

BALTA BITS & BITES

September—October 2007

Volume 1, Issue 1

MIKE'S MUSINGS

Mike Lewis is the director and lead investigator of the BALTA Research Alliance.

Mike's Musings is a regular column featuring

Mike's reflections on the progress and critical issues facing BALTA.



Welcome to the first newsletter of the BC-Alberta Social Economy Research Alliance (BALTA). It has been awhile coming. What a process it has been to lay the cornerstones of what I believe is evolving into a practitioner-researcher-university platform that can actually make a difference to strengthening our communities and the social economy.

Few outside a small circle of activists and academics had heard the phrase, 'social economy', four years ago. Now we have a research alliance with a wide range of CED, co-op, university and Aboriginal partners working in a wide variety of projects.

The steering committee of BALTA met for the first time in May 2006. Some 17 months later, after the intense work involved in finding our ground and building our relationships, we have 19 projects completed or under way, each
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BALTA LAUNCHES 2007-2008 RESEARCH PROGRAM

BALTA's members have planned and begun implementing an ambitious program of research projects for 2007-2008. While a small number of projects were implemented in 2006-2007, the focus during BALTA's first year was on building a common understanding of the research priorities and developing research plans for subsequent years.

Two planning forums were held: October 2006 and January 2007. BALTA's members met for two days in each case, spending most of their time in the three Social Economy Research Clusters (SERCs) that have been formed to guide the research program. These are:

SERC 1 – Social Enterprises in Human Services and Housing
SERC 2 – The Social Economy in Rural Revitalization and Development
SERC 3 – Analysis, Evaluation and Infrastructure

The results of these meetings led to workplans for each SERC that identified broad multi-year research priorities and detailed research plans for 2007-2008. See page 3 for a summary of research projects.

See the BALTA website for the SERC workplans and project plans.

<http://www.socialeconomy-bcalberta.ca>

MAPPING PROGRAM

by Mike Gismondi

[The framework for BALTA's program to 'map' the social economy in Alberta and B.C. has been gradually taking shape over the past year, spearheaded by a small committee consisting of Lena Soots (student), Sandy Lockhart and Mike Gismondi. Mike provides here a short update on the mapping program.]

The mapping committee has gone through a few drafts of the survey tool for Phase 1 of the mapping. Thanks are due to Sandy Lockhart and Lena Soots for their guiding work. The online survey will have about 30 questions and should take about 20 minutes to complete. In addition to stan-

dard questions about an organization, we will be asking about environmental focus (if any), gender, governance, finances, geographic reach and scale and number of employees. The survey also identifies the role of intermediary agencies. The BALTA Steering Committee and Canada Research Chair Marie Bouchard at the University of Quebec gave us good feedback on the survey. The survey is now in pre-test and ethics review. We hope to go live in November.

We have been building a master list of agencies to approach to fill out the survey. Sampling work has been slow because of privacy issues protecting the SE umbrella organization lists, but contractor, Anna Bubel from *Another Way*, has done a great job convincing
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BALTA
B.C.-Alberta Social Economy Research Alliance



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Senior Student Plays Key Role in BALTA

by Sara-Jane Brocklehurst

Lena Soots joined BALTA in September 2006, making her BALTA's first hire of a student research assistant. She was introduced to BALTA through her PhD supervisor at Simon Fraser University, Dr. Mark Roseland. Mark is a member of the BALTA steering committee and co-chairs the Social Economy Research Cluster focusing on the Social Economy in Rural Revitalization (SERC 2).

Lena was hired to work on the development of BALTA's framework for mapping of the social economy in Alberta and B.C. Having worked on this project for a full year she is transitioning out and starting work with Dr. Mike Gismondi, a BALTA co-investigator from Athabasca University, on a SERC 2 project on Sustainability and the Social Economy. In addition, Lena worked on a SERC 3 (Analysis, Evaluation and Infrastructure) project, a case study of the Nova Scotia co-operative development system.

With Lena hoping to complete her doctoral program in 2011, her PhD aligns nicely with the span of the BALTA project. She is doing her PhD in Human

Geography and works most directly with the Centre for Sustainable Community Development at Simon Fraser University. Lena's background includes a Master's in Environmental Studies at the University of Waterloo and a Bachelor of Environmental Policy and Planning at Trent University. She loves teaching and research and has aspirations for an academic career.

Lena is still in the process of defining her thesis, but she is "looking at the role of social enterprise in community revitalization and sustainable community development." This links closely to the work of SERC 2, providing an opportunity for Lena to carry out research in conjunction with BALTA and for BALTA to benefit from her research. "I hope to have my research be directly relevant to the BALTA project," she said.

Lena is enthusiastic about her experience to date. "The BALTA experience has been providing me with skills that I will carry with me into my career," Lena said.

Even though the mapping work was not directly related to Lena's thesis,

she found managing a fairly major project and learning how to design research to be a fascinating experience.

Lena Soots and her dog



Sandy Lockhart, Professor Emeritus at Trent University and BALTA member, has been supervising Lena's work on the mapping. He states: "I would place Lena in the top decile of the brightest, most energetic and productive (of graduate students)."

Lena values the interesting mix of academics and practitioners in BALTA. She believes that it is important to focus on both sides since the academic contributions, although of great importance, need to be applied in the field to truly be of value. Lena believes that BALTA will leave a legacy that will carry on after its conclusion.

BALTA is very lucky to have the enthusiasm and skills of Lena within its research team. "BALTA has been very fortunate in its initial graduate student," stated Sandy Lockhart.

SUPPORTING INNOVATIVE CO-OPERATIVE DEVELOPMENT:

THE CASE OF THE NOVA SCOTIA CO-OPERATIVE DEVELOPMENT SYSTEM

by Lena Soots

During January to March 2007, I undertook a case study of the Nova Scotia co-operative development system under the guidance of Stewart Perry and Mike Lewis of BALTA. The case study was designed to understand a recent history of active and successful innovation and development in the co-operative sector of Nova Scotia that has been unparalleled in Anglophone Canada. This research was initiated to contribute to one of the goals of BALTA – to highlight "the scope and characteristics of social economy innovations that are achieving demonstra-

ble social and economic results in other regions" in order to provide insights for strengthening the social economy in BC and Alberta.

The case study looked at the NS Co-operative Development System (NS-CDS) from a systems perspective in order to encompass a wide range of interacting processes that are involved in the Nova Scotia experience. The NS-CDS case study looked at 6 main areas:

- Development Finance
- Human Resource Development
- Planning, Advocacy and Research

- Policy and Governance
- Community Economic Development
- Accountability and Evaluation

I spent 7 days traveling between Halifax and Truro interviewing actors in the co-operative development system, from government officials to co-op members, co-operative development agencies and advocates. Dianne Kelderman and Fred Pierce of the Nova Scotia Co-operative Council were gracious hosts and provided office space as well as invaluable in-

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BALTA'S RESEARCH PROJECTS

Project Area	Project Title	Project Lead	Student	Timelines	Status
SERC #1: Social Enterprises in Human Services and Housing Co-chairs: John Restakis, George Penfold	Innovative Use of Housing Co-operative Assets	Card Murray	Rebecca Pearson MBA-UBC	June 07 - Mar 08	In progress
	Co-operative Models of Social Care	John Restakis	Allison Dunnet-Holzer Master's - SFU	Sept - Dec 07	In progress
	The Social Purpose Capital Market in B.C. and Alberta	Jenny Kain Martin Garber-Conrad	TBA	Jan 08 - June 09	Pending until 2008
	Role of Faith Based Organizations in the Social Economy	Bob McKeon	TBA	Sept - Dec 07	Student hiring pending
SERC #2: The Social Economy in Rural Revitalization and Development Co-chairs: Mark Roseland, vacant	Understanding the Role of the Social Economy in Advancing Rural Revitalization and Development	AB - Mary Beckie BC - Sean Markey	AB - Wendy Aupers Master's - AU BC - Billy Collins Master's - SFU	June 07 - Mar 08	In progress
	Sustainability and the Social Economy	Mke Gismond	Lena Soots PhD - SFU	June 07 - Apr 09	In progress
SERC #3: Analysis, Evaluation and Infrastructure Co-chairs: David LePage, Jorge Sousa	Summary of Quebec Policies that are Supportive of the Social Economy	Mke Lewis	Ralph Rouzier	Nov - Dec 06	Complete
	Nova Scotia Co-operative Development System Case Study - Phase One	Mke Lewis	Lena Soots PhD - SFU	Jan - Mar 07	Complete
	Preliminary Profile of the Size and Scope of the Social Economy in Alberta and B.C.	Jorge Sousa	Evelyn Hamdon Master's - UofA	May - Oct 07	Project nearing completion
	From Social Economy to Solidarity Economy: Changing Perspectives in a Volatile World - Phase One	Mke Lewis	no student	Apr - Jun 07	Complete
	From Social Economy to Solidarity Economy: Changing Perspectives in a Volatile World - Phase Two	Mke Lewis	no student	Jul - Aug 07	Complete
	Nova Scotia Co-operative Development System Case Study - Phase Two: Analysis of Application in BC	Mke Lewis John Restakis	TBA	Oct 07 - May 08	Approved to move forward
	GED and Social Economy Policy Inventory in BC and Alberta - Phase One	Jorge Sousa	Zane Hamm PhD - UofA	Sept 07 - Apr 08	In progress
	Municipal Government Support of the Social Economy Sector	Mke Gismond	TBA	Oct 07 - Apr 08	Job Posting deadline Oct 26th
Credit Unions as a Financing Source for the Social Economy	Stewart Perry	William Kendal Master's - SFU	Sept - Dec 07	In progress	
Cross-cutting Projects	Literature Reviews for SERC 1, 2 & 3 Themes	Mark Roseland	Rob O'Brien - Master's - SFU Andre Vallilée - Master's - UBC Robyn Haslip - Master's - SFU	Jan - May 07	Complete
	Leveraging Social Ownership of Proprietary Goods and Services related to the Golden Mussel to Expand Social Enterprise in Coastal BC Aboriginal Communities	Doug Gordon	Nadine Pinnell Master's - SFU	Jul 07 - Jun 08	In progress
Mapping Projects	Mapping Framework Development	Sandy Lockhart Mke Gismond	Lena Soots PhD - SFU	Sept 06 - Feb 07	Complete
	Mapping the Social Economy in Alberta and BC - Phase 1	Mke Gismond	Lena Soots PhD - SFU Julia Affolderbach PhD - SFU	Mar - Sept 07 Sept 07 - Apr 08	In progress Hiring of 2nd student in progress
Evaluation	Evaluation and Monitoring	Stuart Wulff	Karen Heisler PhD - SFU	Sept 07 - Feb 11	In progress

SFU = Simon Fraser University, UBC = University of BC, AU = Athabasca University, UofA = University of Alberta

EDMONTON LAUNCHES SOCIAL ENTERPRISE FUND

Two BALTA partners – Edmonton Community Foundation and City of Edmonton – have come together to support an exciting new social economy initiative in Edmonton.

On April 24 Edmonton's City Council approved a \$1.8 million allocation towards establishing a Social Enterprise Fund. These funds will be matched with donor funds through the Edmonton Community Foundation, which will manage the new funding program. City Council also agreed to consider a further \$1.8 million allocation in the 2008 City budget.

The SEF is designed to meet the financing needs of social enterprise operators in a way that mainstream financial institutions and philanthropic grant-making programs do. It will offer a unique blend of supports to the development of social enterprises in the city – loans, technical assistance grants, investments and other forms of financing. The SEF will provide loans for the start-up and expansion of social enterprises operated by Edmonton's charities and interim financing for affordable housing projects.

Edmonton Community Foundation

CEO, Martin Garber-Conrad, emphasizes that "the SEF is the financing tool needed to ensure social enterprises succeed and affordable housing projects are built."

The SEF is aiming for \$10.5 million of capital within 5 years. Promising discussions have already been held with other institutions and levels of government with regards to investing in the SEF.

For further information, contact **Martin Garber-Conrad:**
martin@ecfoundation.org

LITERATURE REVIEWS PROVIDE CONTEXT FOR BALTA RESEARCH

The Centre for Sustainable Community Development (CSCD) at Simon Fraser University took the lead in organizing broad literature reviews examining the core themes addressed by BALTA's three Social Economy Research Clusters (SERCs). These literature reviews were undertaken in order to map and understand the existing field of knowledge in the research areas being addressed by BALTA:

- SERC 1 – Social Enterprises in Human Services and Housing
- SERC 2 – The Social Economy in Rural Revitalization and Develop-

ment

- SERC 3 – Analysis, Evaluation and Infrastructure

Three CSCD linked BALTA members (Dr. Mark Roseland, Dr. Sean Markey and Dr. Peter Hall) provided leadership for the project and supervised the three students doing the literature reviews.

The project began in January 2007 and concluded by early May. The students conducting the reviews were:

- SERC 1 – Rob O'Brien – Master's in Public Policy, Simon

Fraser University

- SERC 2 – Andre Vallillee – Master's in Community & Regional Planning, University of British Columbia
- SERC 3 – Robyn Heaslip – Master's in Resources & Environmental Management, Simon Fraser University

All three reviews will be available on the BALTA website by early November:

<http://www.socialeconomy-bcalberta.ca>

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people of the importance of participating. Jenny Kain and colleague, Krystyna, City of Edmonton (a BALTA partner), have been helping. Krystyna has been typing lots of lists - Many Thanks. We expect to have identified between 2500 and 3000 SE organizations by the end of October.

Jenny's colleague, Bart Szopiak, City of Edmonton, put the survey online using Vovici software (http://www.vovici.com/lp/survey_powered.asp?ref=survey-pw&).

We will be writing all of you with the Internet address of the BALTA survey when we go live, asking you to encourage all the agencies you deal with to fill in the BALTA survey.

In the summer we hired a new senior mapping student researcher, Julia Afolderbach, a doctoral student at SFU. Julia started with us part-time over the summer (while becoming a new Mom - Congratulations) and has now come fully on board. Lena Soots, who has carried the mapping role till now (and will be mentoring Julia) is moving on to concentrate on her SERC 2 research.

Adios Lena. We had no success with hiring for a junior student mapping position, so we have advertised again, closing 26 October, 2007.

I will be attending the National Portraiture meeting at the CIRIEC Conference in Victoria in October in order to keep BALTA abreast of national issues in mapping.

Contact for information:

Mike Gismond
mikeg@athabascau.ca

NEW MEMBERS JOIN STEERING COMMITTEE

There have been several transitions during 2007 in membership of the BALTA steering committee and in co-chairs of the three SERCs (Social Economy Research Clusters).

Darcy Mitchell has retired from her position as Director of the Centre for Non-Timber Resources at Royal Roads University and has also stepped down from her positions on the BALTA steering committee and as co-chair of SERC 2. We thank Darcy for her contributions to getting BALTA established.

Two new members have joined the steering committee, both from Alberta. Martin Garber-Conrad is CEO of the Edmonton Community Foundation (see

page 4 story) and Mary Beckie is an assistant professor with the Faculty of Extension at the University of Alberta.

SERC 1 has a new co-chair, George Penfold, Regional Innovation Chair in Rural Economic Development at Selkirk College, replacing Martin Garber-Conrad. SERC 3 has two new co-chairs, David LePage of Enterprising Non-Profits and Jorge Sousa, an assistant professor in Educational Policy Studies at the University of Alberta. They replace Mike Lewis and Veronica Vinge. Continuing in their co-chair roles are John Restakis of the BC Co-operative Association for SERC 1 and Mark Roseland of Simon Fraser University for SERC 2.

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researching significant questions important to practitioners, policy makers and researchers working in CED, social enterprise, community development finance and the co-operative movement.

And what great students we are attracting to work on BALTA projects. I am so impressed with their strong values, desire to be strategic, capacity to think and their interest in making a contribution. In my role as lead investigator I am inspired by this growing cadre of folks, many of whom are bringing a reservoir of experience in making things happen - definitely an opportunity for me to learn as much as lead.

I must confess that many times during the development period I thought I must have lost my marbles to get involved in this project. Presumptuously, I thought the Centre for Community Enterprise and the Canadian Centre for Community Renewal, practitioner organizations, could leverage more for the field than a university could in the lead role. Time will tell. But have I ever learned how important the committed people from the academy are to making this whole initiative really work. If Stuart Wulff and the more experienced academics had not been there to guide the process at times, we may well not have made it, at least with me in the lead.

But now we are entering a new phase and it will be a lot more fun - doing the research, mentoring fine students, learning, analyzing and framing new questions. An important part of this next phase will be expanding the outreach to other practitioners and researchers and the broader public with an invitation to contribute. Welcome aboard our first newsletter and please pass it around as far and wide as you can.

NEW BALTA MEMBERS IN 2007

We welcome several new members who have joined the BALTA Research Alliance in 2007:

Herb Barbolet
Anna Bubel
Dr. Peter Hall
Dr. Noel Keough
Dr. Karsten Mundel
George Penfold
Dr. Evelyn Pinkerton
Dr. Jorge Sousa

Simon Fraser University
Another Way
Simon Fraser University
University of Calgary
University of Alberta
Selkirk College
Simon Fraser University
University of Alberta

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sights and connections.

A final report was written and is available through BALTA. The research was presented at the Canadian Social Sciences and Humanities Conference in Saskatoon in May 2007 and will be presented at the first International CIRIEC Conference on the Social Economy in Victoria, BC at the end of October.

A second phase of research is currently being developed to determine how lessons from the Nova Scotia experience might be applicable in the BC context.

Funding for development of this research was received from the Rural Secretariat of the Government of Canada.

For more information on the Nova Scotia case study, contact **Lena Soots at: lsoots@sfu.ca**

For more information on the Phase 2 research contact **Mike Lewis at: ccelewis@island.net**

The case study review will be available on the BALTA website by early November:

<http://www.socialeconomy-bcalberta.ca>

BALTA LAUNCHES SOCIAL ECONOMY READER

As one of its early initiatives, BALTA has developed an online *North American Reader in Community Economic Development (CED) and the Social Economy*. This e-book has been developed and published as a collaboration between the Canadian Centre for Community Renewal (CCCR), the Centre for Community Enterprise (CCE) and Athabasca University.

Sharing key readings relevant to BALTA's central research questions was viewed as an efficient way of building a common language and understanding of the social economy. While an immediate goal of the

Reader is to provide a resource to those associated with BALTA, this reader should be of broad relevance to anyone with an interest in CED and the social economy. It represents a unique resource for English readers whether students, practitioners, researchers, teachers or policy makers, wherever they might be working in North America.

The Reader was edited by Mike Lewis, Lead Investigator and Director of BALTA and draws on the extensive collection held by CCCR and CCE. Many of the readings were first published in Canada's premier community economic development magazine,

Making Waves. BALTA co-investigator, Mike Gismondi, and other personnel at Athabasca University turned the draft book into an online reader hosted by AU.

Funding for development of the Reader was received from the Rural Secretariat of the Government of Canada.

To visit the BALTA Social Economy Reader, visit:

(<http://library.athabascau.ca/drr/view.php?course=sshrc&id=641>)

BALTA'S FIRST INTERNATIONAL OUTING

by Mike Lewis

In the sweltering June heat of Atlanta, Georgia, BALTA co-sponsored with the North American Network on the Solidarity Economy a strategically important workshop on the social economy in Canada.

Organized within the economic alternatives section of the first ever U.S. Social Forum, key organizations and networks from across the U.S. engaged with Mike Lewis and Nancy Neamtan, President of the Chantier l'économie sociale in Quebec, both of

whom are associated with BALTA. They shared the panel with Nedda Angulo, a key leader of the national solidarity economy network in Peru (GRESPE). Ethel Coté moderated this workshop, officially representing the Canadian CED Network, another partner in BALTA.

Mike used some of the early work he did on one of BALTA's research projects as the basis for his presentations in two different workshops.

These three Canadians, along with Dan Swinney, a BALTA collaborator

from Chicago, and Yvon Poirier from Quebec, were active in giving leadership in other workshops as well.

15,000 people attended the four day U.S. Social Forum. From the perspective of those working on the social and solidarity economy stream of the Forum, one very important result was the birth of a U.S. national network on the solidarity economy. Emily Kawano, Executive Director of the National Centre for Popular Economics, spoke for many participants in publicly thanking the Canadians for their contribution.

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<http://www.socialeconomy-bcalberta.ca>

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Stuart Wulff, BALTA Coordinator

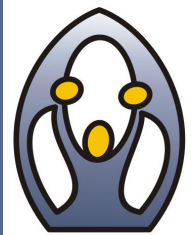
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BALTA

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