2008/09 Research Projects Approved

BALTA was developed as a platform through which academic researchers, practitioners and their representative organizations could build the relationships and trust necessary to establish a research agenda relevant to expanding and strengthening the growth of the social economy, in the region and across Canada.

While individual researchers lead specific research projects, the priorities for BALTA’s research and annual research workplans are developed and approved by Social Economy Research Clusters (SERCs) that bring together both academic researchers and community based social economy practitioners.

On May 29 and 30th, 2008, the BALTA Steering Committee gathered for its annual workplan approval process. Each SERC put forward workplans inclusive of project proposals that each group had carefully developed and ratified prior to bringing them forward to the Committee.

A variety of exciting projects have been proposed and approved for the coming 2008/09 year. Despite the set amount of money available for research, the SERCs and the Steering Committee worked hard to ensure projects could be realized.

BALTA continues to work hard to realize its main goal of researching various aspects of the social economy with a view to both increasing knowledge and identifying ways to strengthen and expand the sector.

BALTA will hold its first symposium in Vancouver on November 13-14 (Thursday-Friday), 2008. While BALTA has held several planning forums to date, this will be the first event focused on the initial results of BALTA’s research program. Another section of the symposium will focus on how to strengthen dissemination of BALTA’s research results to a wider audience.

All BALTA members are encouraged to attend. Please reserve those dates.

The symposium has been scheduled in proximity to the first BC Summit on Social Enterprise (November 17-19) to facilitate the participation of relevant BALTA members in both events. BALTA is a co-host of the Summit.

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Evaluating the BALTA Model and Experience

by Stuart Wulff *

When the idea of developing the BC-Alberta Social Economy Research Alliance (BALTA) was first being entertained, a primary goal was to create a platform through which academic researchers, practitioners and their representative organizations could build the relationships and trust necessary to establish a research agenda relevant to expanding and strengthening the social economy.

A little over two years into BALTA’s existence, it is possible to begin, at least provisionally, to consider how well BALTA is doing in meeting this goal and the various objectives set for BALTA’s five year SSHRC** funded program. Early in BALTA’s development, a commitment was made to implement a rigorous and multi-faceted approach to the evaluation of the model and research program.

Karen Heisler, a doctoral student at Simon Fraser University, was hired as the assistant evaluation coordinator. One of her early projects was to conduct interviews in November-December of 2007 with most BALTA members to explore their perspectives on BALTA’s development to that point. Then, in February 2008, Karen conducted an evaluation focus group session with students who had been working on BALTA projects. She also reviewed the results of written evaluations collected at several BALTA meetings.

Karen has synthesized all of these early reflections on BALTA’s functioning into a report. It summarizes the evaluation feedback to date, assesses BALTA’s progress and identifies issues for further reflection. The report was reviewed by BALTA’s Steering Committee in late May and is now being circulated to the BALTA membership. The report and BALTA’s Mid-Term Report for SSHRC (see below) will be discussed by BALTA’s Advisory Council, which will make recommendations for how to address the challenges identified.

In the words of BALTA’s lead investigator, Mike Lewis, the evaluation shows that BALTA’s results to date are “messy, full of learning” and show “a work in progress”. While documenting the bumps along our early road, the report shows that we are making progress and that we are learning from our mistakes and strengthening our approach to research planning and implementation.

This evaluation exercise was specifically aimed towards our own learning and as a vehicle for identifying and addressing specific challenges with our work to date.

The next major step in BALTA’s evaluation is just beginning and will have an external audience. This summer SSHRC is conducting its Mid-Term Review of all the social economy research networks it is funding, including BALTA. This review will lead to a SSHRC decision on continued funding for BALTA and the other research networks.

Karen has recently circulated a survey to BALTA members, following up on the earlier interviews. Other data about BALTA’s functioning and research results to date is being gathered and analyzed. An evaluation teleconference with SSHRC will take place in mid-July and the final Mid-Term Report will be submitted at the beginning of September.

BALTA’s approach to evaluation is already allowing us to learn from our experience and will continue to play an important part in advancing the BALTA model and research program.

* Stuart Wulff is BALTA’s coordinator and has responsibility for coordinating the overall BALTA evaluation program.

** Social Sciences and Humanities Research Council of Canada

Uniterra Program: We are Recruiting

The Uniterra program provides numerous opportunities for Canadian citizens and landed immigrants to volunteer abroad in their field of experience. They work with local partners in 13 countries in Africa, Latin America and Asia. Uniterra’s objective is to support development initiatives that address world poverty. Volunteers share their experiences with their community, encourage international solidarity, and help shape policies towards meeting the UN Millennium Development Goals.

Visit their website for more information: www.uniterra.ca (section- Volunteers / Becoming a Volunteer / Current Positions).

http://agora.ceci.ca/postesVacants_en.html
by Carol Murray & Rebecca Pearson

Affordable housing has become a critical component of the social economy across Canada due to escalating housing prices and diminished supply. This BALTA research project investigated the potential for leveraging fully amortized housing cooperative assets (most due to mature between 2017 and 2023) to provide capital for the creation of new cooperative housing to help alleviate the affordability crisis in urban centres.

Upon investigation, however, we found that the main barrier to building new affordable cooperative housing is not access to financing. Access to these assets does not address the high costs of land, labour, and building materials, the main cost drivers of new housing construction. Therefore, the newly constructed housing would be very expensive to build and unaffordable with no offsetting government subsidies.

Additionally, co-ops will face other challenges: the end of their mortgage also spells the end of their federal government subsidy for low-income members. Up to one-third of co-ops are also dealing with deferred maintenance issues and/or repairs related to the leaky condo crisis in BC. Re-mortgaging for subsidy and/or maintenance purposes would leave little or no room for additional leveraging for these co-ops, although other co-ops showed more potential.

Our focus group sessions with co-ops in Edmonton and Vancouver revealed that co-op members are reluctant to take on the high financial risk of development. They had concerns about the impact of such a large project on the culture of their co-op due to the increased complexity of governance and management issues and the stress of the demands of a development project on volunteers. Also, some were concerned that new construction would create “two classes” of members.

While re-mortgaging assets may not be a panacea for the affordable housing crisis, our research revealed the following options for the utilization of housing co-op assets. These could sustain or enhance the affordability of existing co-op housing or address some of the main cost drivers of new co-op housing construction:

- Fund a subsidy pool and/or maintenance needs
- Fill in or replace low-density housing with high-density housing on land that is already owned by a housing cooperative.
- Transition single members living in large units to new smaller units while making existing larger units available to families
- Use redirected housing charge funds to invest in cost-effective “green” infrastructure.
- Establish a national or regional co-op housing development fund through voluntary contributions from individual housing cooperatives (e.g., at 1% of mortgage assets).

Plans are underway for a more lengthy report, a published article and suggested activities for housing co-ops to explore the options for using mature mortgage assets, to be available on the BALTA website.

by James Taylor, Editor, Rimbey Review (Jun 13, 2008)

As part of BALTA, a case study on the Rimbey Farmers’ Market is currently underway, in which its impacts on the community and the factors shaping its success are being examined. Eva Bogdan, a Master’s student at the University of Alberta studying Environmental Sociology is on the verge of completing her study on the local farmer’s market in conjunction with her supervisor, Dr. Mary Beckie, with the Faculty of Extension at the University of Alberta, and a co-investigator with the BALTA research alliance.

“I had the pleasure of working with Mary on another project before – a gardening project for senior immigrants – and she approached me to help with developing a case study on the Rimbey Farmers Market,” Bogdan said when asked how she became involved with the study. This local study is being conducted in parallel with another case study underway on a Vancouver farmers’ market. Dr. Beckie explained why these case studies were taking place.

“Both of these case studies are testing a methodology that will be used throughout the BALTA project. They are also the beginning of a larger research project that will be conducted on farmers’ markets in the two provinces. The researchers and practitioners involved in this project are very interested in the role that local food systems and organic food systems play in the development of the social economy and furthermore how it relates to rural development. We think that farmers’ markets as social economy enterprises play a key role in local food systems, and could play an even more important role, so that is the impetus.

“As you know, farmers’ markets are just that – they are markets, and they are framed by the economic exchange that goes on between local producers and consumers, but the interesting thing about farmers’ markets is that they are also very important social venues and as Gayle Rondeel and other market managers are thinking and doing, they’re also evolving in more ecological and environmental ways as well, so those dimensions are what we’re particularly interested in,” Dr. Beckie said.

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## BALTA's Current Projects

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New 2008—2009 Projects

**SERC 1:**

New projects for SERC 1 include the following:

- **A3 – The Non-Profit Sector Capital Market in B.C. and Alberta**—The project will look at a range of current and potential financing options for the social economy. It began late in 2007-2008 and will continue into this year with a new student hired.

- **A4 – The Role of Faith Based Organizations in the Social Economy**—This project will look at aspects of the current and potential role of faith based organizations with respect to the social economy.

- **A5 – Affordable Housing Assessment and Strategic Planning, Kootenay Region**—This is a project to do an assessment of housing needs and work with pilot communities to develop a strategy and action plan.

**SERC 2:**

New project for SERC 2 include the following:

- **B4 – 2008 Social Economy Case Studies in Rural Alberta**—This project has the possibility to gather significant information about the social economy in several rural Albertan communities each year.

- **B5 – 2008 Farmers’ Markets as Social and Economic Drivers of Local Food Systems**—The goal of this research is to examine and compare the current and potential role of farmers’ markets in BC and AB as social economy drivers for local food systems.

**SERC 3:**

New projects for SERC 3 include the following:

- **Project C7 – Co-operative Development System Case Study – Phase Two: Analysis of Application in B.C. and Alberta**—An action research project to explore applicability of the NS co-op development model as well as other means to strengthen co-op development in Alberta & B.C.

- **Project C9 – CED and Social Economy Policy Inventory in B.C. and Alberta (Phase One)** - This first phase inventory will focus on those aspects of federal & provincial policy that support or thwart the social economy and will include development of a classification framework.

- **Project C10 – Municipal Government Support of the Social Economy Sector**—This project will explore municipal government support of the social economy and is a collaboration with the Prairies node of the CSE Hub and with CCEDNet.

- **Project C12 – Scoping Existing Leadership Development to Strengthen the Social Economy**—A scoping paper to identify the existing research and program situation regarding leadership development as it relates to the social economy.

- **Project C13 – Return on Taxpayer Investment for Training Businesses (Quebec)** - The project will review & summarize, in English, existing research/evaluations from the Quebec experience, providing evidence that can be used by CED, social economy, training and employment networks in other provinces to promote provincial policy changes.

- **Project C14 – Leadership in the Community Sector: Understanding Challenges, Competencies & Needs of Practitioners in the Social Economy**—Research that will support potential development of an MA program in CED and potentially be of broader relevance.

- **Project C15 – Taking Social Embeddedness into Account in Monitoring the State of the Social Economy and Community Resilience**—A discussion paper addressing conceptual issues related both to the underlying principles of the social economy and issues related to measurement and evaluation with respect to the social economy.
NEW 2008/09 PROJECTS (CONT'D)

CROSS-CUTTING PROJECTS

New cross-cutting projects, those which cross more than one SERC, include:

- **Project D3 – Land Tenure and the Social Economy**—An initial exploration of various forms of shared equity land tenure models relevant to the social economy, including both a literature review and collation of other related research within BALTA.

- **Project D4 – Sustainable Infrastructure for the Social Economy: Cluster-Based Social Enterprise Models**—An examination of cluster-based models and their potential for enhancing organization effectiveness and social innovation.

- **Project D5 – Credit Unions as a Financing Source for the Social Economy and Rural Community Re-investment**—This cross-cutting project will examine the scope and roles of credit unions in financing and otherwise supporting the social economy. One aspect will examine the broader reinvestment role of credit unions in rural communities.

MAPPING

New mapping projects include:

- **Project E3-2008—Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study**—This research proposal is to map, through a sustainability lens, the social economy at a neighbourhood level in one Calgary community.

(Continued from page 3)

In examining the data they’ve researched to date, Bogdan said three very distinct themes are beginning to emerge that lend credence to the theory that farmers’ markets are much more than simply the buying and selling of commodities.

“There are some emerging themes that have come out. One of the biggest is the importance of leadership in terms of the farmers’ markets, so with Gayle becoming the manager as of last year – she has a very upbeat personality, she’s very energetic and she has a vision to make the farmers’ market something that Rimby can be proud of,” Bogdan said. “She’s very committed and she also helps vendors gain marketing and customer skills, so she is one of the key components as to why the Rimby’s Farmers’ Market has become so successful.”

Secondly, Bogdan said gaining community support from both the public and the business sector is another key element in the success of markets such as Rimby’s.

“Gayle had mentioned that community businesses have been extremely supportive and overall, this shows strong community pride and spirit and a sense of volunteerism as well that has really helped out with the farmers’ market.”

Thirdly, Bogdan pointed to the strong concerns shown locally for environmental issues and pointed to local bull-dog and Green Party member Joe Anglin as an example of how a community that gains a sense of the environment would be far more likely to support locally grown products.

“Another component that is very important is some of the strong environmental interests and concerns from local community members,” Bogdan said. “Gayle herself, is trying to incorporate more environmental aspects to the market such as rewarding people for reducing plastic bag usage, reusing mugs – those are very important.”

“If I remember correctly, there was a gentleman there who was running for the Green Party and was in opposition to the power lines that were being built, so those examples show, from the research side, that there’s strong environmental concerns in the community which would be important for supporting a local farmers’ market because if there is environmental awareness, then people are more likely to know about the importance of locally produced and seasonally produced foods and support their local producers,” she added.

Once completed, Dr. Beckie said the study may be published and distributed to other areas as an example of how strong leadership, community involvement and a strong sense of the environment, can greatly assist the success of a local farmers market.

Reprinted with permission of the Rimby Review
By Julia Affolderbach

About a year ago, a friend sent me a job posting for research assistantships with BALTA. At that time I was looking for a job that would allow me to work independently with flexible hours while working on my dissertation. I had not heard of BALTA before and was also unfamiliar with the term ‘social economy’ but I was interested in the projects posted and eager to pick up new ideas and perspectives that I could integrate in future teaching or maybe even research projects.

I was offered a position as Senior Mapping Researcher with the BALTA mapping project being led by Mike Gismondi from Athabasca University. Joining the mapping team meant jumping onto a moving train without knowing where it came from and in which direction it was going. Not only was I new to the field of social economy but also to BALTA itself.

The mapping team had developed a questionnaire to profile the social economy in BC and Alberta. BALTA partners had identified organizations that were to be invited to fill out the survey and then their responses were to be merged into a database. This was to be integrated into an online version of the questionnaire. My job was to pick up the different pieces and put them together. This turned out to be anything but straightforward as the pieces didn’t fit together as neatly as expected and as a result I have spent most of my time since focusing on technical and administrative issues to solve these problems.

The mapping project also confronted me with some underlying theoretical questions regarding the concept of social economy. Conducting the online survey has forced me to rethink who constitutes and who identifies with and wants to be part of the social economy. Conducting a survey using a term that might be unfamiliar or alienating to organizations we want to map is one of the challenges of the project.

Even though my work experience with BALTA has sometimes been unstructured or confusing, it has at the same time provided me with great learning opportunities through a number of conferences, workshops and meetings outside of my discipline. I particularly enjoy working together with practitioners and academics from multiple disciplines and backgrounds involved with BALTA – all exceptionally committed and dedicated people with their own visions and perspectives.

(Continued from page 1)

Based research was contested. Few academic colleagues had much exposure to the social economy field. Literally nobody had been involved in such an undertaking to use a SSHRC funded program to build the kind of platform envisioned. Some academics reported that SSHRC projects in their experience were usually a simple matter of dividing the money among the researchers who then hired students and did what they wanted, came together and then published a book. The challenge of engaging in a process that presumed to collectively determine what might be most strategic was a culture shock, intriguing perhaps, but messy.

Following the January ‘07 forum, translating the research proposals into defined research projects was required. Project leads submitted project proposals, vetted them through their SERC and then through the Steering Committee. Busy people took on more than they could handle. Some projects were slow starting as a result. As things got underway, confusion around roles, responsibilities of project leads and what constituted an appropriate level of definition and student supervision created challenges. More fundamental was the over-extension of leadership, especially on the practitioner side, for leading and supervising research projects.

Of particular concern to me, as lead investigator was how to help move the discourse within BALTA to a strategic discussion.

Therefore, between the two planning forums, I drafted a strategic decision making paper. Its aim was to link decisions about what projects received priority back to a set of criteria that emanated from the major goal of BALTA – to strengthen the foundations for growing the social economy.

It got short shrift at the January ‘07 planning forum; it seemed hard enough then just to get through the final decisions on the first round of projects. However, by early 2008 one could detect that these criteria were starting to shape the way people in the SERCs were defining the rationale for their projects. This was evident in many of the deliberations of SERCs and Steering Committee in the March through May period.

At the end of the day, whether BALTA in fact contributes to the growth of the social economy in the region, will depend on two factors: first, will it manage to internalize a capacity to think and plan a strategic and coherent research agenda?; second, and very much related to realizing a strategic research agenda, will be the goal of building a platform where genuine dialogue, respect, and top research and practices are brought to the table to really make a difference?

As we begin to review the evidence in preparation for the mid-term review by SSHRC, the baby steps we have taken are starting to show the promise of bearing fruit. I am very much looking forward to seeing how BALTA makes out as we get put under the microscope of evaluation. My hypothesis is that together, academics, researchers, practitioners and students, we are starting to get it. We are building a culture and have the beginning of a team that can make a difference. We will see. Keep posted.
Andy Dhillon is working towards a Bachelor of Business Administration degree with a specialization in Management Science from the Faculty of Business at Simon Fraser University. He also has an interest in Psychology and plans to use a hybrid approach of the two fields in his future work. From 2006-2007, Andy served as a member on the Board of Governors at Selkirk College, in which he travelled around Canada meeting with other College leaders regarding the future of post secondary education. Andy’s work with BALTA is as a Junior Student Researcher. The main focus of his piece is, under the supervision of George Penfold, focused around community based organizations and the role they play in affordable housing.

Carol Dolbel is working towards a Graduate Diploma in Community Economic Development at Concordia University in Montreal. She also holds a BA Honours in Social Anthropology from the University of King’s College in NS.

Carol’s interest in community economic development and the social economy springs from her interest in other cultures and other ways of doing. Carol lived and worked in Mexico for over two years, with rural indigenous women’s groups and youth. Upon her return to Canada, she volunteered with the Social Justice Committee of Montreal, a human rights NGO that works for economic justice and in solidarity with communities in Latin America. She organized an international conference for the SJC called ¡Arriba las Mujeres! Women Building Strong Communities, which brought together national CED practitioners and women community leaders from Latin America to share strategies and best practices for community development. Currently Carol works to promote international cooperation as a development strategy by mobilizing volunteers for the Uniterra programme.

Carol’s work with BALTA as a Graduate Student Researcher focuses on job insertion training programs and the supportive policy environment in Quebec. She hopes that documenting the Quebec experience, in English, will help share lessons learned with other parts of Canada. Andy Dhillon

Matt Broadbent is a Master’s student in Public Administration at the University of Victoria. His work with BALTA is focused on understanding the Challenges, Competencies and Needs of Practitioners within Community Development. This research is associated with a broader initiative with the University of Victoria, the BC Co-operative Association, the Centre for Non-Profit Management, and the Centre for Community Enterprise are exploring the development of a MA in Community Development program at UVic.

In 2006, Matt earned an Economics degree from McMaster University with an interest in health care and environmental policy. He pursued these interests during his work terms at the School of Public Administration with opportunities at the Vancouver Island Health Authority in strategic planning and at Environment Canada in internal audit. Matt has developed a keen interest in the social economy and looks forward to learning more about initiatives and opportunities within community development.

**BALTA Student Research Assistants**

**BALTA Bits & Bites**, published four times per year, is the newsletter of the BC-Alberta Social Economy Research Alliance. For information about BALTA, please see our website:  
http://www.socialeconomy-bcalberta.ca

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