and the best capital providers for their needs. A side benefit would be the ability to

identify gaps in the type and amount of capital that is currently provided, as compared to the practitioners' needs.

This project grew out of three separate existing projects:

- First, a BALTA research project was conducted, describing the current state of the nonprofit capital market. This proposed project (A8) would be a natural follow-up to the BALTA paper, as it would provide a much greater level of detail than a research paper could achieve into the current state of the market.
- Then, Enterprising Nonprofits held a B.C. Social Enterprise Summit in November 2008. One of the outcomes of the summit was the need for a database of capital providers to social enterprise in B.C. (see attached report), to facilitate investment in social enterprise.
- Lastly, a member of the project team was independently developing a proposal for a web-based database of social purpose capital providers, similar to a social networking site, called FundersTable. This project is now in beta testing, with a planned launch of January 2010. If the timeline is met, this technology could serve as the platform for this project. If that project does not go forward, we could use a more traditional database format.

F. Purpose and significance of the research, including congruence with the strategic research objectives identified for the SERC and BALTA. Why should this project be approved, given BALTA's limited resources?

This project has the following objectives, which are directly relevant to BALTA's strategic research objectives:

- To better understand the current state of the social economy capital market
- To create a tool to better connect individual enterprises within the social economy to enabling infrastructure (capital market members/providers)
- To better understand opportunities and constraints for capitalizing successful social economy enterprises in BC and Alberta on a larger scale
- To leverage current social economy assets and resources to scale up exemplary practices and stimulate social innovation
- To contribute to the building of relationships and alliances amongst capital providers, enterprises, and associated members of the social economy
- To build upon and add to BALTA's social economy mapping achievements to date

G. Will the project involve student researchers in a paid or unpaid capacity? If yes, will they need to be recruited or have they already been identified? Briefly describe the roles and responsibilities of students involved in the research project, the skills/experience they will acquire, and how this will complement their academic training. Explain as well how adequate supervision and support of the student will be ensured.

Two paid students, one in Alberta (undergraduate) and one in BC (graduate), are envisioned for this project. Their role would be to aid in the development of the database and, most importantly, the population of the database. Specifically, they would aid the lead researchers in

identifying and contacting social economy capital providers, and ensuring that the providers' data is accurately input into the database.

Supervision would be provided by Rebecca Pearson and Joanna Buczkowska at CSSI in BC, and Kim Pasula in Alberta. Outcomes for the student would include a better understanding of social economy actors in B.C. and Alberta and networking with said actors.

H. Research activities, plan of work and timetable:

A specific work plan is in progress. However, the basic steps are:

- develop the database technology (in process, estimated completion January 2010)
- identify social economy capital providers (in process for BC)
- upon completion of the database, populate the database and encourage its use (start date January 2010, estimated completion March 31, 2010)

I. Describe plans for communicating research results outside the academic community to practitioners, policy makers, and other people for whom the research results could be significant. Indicate audience and specific output(s).

Because this project is the result of a number of different partners with similar goals coming together, each partner is highly motivated to disseminate the results to their respective communities.

Enterprising Nonprofits, the organizer of the annual BC Social Enterprise Summit, is very supportive of the project and has already committed to disseminate the results. There is an e-mail list of BCSES participants and a webpage that can be utilized for raising awareness of this project.

The Alberta team will identify appropriate channels of communication in their province.

J. Describe your plans for monitoring and evaluating your research project.

To ensure that the project is meeting BALTA's goals, the following monitoring and evaluation tools will be utilized:

- weekly supervision of student
- monthly team meetings
- student evaluation
- final report will be submitted to BALTA

K. What are the research tools you propose to use in your project?

NOTE: If your research involves human subjects, you MUST provide copies of your proposed research tools (as well as your research plan) prior to commencing research. Please see the document "BALTA Ethical Review Process – Simplified" for information about ethical review requirements.

- Interview and survey
- Interview guide and surveys will be submitted for ethical review

L. Budget and Contributions

Information can be both dollar figures and anecdotal, including in-kind contributions and requests for BALTA support (eg. staff support for dissemination).

Category	Requested of BALTA	Other Contributions
----------	--------------------	---------------------

2 x Student salaries	\$4,680	50% of BC student covered by CSSI = \$1,800
Student benefits/overhead costs (if the student will be a CCCR hire, add 10.5% of the student salaries amount; if the student will be employed by another institution, add the relevant amount)	\$492	50% of BC student covered by CSSI = \$189
Researcher Release Time		20 days x \$400 = \$8000
Research Support Costs (e.g. supplies, communication costs)		Vancity and/or CSSI can cover phone costs for BC student
Knowledge Dissemination		ENP and/or CSSI will provide for BC
Travel	none	
TOTALS	\$5,172	

Budget explanation

Student salaries & benefits

1 undergraduate student (in AB), part-time for 12 weeks
 $\$16/\text{hr} \times 15 \text{ hrs/wk} \times 12 \text{ weeks} = \$2,880$

1 graduate student (in BC), part-time for 10 weeks
 $\$20/\text{hr (est.)} \times 18 \text{ hrs/wk} \times 10 \text{ weeks} = \$3,600$

Travel – I don't expect travel to be required

I expect that small incidental costs could be covered by the partners (Vancity, CSSI, ENP, CED-Net, etc)