

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.

Dr. Jorge Sousa, a "new scholar", finished his PhD at the University of Toronto 2 years ago and is now teaching and conducting research through the University of Alberta (UofA). He is very active in BALTA, leading two research projects and co-chairing one of the three research clusters.

A few weeks ago he interjected in the middle of a meeting that he was finding BALTA very stimulating but challenging. I could relate to such sentiments. It certainly has been challenging for me: I have done a lot of research in my time but doing it in conjunction with researchers and students, ensconced in academia, is a new ball game.

Curious, I probed Jorge: "What do you mean?"

"Well, having to deal with practitioners in shaping the research

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BALTA STUDENT FORUM: A SUCCESSFUL ENDEAVOUR

By Sara-Jane Brocklehurst

On February 8th, 2008, nine student research assistants, working on BALTA projects, met in Vancouver for a two day event. The main objective of this first student forum was to ensure that students have a sense of function and role in the bigger picture of BALTA.

BALTA is just completing its first year of research projects. This forum gave the students the opportunity to provide BALTA staff and supervisors with their perspective of what was working and what was not working in the research and administrative processes.

Students present at the forum included: Lena Soots, Julia Affolderbach, Nadine Pinnell, Emma Sharkey, Heather Lynch, Erin Swift, Karen Heisler, and Zane Hamm. Sara-Jane Brocklehurst, academic co-ordinator, and Mike Lewis, lead investigator, were there from the BALTA management perspective and Mike Gismondi, Jorge Sousa and Mark Roseland represented supervisor and lead researcher roles.

For the most part the students that attended the forum were pleased with the opportunity to discuss their ex-

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BALTA ALBERTA MEMBERS MEET

By Stuart Wulff

In January, Alberta members of BALTA came together for a half day meeting in Edmonton. They were joined by several BC members and several of BALTA's student research assistants.

The meeting provided an opportunity to update members on various aspects of BALTA's research program and to discuss upcoming activities. A highlight of the meeting was a panel presentation on various aspects of the social economy in Alberta by three Alberta based social economy practi-

tioners:

- Anna Bubel – BALTA member and a consultant on various social economy and CED areas
- Rebekah Seidel – Coordinator of the Alberta CED Network Co-op
- Bob Ward – Manager of the new Edmonton Social Enterprise Fund

The informative presentations generated lively discussion and have already led to a SERC 2 decision to focus a case study on the Rimbey Farmers' Market.

BALTA
B.C.-Alberta Social Economy Research Alliance



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BALTA STUDENTS PROFILED

ZANE HAMM

Zane is a senior student researcher with Phase 1 of the BALTA project CED and Social Economy Policy Inventory in BC and Alberta (SERC 3). She is at the University of Alberta in the PhD program in Education Policy Studies, with a specialization in Adult Education. Her research is exploring rural out-migration, enhancing rural community health through education policy, and community development.

Zane's work experience includes the Multicultural Health Brokers Co-operative in Edmonton, six years with the Augustana/University of Alberta Rural Development Exchange, Canada World Youth international education programs, and various global and environmental education projects.

Zane grew up on a farm in Saskatchewan and is committed to community supported agriculture and food systems, and growing/sharing food. She holds an M. Ed in International Education.



HEATHER LYNCH



Heather is working as a junior researcher with BALTA, in its en-

deavor to effectively 'map' the social economy. Originally from Montreal, she relocated to Vancouver, BC to pursue a Master's of Public Policy at Simon Fraser University. Prior to doing so, she worked for nearly three and a half years at a magazine entitled, 'Pulp & Paper Canada,' as an editor.

She holds an undergraduate degree in Journalism from Concordia University and has a wide range of volunteer experience on

several boards of directors for HIV/AIDS and violence against women-related organizations.

While she is in the early stages of her degree, her area of research interest lies in social policy, primarily in issues surrounding eldercare and the implications of the sandwich generation.

EMMA SHARKEY

Emma is currently earning a Master's in Dispute Resolution at the University of Victoria. Her work with BALTA includes a project led by Mike Gismondi which looks at municipal policies supportive of Community Economic Development and the Social Economy in BC and Alberta (SERC 3).

Emma's areas of research interest include the social economy,

sustainable communities, community building, intergovernmental relations, public policy, dispute resolution, and Canadian political disputes. Emma received a BA with Honors in Political Science from Carleton University.



Her professional background includes promoting sustainable community development within local and regional governments in BC, researching alleged treaty violations between Canada and First Nations, conducting a cross-sectoral consultation with BC water users around climate change challenges, and raising awareness of issues surrounding fair trade and food security.

BALTA STUDENTS (CONT'D)

EVA BOGDAN

Eva is a student research assistant completing a case study of the Rimbey farmers' market in order to understand the role of the social economy in promoting rural revitalization and development (SERC 2). Her main interests are sustainable agriculture and the role food plays in mediating environmental and human health.

She has worked on organic farms, including selling at the farmer's

market. She is currently completing her Master's of Science in Rural Sociology and has a BSc In Environmental and Conservation Sciences from the University of Alberta.



ERIN SWIFT

Erin Swift is currently working towards a Master's of Architecture from the Faculty of Environmental Design at the University of Calgary. She is a passionate student with a keen interest in phenomenology, environmental design, issues of place and sustainability, as well as international development.

In 2006 Erin received a BA in Urban Studies with Great Distinction from the University of Calgary. Her professional experience includes creative and challenging work in a large architectural firm and doing research in association with the Calgary Regional Partnership. Erin has also volunteered extensively with Habitat for Humanity, including a 3 month volunteer term constructing houses in the Dominican Republic. Erin is an avid world traveler and hopes to pursue a career that allows her to explore and design in a plethora of contexts.

Erin's work with BALTA is as a Graduate Student Researcher. Her first piece, under the supervision of Mike Gismondi, focuses on heritage architecture and the social economy (SERC 3). The project examines the potentials and synergies for locating social enterprises in a meaningful, and sustainable manner through the conservation and adaptive reuse of heritage buildings.



REBECCA PEARSON

Rebecca is working on two BALTA projects within SERC 1: Innovative Uses of Co-operative Housing Assets, and some preliminary work on The Social Purpose Capital Market in BC and Alberta. She is from San Francisco, California, and is studying Sustainability & Business in the MBA pro-



gram at the University of British Columbia.

Before moving to Vancouver, Rebecca worked in socially responsible investment, green building, sustainable transportation and public policy. She holds a BA in Sustainable Development from UC Berkeley.

ONDREJ FILIP

Ondrej is a research assistant with a BC Co-operative Association led BALTA project looking at the barriers and opportunities for development of



social care co-operatives in British Columbia (SERC 1).

Ondrej is a 4th year Economics student at Simon Fraser University and is also pursuing a diploma in Sustainable Community Development. His areas of interest are sustainability, renewable energy and social economy. With only two semesters left in his degree, Ondrej is looking forward to start a co-op enterprise after graduation.

SERC UPDATES

SERC 1

SERC 1, whose mandate focuses on Social Enterprises in Human Services and Housing, met for a day in Edmonton in January. SERC members received an update on 2007-2008 research projects and began planning for 2008-2009 projects. Two SERC 1 projects have been active to date:

- A1 – Innovative Use of Housing Co-op Assets
- A2 – Co-op Models of Social Care

A1, under the leadership of Carol Murray and with student researcher Rebecca Pearson, is nearing completion and will likely lead to a second phase of research. A2, under the leadership of John Restakis, has experienced some delays and is continuing with a new student research assistant, Ondrej Filip.

Project A3 – The Social Purpose Capital Market in BC and Alberta – is just getting under way, led by Jenny Kain and Martin Garber-Conrad and employing student researcher Rebecca Pearson to do some preliminary work. Another student will be hired to continue the work beyond April.

Project A4 – Role of Faith Based Organizations in the Social Economy – has been deferred to sometime later in 2008.

Priorities for research in 2008-2009 have been preliminarily identified as:

- Continuation of the research featured in Projects A1, A2, A3 and A4, with initiation of a second phase of research building on A1;
- Role of co-ops in health care;
- Role of organized labour vis a vis the social economy;
- Research and theoretical work regarding the relationship between capital and the social market.

SERC 2

SERC 2, whose mandate focuses on The Social Economy in Rural Revitalization and Development, has been having regular monthly meetings since October 2007. The group had the opportunity to meet in person in Edmonton in January to further investigate and discuss project opportunities for 2008—2009. Two SERC 2 projects have been active to-date:

- B1—Understanding the Role of the Social Economy in Advancing Rural Revitalization and Development
- B2—Sustainability and the Social Economy

B1 co-led by Mary Beckie and Sean Markey, wrapped up work to date in December 31, 2007 and are regrouping to determine the best way to proceed with the rest of the project intent. In the meantime, student Eva Bogdan, is doing a case study on the Rimbey farmers' market. Through scoping studies, they have been focusing on overall community development with emphasis on specific resource sectors:

- o Shellfish/aquaculture
- o Non-timber forest products
- o Ecotourism (dropped)
- o Alternative energy production for local sustainability market
- Organic agriculture (and local food systems)

B2, led by Mike Gismondi is focusing on the intersection and overlap of the social economy and sustainability. Mike and research assistant, Lena Soots, are in the process of preparing a presentation of a paper for two conferences (one sustainability focused and one social economy focused).

The top four priorities for research in 2008—2009 include:

- Community Renewable Energy
- Food Systems
- Land Trusts/Land Tenure
- Forestry/NTFP

SERC 3

SERC 3, whose mandate focuses on Analysis, Evaluation and Infrastructure, has been meeting on a regular basis (October, November, February, March) by tele-conference. Several projects have been completed in 2007-2008 or are nearing completion:

C4 – Preliminary Profile of the Social Economy in Alberta and BC – Led by Jorge Sousa and employing student researcher Evelyn Hamdon, the research is done and the report is nearing completion.

C5 & C6 – Two Phases of “From Social Economy to Solidarity Economy” – Led by Mike Lewis, the projects are completed. Papers have been presented at conferences in Canada and the U.S. and are being published in both countries, Germany and Japan.

C11 – Credit Unions as a Financing Source for the Social Economy – Led by Stewart Perry and employing student researcher William Kendall, this initial phase consisted of preliminary research and scoping for a subsequent phase of case studies. The project is completed and work has begun on development of a proposal for second phase research.

Other projects have begun and will continue into the 2008-2009 research year:

C9 – CED and Social Economy Policy Inventory in BC and Alberta – Led by Jorge Sousa and employing student researcher Zane Hamm, preliminary work has focused on development of a policy classification framework.

C10 – Municipal Support of the Social Economy – Led by Mike Gismondi and Jenny Kain and employing student researcher Emma Sharkey, this project is in its early stages.

SERC 3 has also begun planning for new projects to take place during 2008-2009.

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periences, issues and challenges as research assistants in BALTA projects. Based on their evaluations, they found great value in being able to meet other students and develop a more connected feeling to the larger BALTA function.

As BALTA has continued to grow and mature, challenges of meaningfully orientating and connecting research assistants, who may only be on a project for a couple of months, versus students who have been involved for over a year, have been present. Added to the challenge of different employment time frames has been the fact that students are spread out between two provinces and often do not get to connect with other students or supervisors.

One intent of this forum was to provide an arena to discuss how to make the research assistant experience as optimal as possible. BALTA staff and supervisors were able to receive feedback from the students regarding those elements that they have had to struggle with during these early growing pains. Based on the student feedback, it was felt that the forum successfully provided this arena and contact with staff, supervisors and other students proved invaluable.

The student research assistants made a number of key recommendations on how to improve their role, function and overall experience, including:

- Provide a clearer definition of roles and responsibilities for the research assistant and the supervisor.
- Maximize opportunities for students to meet face-to-face as much as possible.
- Students should have representation on the BALTA Steering Committee.
- A student database will be provided to all students so that they may proactively contact each other as they see fit.
- Sara-Jane will develop an orientation handbook to be provided to each new student to better assist them in their role as research assistant with BALTA.

Overall, the forum was considered a success and well worth its time. BALTA staff and supervisors found the experience equally valuable as it gave them the opportunity to understand the student perspective.

Students with any questions can contact Sara-Jane, the Academic Co-ordinator, at [sjboat@shaw.ca](mailto:sbjcoat@shaw.ca)



Mike Gismondi, a lead researcher, and students Julia Affolderbach and Lena Soots gather at the CIRIEC conference back in October 2007

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agenda and building the framework for analysis adds a whole new dimension" he replied.

Still not sure if he was experiencing this "new dimension" as positive or negative I asked, "So is this good?", half wondering if he might say he was finding it to be a waste of energy. I was perhaps concerned in case it reflected my work on one project I was doing with Jorge and Zane Hamm, a UofA doctoral student working with BALTA on a framework for analyzing policy. I thought maybe he was getting fed up with my critiques and input.

However, I need not have worried. Jorge, like I, was finding the engagement between practitioners and researchers challenging but worthwhile, a learning process rich with tensions that have the potential for feeding creativity and new knowledge creation.

When the Canadian Centre for Community Renewal decided to see if we might secure the lead role in this SSHRC Social Economy suite, it was with one goal – to strengthen the foundations for reinserting social and environmental goals into the heart of our economic life. Creating a platform that would align university researchers to the questions emanating from the practitioner trenches was, I thought, one piece of work that would contribute to growing the social economy, over time.

The jury is still out on whether this goal will be met. Time will tell. What is clear is that the process of constructing the platform is generating real learning, new relationships and what one might call a 'cross-cultural' dialogue that is both challenging and full of promise.

STUART WULFF

Stuart has worked for over 20 years as coordinator and CEO



for a wide range of education, policy and advocacy oriented coalitions, mostly in the fields of international development and human rights. His work has also focused on environmental issues (e.g. climate change), conflict resolution, and community based economic and social development.

Stuart's work has taken him to many countries, including periods living in Africa, Europe and the South Pacific. An important aspect of Stuart's work has been the building of links between organizations and communities in other countries and their counterparts in Canada, including with First Nations and Indigenous Peoples' organizations. Stuart served for nine years as editor of Tok Blong Pasifik, an international magazine on Pacific issues with subscribers in over 40 countries, and was associate producer for P.O. Box Africa, a television series on community development set in Southern and Eastern Africa.

SARA-JANE BROCKLEHURST

Sara-Jane graduated with a degree in Biology from Queen's University in 1990. She has augmented her education continually adding journalism, horticulture, and personal training to the list. Since moving to BC in 1996, she has been self-employed offering services in research, strategic and community economic development planning, facilitation, program and process coordination, and instruction. Sara-Jane recently was, as an administrative coordinator, managing the Science and Technology and Education portfolios at the Centre for Continuing Studies at Malaspina University-College.

Sara-Jane has worked extensively with First Nations, government, non-government organizations and the private sector. She is pas-

Academic Co-ordinator



sionate about the environment and keeps herself busy building an alternative natural hybrid home of straw bale, clay infill and cob.

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

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