

BALTA BITS & BITES

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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.



One of the cornerstones of the BALTA research strategy is to map the social economy in B.C. and Alberta. Why bother, some might ask. There are three very good reasons, reasons that I think are important enough for each of us to make it part of the work we share within BALTA.

1. If we do not know the size and scope of what already exists, it limits the capacity of practitioners, activists and researchers to educate policy makers about the social economy's importance.
2. Many organizations we include in the social economy do not currently see themselves as part of it. Many have never even heard the term. Mapping can be a tool for forging a common identity, without which our influence is muted. Mapping can thus be an awareness building and organizing tool.

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BALTA Co-Sponsored Event Closes International Research Conference

By: Stuart Wulff

Over 50 people gathered in Victoria, BC, on the evening of October 25 for **Where Community Counts: A Forum on Community Economic Development and the Social Economy in the Global Context**. The event capped an eventful week for social economy researchers, the First International CIRIEC Research Conference on the Social Economy.

BALTA co-sponsored the free public forum, along with the Canadian CED Network, the Canadian Social Economy Hub and the Victoria Community



BALTA's Oct 7 evening event at the CIRIEC Conference

Council. BALTA was also a significant presence at the CIRIEC conference, with several BALTA members
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SOCIAL ECONOMY SURVEY LAUNCH

The **BALTA Social Economy Survey will be launched January 7, 2008**. Part of BALTA's research is to identify the many types of 'social economy' organizations that contribute to the social and/or environmental well being of people and communities in BC and Alberta.

With the data gathered through this survey, BALTA will be able to provide evidence of the social, environmental, financial and job creation contributions of organizations like yours. This information will allow both community development workers and public policy actors and activists to promote the sector in western Canada, build up support networks regionally and nationally, and effectively lobby all levels

of government.

If you are the President or Chair of a Society or Social Economy Organization, or the member that typically fills in research surveys for the group, researchers will be contacting you to invite your participation in this survey.

Alternatively you can go online and fill out the survey. Only one person per organization should do this. You will need your organization's latest year-end financial report to answer a few of the questions. The survey should take approximately 10-15 minutes to complete. The online link to the survey can be found at: <http://www.socialeconomy-bcalberta.ca/mapping.html>

BALTA
B.C.-Alberta Social Economy Research Alliance



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PROFILING AND INVENTORING THE SOCIAL ECONOMY IN ALBERTA AND BC

By Dr. Jorge Sousa

BALTA Projects:

C4 - Preliminary Profile of the Size and Scope of the Social Economy in Alberta and BC

C9 – CED and Social Economy Policy Inventory in BC and Alberta (Phase One)

Projects C4 and C9 are foundational projects intended to be used as a starting point for subsequent BALTA projects. Each of the projects has involved consultation and direction from knowledgeable individuals in each of the BALTA Social Economy Research Clusters (SERCs) and has included introducing graduate students to the concept of the social economy. In these studies the social economy is operationalized as encompassing the range of ways people exchange goods and services (often based on the principle of reciprocity) with each other and distribute profit as surpluses through various mechanisms, including: the family or household economy; local volunteer activities and opportunities; and the wide range of more formally structured organizations (such as charities or member based associations) that explicitly pursue social goals using business oriented approaches.

C4 – Preliminary Profile of the Social Economy

The purpose of this project is to identify the size and scope of the social economy in Alberta and British Columbia. The primary objective is to develop a preliminary profile of the social economy, using existing data, to be used immediately by CED and social economy networks in Alberta and BC. Our understanding of the presence and significance of the social economy in Alberta and

BC has largely been based on anecdotal accounts, government reports and non-government research and reports. This study went directly to second tier organizations and knowledgeable figures for the purpose of consolidating existing information.



Dr. Jorge Sousa

An exciting outcome of this project has been the recognition of the extent to which the social economy is present in all sectors of society and the economy. The range of presence ranges from social enterprises to social services. In the resulting report, I build on conceptualizations and categories found in a variety of areas, including the recently completed profile of the voluntary sector by Imagine Canada, efforts by Quebec researchers to classify the types of organizations that make up the social economy, and the BALTA mapping project.

C9 – CED and Social Economy Policy Inventory in B.C. and Alberta (Phase One)

The purpose of this project is to design a classification framework to guide the planning and analysis of a policy inventory of federal and provincial legislation, policies, programs and initiatives in BC and Alberta that are directly relevant to CED and the social economy. An initial scan of planning documents and legislation reveals a primary focus on economic growth and economic development outcomes.

An interesting finding is the work of foundations that have a social orientation, with particular focus on forms of economic development. An excellent example is the Muttart Foundation in Alberta. The language reflects a focus on “business” “growth” and “development.” There are a variety of areas that are of particular interest to these foundations that may serve an intermediary function, such as community services, the health sector, rural economic development and voluntary organizations. These areas are deemed to fill a space in response to the “restructuring” and current social implications in Alberta (specifically housing, healthcare, immigration services) resulting from rapid economic growth.

The outcome of this research will be a basis for gap analysis in the BC and Alberta contexts, as well as a basis for further BALTA projects and comparative research with social economy research networks in other regions on Canada. The findings from this project can be used to strategically target future policy development efforts.

For further information about either project, contact: sousa@ualberta.ca

BALTA STUDENTS PROFILED

JULIA AFFOLDERBACH

Julia is BALTA's Senior Mapping Researcher working on development, design and administration of Phase 1 and 2 of the mapping research. She is from Germany and came to Vancouver to join the PhD program in economic geography at Simon Fraser University. She is studying the role of environmental organizations in the forest sector based on case studies from BC and Tasmania.

Her broader research interests revolve around economic restructuring and sustainability, environment-economy relations and the role of NGOs, as well as spatial implications and the importance of place. Julia has worked as research assistant and collaborator for various research projects and has taught classes in resource planning and economic geography. She holds a MA in geography from the University of Cologne.



WENDY AUPERS



Wendy is working on a BALTA project looking at Understanding the Role of the Social Economy in Advancing Rural Revitalization and Development. Wendy is an award-winning environmental educator and communicator with 20 years of experience in working with various levels of government, non-profit groups and businesses. She currently works for the Alberta Ministry of Sustainable Resource Development. Wendy has an Honours Bachelor of Outdoor Recreation from Lake-

head University and is completing her Master's in Sustainable Communities and Community Development through Athabasca University. Wendy lives in Black Diamond, a small town in rural Alberta, with her partner, Rob, where they spend time hiking and fishing with their dogs Jake (the hero lab!) and Atlas (a Karelian bear dog).



BILLY COLLINS

William (Billy) is working on a BALTA project looking at Understanding the Role of the Social Economy in Advancing Rural Revitalization and Development alongside Wendy Aupers. He is a student in the Master of Urban Studies program at Simon Fraser University, where he pursues his passion for parks, adventure tourism, alpine environments and sustainable transportation. Outfitted with a rather idiosyncratic

resume – he spent 15 years in the Canadian music industry and has 3 undergraduate degrees in completely unrelated fields – Billy currently spends most of his time trying to figure out how to combine all of his passions into a future career. As such, this academic year will see Billy begin to work on his thesis, which endeavors to explore the possibilities of a light-rail solution to social, environmental and transportation issues in the Bow Valley corridor between the mountain towns of Canmore and Banff.



BALTA STUDENTS (CONT'D)



KAREN HEISLER

Karen is working as the Evaluation Assistant Coordinator with BALTA, responsible for evaluating the effectiveness of BALTA and the impact of its research programs. She is from Alberta and is studying in the PhD program at Simon Fraser University. Before returning to school Karen worked in community economic development for the past five years in southern Alberta. The

majority of Karen's work has been in program development and project management in business retention and investment attraction on the community and regional level. She holds a MSc in Rural Planning and Development, where her research focused on evaluation of youth entrepreneurship programs in community economic development.

WILLIAM KENDALL

William is working on a SERC 3 (Analysis, Evaluation & Infrastructure) project looking at Credit Unions as a Financing Source for the Social Economy. He is from British Columbia and is studying in the Master's of Public Policy program at Simon Fraser University. Before working for BALTA, William spent the summer with the BC Ministry of Finance, Financial and Corporate Sector Policy Branch. The majority of William's work has been

concerned with consumer protection, solvency regulation and improving local market conditions for community enterprises. He holds a BA in English Literature and Political Science from the University of British Columbia. In addition to BALTA, William's research is currently focused on the locking-in of private pension benefits in Canada.



NADINE PINELL

Nadine is working on a BALTA project to explore options for a golden mussel social economy enterprise with BC Coastal First Nations. She is currently a Master's candidate in the Resource and Environmental Management program at Simon Fraser University.

Originally from Alberta, Nadine has a B.Sc. (Hons) from the University of British Columbia in Ecology and Environmental Biol-



ogy. She has coordinated programs and outreach for a community-based marine conservation project at the Vancouver Aquarium, managed ecological research and environmental education projects at the Douglas College Institute of Urban Ecology, and worked on a variety of field ecology projects in BC, Alaska, and the Yukon. Most recently, she worked with the United Nations Development Programme in Namibia on sustainable development project development and planning.

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presenting papers.

Speakers at the forum included BALTA members Nancy Neamtan, President/Executive Director of the Chantier de l'économie sociale in Quebec, and Mike Lewis. Other speakers were Olga Navarro-Flores of the Université du Québec à Montréal, and Rupert Downing and Carol Madsen of the Canadian CED Network. A lively discussion with audience members closed out the evening.

The conference drew approximately 300 participants to hear a very diverse range of papers presented on topics related to the social economy and civil society. The conference was co-sponsored by CIRIEC (Centre International de Recherches et d'Information sur l'Economie Publique, Sociale et Coopérative), CIRIEC Canada and the Canadian Social Economy Hub.

BALTA members and students presenting at the conference included:

- Jean-Marc Fontan – “Recherche partenariale en contexte Québécois”
- Mike Lewis – “Getting Outside the Social Economy Box: Towards a Solidarity Economy”

- Ian MacPherson – “Walking the Walk: the Challenges Confronting the Social Economy in Canada”
- Sean Markey, Mark Roseland & Peter Hall – “Community reinvestment and the challenges of scaling up the social economy”
- Margie Mendell – “Democratizing Finance: Financial Innovation in the Social Economy: The Emergence of a New Financial Market”
- Nancy Neamtan – “Economie sociale face à la globalisation”
- Lena Soots – “Supporting Innovative Co-operative Development in Canada: The Case of the Nova Scotia Co-operative Development System”
- Jorge Sousa – “Service Learning in the Social Economy”

Seven BALTA student research assistants (Julia Affolderbach, Wendy Aupers, Billy Collins, Zane Hamm, Karen Heisler, Nadine Pinnell, Lena Soots) participated in all or part of the conference. The conference week also provided an opportunity for BALTA members and students to get better acquainted and to discuss several areas of BALTA's research program.

For conference information: http://conference.se-es.ca/?page_id=11

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3. Lastly, all of us humans are in the same boat – we don't know what we don't know – and what we do not know cannot influence our learning. We expect that the mapping program is going to facilitate the learning of practitioners, researchers and policy makers alike

A lot of work has been done thus far. The first phase mapping questionnaire is being tested as I write this and will be implemented over the next few months. It is short and basic, but will yield critical information.

Once the first phase is done, BALTA will evaluate the results with practitioners, researchers and policy makers. I expect that we will discover gaps in coverage. The expectation is that once the usefulness of the initial results are demonstrated, we can broaden cooperation to give it a second go.

We need your help to maximize coverage in Phase One, so please keep sending in your ideas for networks to tap and even individual social enterprises or development organizations in B.C. and Alberta to map.

This first phase of work will feed into a subsequent phase of more intensive probing of sub-sets of the data. As the overall research program advances, the data gathered will both inform existing and new research and it will raise new questions. I expect that more specialized surveys may be necessary to understand particular sectors that are relevant to BALTA's priorities.

The mapping program will continue as a core activity throughout the life of BALTA, which currently runs until March 2011.

Best wishes for 2008. I look forward to seeing many of you in the first four months of the new year.



**Best Wishes
for the New
Year
from
BALTA.**



DEMONSTRATING VALUE PROJECT

Social enterprises across Canada have long indicated a desire to explore how to assess and demonstrate the impact of their work, both within their own organizations and across the sector. Demonstrating value will give organizations the evidence they need to improve their overall performance, to attract investment and to influence policy development. Investors share this desire for similar reasons, with the added advantage that data collected could be used to help inform future investments. Over recent years, both groups have come together to develop a common framework for performance and impact assessment through the Demonstrating Value Project.

This project is using a collaborative approach to develop a framework by engaging social enterprise investors and operators together in its development and piloting. The framework will build on, adapt and integrate existing methods and tools to assist a social enterprise and their stakeholders to assess and communicate their financial performance, organizational sustainability and mission-related impacts.

The project is a starting point for moving towards improved practices and seeks to be a foundation for future development. Exploratory work around the need and design for a project began in BC in 2004. Framework devel-

opment began in full in November 2006. The project is coordinated by VanCity Credit Union, with financial and technical support from the following organizations: Business Objects, Coast Capital Savings, Community Economic Development Technical Assistance Program (CEDTAP), Enterprising Non-Profits (ENP), Human Resources and Social Development Canada (HRSDC) and Renewal Partners.

For more detailed information, please visit:

www.enterprisingnonprofits.ca/social_impact_assess
or contact **Bryn Sadownik at (604) 877-7646** or Bryn_Sadownik@vancity.com

FORMER PM MARTIN SUPPORTS TAX INCENTIVES FOR SOCIAL ENTERPRISES

Former Prime Minister Paul Martin believes that Canada's tax system needs to be changed to encourage investors to pump money into social enterprises, according to an article by Bruce Campion-Smith in the November 8, 2007, *Toronto Star*.

Martin spoke to an audience at the Munk Centre for International Studies in Toronto that day telling them that Canada has "barely scratched" the potential of the charitable sector to help Canadian society – and its economy – and outdated tax laws are partly to blame.

"There are many investors who would put their money into social enterprise,

if the vehicles and incentives were there," Martin said.

Martin believes that tax incentives will make it possible for social entrepreneurs to tap capital markets the same way their business counterparts do.

The work of charities and non-profits make Canada a much richer society morally and economically and contribute 8 per cent of the country's gross domestic product, according to Martin. He noted that Britain already provides "community interest companies" tax incentives for firms that have community benefits "rather than purely private gain". 1,200 such businesses have been created in two

years.

Martin acknowledged that, while he took some steps on the issue when he was finance minister and prime minister, he didn't go far enough.

BALTA'S ACADEMIC CO-ORDINATOR

Sara-Jane Brocklehurst is currently the academic co-ordinator for BALTA.

She can be reached at sjbjoat@shaw.ca or 1-250-247-7390

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

To contact BALTA:
Stuart Wulff, BALTA Coordinator
swulff@uniserve.com
Tel: 250-723-2296

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Sara-Jane Brocklehurst,
Academic Coordinator



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