

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

### **2008-2009 Mapping Program – Workplan**

**1. This workplan includes the main project for “Mapping the Social Economy in BC and Alberta” plus an adjunct Project E3 – “Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study” (the latter project summarized briefly in this plan and then detailed in a separate project proposal).**

**2. Has the workplan been ratified?**

This workplan has been approved by the BALTA steering committee. The adjunct Project E3 – Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study – has been provisionally ratified, subject to a revised proposal being submitted for approval addressing some issues raised by the steering committee.

**3. Changes to the mapping team membership:**

- Dr. Mike Gismondi remains as the Lead.
- Darcy Mitchell and Tim Brigham left BALTA and the mapping team last summer. Sandy Lockhart has retired. Doctoral student Lena Soots continues to consult with us but has moved on to doctoral work in SERC's 2 and 3. Junior student researcher Heather Lynch has finished her term.
- Julia Afforderbach, Doctoral Candidate at Simon Fraser University in Geography, has taken on the role of senior student researcher and will continue in this role.
- Dr. Noel Keough of the University of Calgary, a SERC 2 member, will be a co-lead on adjunct mapping project E3.

**4. Have there been any changes to the strategic vision and plans through to 2011 of the SERC since the 2007-2008 workplan (see Sections 6 and 7 of that workplan). If yes, please explain those changes.**

The initial vision statement for mapping is outlined in the SSHRC application and the mapping discussion paper by Mike Lewis. Essentially the plan is to capture information in key areas that would be useful for the SE practitioner community for lobbying and policy development. The survey by BALTA was designed in discussion with the national Portraiture Committee. Working plans for mapping were shared with BALTA researchers at meetings in 2007 and again refined at the January 2008 meeting in Edmonton. The BALTA online survey was launched in January 2008.

We are focusing on creating a base of work that will allow for longitudinal or future studies. SERC Mapping vision in 2008 remains similar, we are sticking to a long term survey with some scheduled analysis of findings each year.

#### **Detailed 2008-2009 WorkPlan**

**5. Overview of research priorities for 2008-2009 and a rationale for these in terms of the criteria for assessment of workplans (see workplans policy).**

This is an ongoing aspect of the BALTA project. At present only 160 out of a potential 1500+ organizations have filled out our survey. It is our hope to increase that to a 30 percent completion rate or more this year by releasing a first pass analysis of the limited responses to

date and further promoting the survey within SE networks. Work in 2008-9 will build on the experience in year one. It includes plans for further efforts to promote the BALTA survey, a plan for analysis of first findings, a plan for sharing those with the BALTA community, plans for requesting specific survey studies, and some plans for modest case study development. We are also proposing some data conversion to SPSS for future uses.

- General survey to continue until 2010
- Develop advanced analysis of key topics in survey data,
- Develop GIS / mapping representations,
- Provide regular updates on survey results
- Code survey data into SPSS for more robust analysis in future
- Cleaning and minor adjustments to survey (AU)
- Collect network data, compile in excel (and adjust cells in survey (AU)
- Develop script and plan for returning first cut of data back to BALTA members, and plan to use this data to entice others to complete the survey
- Start to compile SE Directory from Survey data (AU)
- Make plans for requests by SE community for specific data information
- Collaborate with others on specialized/modified survey and/or case studies (Frank Moreland, Transition House, United Way Calgary)
- Coordinate standards for the development of case studies and profiles working with all SERCs and develop a student manual for conducting profiles and case studies.
- Collaborate with Noel Keough in SERC 2 – mapping neighbourhood case studies in Calgary (See Project E2 proposal and below) and compare with SE network study in Town of Athabasca.
- A strategy for data storage and repurposing will be developed.
- Recruit replacement for senior student researcher by December 2008.

Lead researcher for the overall mapping program is Dr. Mike Gismondi of Athabasca University ([mikeg@athabascau.ca](mailto:mikeg@athabascau.ca); Tel: 780-6753587). The senior student mapping researcher is Julia Affolderbach of Simon Fraser University ([juliaa@sfu.ca](mailto:juliaa@sfu.ca)).

**6. Brief summary of each proposed research project/activity. Append project proposal for each project.**

<b>Project / Activity Description</b>	<b>Budget, Resources and Other Support Requested from BALTA</b>	<b>In-Kind and Cash Support Provided from Other Sources (where known)</b>
<b>E2 - Mapping the Social Economy in BC and Alberta</b> A continuation of the surveying of SE organizations in the two provinces along with further analysis and dissemination of results.	<b>Students - \$20,085</b> <b>Research Support - \$500</b> <b>Travel - \$1,000</b>  <b>Total = \$21,585</b>  See detailed budget below.	<b>Student - \$10,080</b> <b>Research Support - \$500</b> <b>Knowledge dissemination - \$500</b> In-kind contributions from AU also include survey server hosting, programming, maintenance by programmer as required; teleconferencing; meeting space; phone and laptop for student RA.
<b>E3 - Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study</b> Case studies of the social economy at a neighbourhood level in one part of Calgary and the City of Athabasca, including an examination of their relationships.	<u><b>2008-2009 Fiscal Year</b></u> <b>Student - \$5,525</b>  <u><b>2009-2010 Fiscal Year</b></u> <b>Student - \$1,105</b> <b>Research Support - \$150</b> <b>Travel - \$1,000</b>  <b>Total = \$7,780</b>  See the Project E3 project proposal for budget details.	<u><b>2008-2009 Fiscal Year</b></u> <b>Research Support - \$200</b>  <u><b>2009-2010 Fiscal Year</b></u> <b>Research Support - \$50</b> <b>Knowledge Dissemination - \$500</b> <b>Travel - \$1,000</b>  <b>Total = \$1,750</b> See the Project E3 project proposal for budget details.
<b>Total Budget Requested from BALTA</b>	<b>2008-2009 Total = \$27,110</b> <b>2009-2010 Total to date = \$2,255</b>	<b>2008-2009 Total = \$11,280 ++</b> <b>2009-2010 Total to date = \$1,550</b>

**Detailed budget for the Mapping the Social Economy in BC and Alberta Project**

<b>Category</b>	<b>Requested of BALTA</b>	<b>Other Contributions</b>
Student salaries	Julia – 2 months X \$1,250/mon. & 7 months x \$1,425/mon. = \$12,475 New senior researcher, including month's overlap with Julia 4 months X \$1,425/mon. = \$5,700	Diana - \$20,160 x 50% = \$10,080 (provided by Athabasca University)
Student benefits/overhead (CCCR hire - 10.5%)	Julia - \$1,310 New person - \$600	Included in rate above
Researcher Release Time	none	
Research Support Costs (e.g. supplies, communication costs)	\$500	\$500 (AU)
Knowledge Dissemination		\$500 (AU)
Travel	\$1,000	
<b>TOTALS</b>	<b>\$21,585</b>	<b>\$11,080</b>

Budget explanation for Mapping the Social Economy Project

Student salaries & benefits - 9 Months for Julia as Lead who is still completing thesis until Christmas.; then funding for her replacement; 12 months for Diana at 50 percent of her 80 hrs per month x 21.00 hr (includes benefits).

Travel – \$1,000.00 for meetings.

### Research Tools and Ethical Review:

All approvals are on file for the survey. We will be applying for ethics review for the case studies in Athabasca and Calgary. The case study tool has been developed by Perry with assistance from Gismondi and Beckie and is now being put into a final version.

### **7. Identification of research and activity roles for those SERC members involved in research, including projects and activities identified under #7. Include which SERC members will lead and/or be involved with each project/activity.**

<b>Project / Activity</b>	<b>SERC Members Involved</b>	<b>Role Played</b>
E2 - Mapping the Social Economy in BC and Alberta	<b>Mike Gismondi</b> <b>Julia Affolderbach</b>	<b>Lead</b> <b>Sr. Researcher</b>
E3 - Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study	<b>Mike Gismondi</b> <b>Noel Keough</b>	<b>Co-Lead</b> <b>Co-Lead</b>
National Portraiture Committee	<b>Mike Gismondi</b>	<b>BALTA Liaison</b>

### Student Involvement:

Julia Affolderbach will stay on now until the end of 2008. Julia is an accomplished research administrator. She will be doing the advanced analysis and working to convert the data to spss and developing some more in-depth analysis of data. Julia's work: Survey ongoing; SPSS this summer; advanced analysis July-September.

Diana Shields is a MAIS student working on contract ( 50 percent BALTA focus) with Mike Gismondi of Athabasca University. For BALTA she is working on specific tasks in mapping as they arise. Next year she will work on cleanup of network addresses, compiling the BALTA SE Directory from the survey responses, and follow-up on the survey. Diana will also work with Mike G on developing local case studies in the Athabasca region. She will develop interview skills and basic survey administration skills.

### **8. In any projects where SERC members will not be responsible for managing the project, identify how project leads for those projects will be arranged to ensure that such projects meet the priorities and research needs of the SERC.**

BALTA members will lead all projects.

### **9. Explanation of communication, dissemination and learning/animation plans/needs during the year. What support would be needed from BALTA to assist with this?**

Regular analysis and updates on survey findings. No extra needed. E-distribution and web site. We are working on plans with the BALTA executive for communication of survey findings with other researchers and the community, with an eye to increasing the response rate. Increasing the survey completion rate is our top priority.

For this upcoming year, SERC Mapping will continue to use the BALTA newsletter to disseminate the efforts in research that are underway and have recently been completed.

We plan a small paper on green social economy. On case studies, we plan to write a paper with Noel Keough comparing the findings in rural and urban Alberta on SE networking. Noel Keough has provided further detail on dissemination plans in the proposal for project E3.

We hope to develop a chapter for a national book on portraiture being edited by the CSERP National Hub.

This SERC would like to ensure that BALTA ensures there is time and/or a committee to focus on case study protocols.

**10. General plan for monitoring and evaluation of the research activities of the SERC. (Specific arrangements for individual projects should be described in each project proposal. This workplan section should speak to how the SERC intends to monitor and evaluate its overall progress.)**

Mike Gismondi meets regularly with the lead researchers and assistants face to face or via teleconference. We will follow BALTA protocol for evaluation. Evaluation of survey performance is part of our annual report.

In general, the approach followed will be consistent with the approach being proposed for the other SERCs as outlined below.

Monitoring and evaluation will address both evaluation of the research projects and project results as well as evaluation of the students' performance, student learning and potential impact on the students and their future careers. It is assumed that this will include a mix of written and other reporting, as outlined in BALTA's emerging approach to monitoring and evaluation. A specific plan and tools will be worked out with BALTA's evaluation coordinator, but will include such elements as:

- a. Written final reports on each project;
- b. Written interim reports near fiscal year-end for projects extending beyond the year-end;
- c. Written evaluations for each student employed, both self-assessments and supervisor assessments;
- d. Some follow-up evaluation interviews and focus group sessions to explore other evaluation aspects;
- e. Some form of collective evaluation by the SERC of research results, SERC functioning, etc.