B.C.-Alberta Research Alliance on the Social Economy (BALTA)

BALTA Mapping Workplan – 2007-2008

General

Mapping is a sub activity of the Portraiture Committee. The Steering Committee established a Portraiture Committee, chaired by Mike Gismondi, to guide the mapping and case study research. Other members of the committee are Darcy Mitchell, and Tim Brigham.

Mapping Team

Lena Soots - Lead
Sandy Lockhart – Co-Lead
Mike Gismondi - (Steering Committee Representative)

SERC Advisors to Mapping Cmte.
Jenny Kain (for SERC 1)
Sean Markey (for SERC 2) and
Veronica Vinge (for SERC 3)

Vision Statement

The initial vision statement for mapping is outlined in the SSHRC application and the Mapping Discussion paper by Mike Lewis. Working plans for Mapping were shared with BALTA researchers and refined at the fall 2006 Victoria meeting. A Mapping update was provided at the Vancouver meetings in January, 2007.

This work plan builds on the previously discussed plans (which are available on the BALTA research site under Mapping). We are focusing on creating a base of work that will allow for longitudinal or future studies.

Purpose(s)

- To identify and characterize currently functioning S.E. organizations (and SE support or intermediary organizations) in BC and Alberta;

- To survey these organizations in order to determine the scope and characteristics of the social economy in the region.

Specific BALTA Project Related Objectives

- To document the size, scope and dimensions of the regional social economy.

- To create an information base specifically relevant to S.E. practitioner, researcher and policy interests.

- To identify opportunities for scaling-up within the sector as well as gaps, patterns and areas for further research and case study.

Anticipated Outcomes

- A comprehensive inventory of social economy actors and organizations in the region that can be available for various analytic purposes *(such as follow up case study analysis, comparative analysis, etc.)*

- An initial data scan analysis in which significant functional and structural organizational clusters may be identified and categorized.

- Analysis of the data to abstract organizational progress and outcome indicators among both SE organizations and support or intermediary organizations.

- A strategy for data storage and repurposing will be developed.

Mapping Operational Plan for 2007- 2008 Fiscal Year

There are four primary aspects to the Mapping that will occur in 2007-8.

Activity #1. General Mapping Process

Over the last 7 months, Lena and Sandy have taken the lead on research, background, survey design, and development of the survey instruments. In January, Mike Gismondi was asked to accompany the mapping process in support of survey design, exploring web survey software options, liaison with BALTA SC and National Portraiture Cmt, and supervision of students, and more. (see point 2 and 3 below).

A two step or two phase BALTA mapping process was identified in Vancouver in January 2007. The various timetable components of the proposed mapping and survey work April 2007 to March 2008 are laid out below.

Phase 1 (April to September)

Includes a wide range of work including:

Short survey design for SE organizations and another short survey tool for intermediate organizations; Meeting of core team to develop draft questionnaire.

Development of an information package for potential interviewees that explains the BALTA Project and our reasons for mapping the sector;

Creation of a 'Researcher Handbook" for future student researchers working on mapping;

An online survey software review and a decision on same (this may involve some computing support from Athabasca University if we use PHP Surveyor, or on our own with Survey Monkey- Note AU has confirmed that they support PHP Surveyor and that we may use it);

Web design for the online survey tool (including help features etc.);

A field test of the online survey and software. Note: also we plan to share BALTA survey design with other nodes in order to ask for and incorporate feedback before we go live.

Outputs (see timeline) -   short survey design for review; ethics review; introduction package and researcher's handbook; online survey software chosen and template design; field test; concurrent development of SE Master List to identify potential participants in BALTA survey (see below).

Recruitment of a senior student and two summer graduate students (the former as Lena's near and far future replacement.

Phase 2 (September to March 2008)
Continue and complete Short survey to all sectors;

Ongoing long survey development; long survey handbook development; long survey online survey design; student training;

Data entry and data archiving of first short survey; analysis and report writing about of short survey; web display of map findings, including revised Master lists of organization; analysis of categories.

Student Training and supervision

Activity #2. National Hub Mapping Committee - Timeline Ongoing.

Mike Gismondi is liaison from BALTA to CED National Mapping group. The role includes a bi-directional information flow. As many nodes are ahead of us in operationalizing surveys of various kinds, we will take advantage of their mentoring on key issues related to categorizing organizations and intermediaries, scope of survey design and pitfalls in implementation, data analysis, French language survey issues, etc. This involves bi-monthly teleconferences and staying abreast of the mapping process across Canada.

Activity #3. Developing the Master List of SE Groups for the Mapping Survey. Timeline March 30th 2007 to June 20th 2007

Mike Gismondi and Jenny Kain have developed an RFP to elicit help consolidating a single or master list of SE type organizations (and intermediaries) from a wide range of lists provided by or identified by collaborators. The researcher will review and prepare the Master List for the mapping process. The timeline is March 30 to June 20th, and the work will include the following:

- Confirm the conceptual framework that it will use to categorize the variety of social economy organizations in Alberta and B.C. This will involve reviewing the Quebec literature and revising as necessary for this national context.
- Review the existing lists of CED-type organizations in the two provinces, with a view to sorting them as per the categories identified above. As part of this process, various partner agencies would be contacted and asked to provide their respective lists.
- Organize the existing data into one consolidated database, presumably in software that is most compatible with that of other database owners.
- Confirm the placement of various organizations and identify gaps and next steps. This last "deliverable" would involve committee members in the review process and in developing a strategy for checking the veracity of the information and gathering in new initiatives to add to the database.

The work will be funded with Athabasca University funds and will be conducted by a consultant (We are working with an estimate of $5000.00 plus expenses).

Activity # 4. Student Recruitment - Developing Research Capacity In Mapping

The hiring of summer and year round graduate students proposed in the budget below recognizes the need for succession to replace the current lead mapping researcher Lena Soots who will move on to her doctoral research (and perhaps maintain a small role in Mapping in years 2-5).

The plan is to recruit two summer students and hopefully one longer term graduate student for mapping/portraiture, with at least one summer student working in each province, starting by end of April. The students will participate in t he mapping design and field work strategy, contact and engage key staff from each SE organization or intermediary in the mapping and online survey processes, and conduct follow-up. We will work in the first month to help students come up to speed on BALTA, as well as train them in how to engage interviewees, assist them with the online survey, gather any follow-up information, and use and maintain the main database. Some of the student time may include developing SE profiles and, later, case study work.

Mapping and the Other SERCS.

The Mapping Committee has invited representatives from each of the SERCs to participate in the Mapping Steering Committee to ensure good communication.

The mapping work plans above take into consideration feedback on Mapping provided to date by each SERC at the two BALTA forums.

As well, each SERC has been asked to outline their expectations of mapping, and their contributions to mapping, in their March 2007 SERC work plans.

Once these work plans are approved by the SC, the Mapping group will integrate any additional mapping suggestions and other relevant information about mapping and survey data into our revised or master work plan, for approval by SC by the end of March 2007. And, we expect that we will be using our BALTA contacts/partners to open some doors for us as we start approaching potential interviewees.

We expect a certain synergy between our work and that of the researchers in SERC 3 who will be mining existing information. As part of the Mapping process, we also expect to turn up existing studies and data from research conducted by SE organizations, and will contribute that to the data mining people..

Mapping Timeline / Workplan

Date	Task	Outcome	Notes
Jan 22-28	- Further refine strategy and workplan - Send to Mike G and Sandy for input	Mid to long term mapping strategy and workplan	
Jan 29-Feb 04	- BALTA meetings in Vancouver - Follow up from Vancouver meetings		
Feb 05-11	Research criteria and dimensions for intermediary organizations		
Feb 12-18	** Lena in Nova Scotia – Sandy in Botswana - Mike in Athabasca :)**		
Feb 19-25	Research criteria and dimensions for intermediary organizations		
Feb 26-Mar 04	- Research criteria and dimensions for intermediary organizations cont'd - Look into online survey type options and costs		Mike G exploring PHP Online with AU
Mar 05-11	- Start to Draft Stage 1 survey instruments - Draft budget for Stage 1 - MikeG - Student Plan		General survey and Intermediate Organizations Survey
Mar 12-18	- Draft Stage 1 survey instruments cont - Send budget to Stuart for input and feedback		
Mar 19-25	- Draft Stage 1 survey instruments cont - Start drafting Introductory Package for participants - Start drafting Researcher's Handbook - Student recruitment	Common questions, and specific to general and intermediary sub group	PHP Surveyor support form AU - done. Get translated Case Study from CED Hub Office- done
Mar 26-Apr 01	- Finalize Budget, Finalize Workplan, and Survey details (i.e. format, what program we are using, etc) - Finalize Intro Package - Draft Researcher's Handbook cont'd		

Apr 02-08	▪ Develop training sessions	▪	Need general BALTA information from Stuart including web information, etc
Apr 09-15	▪ Working Draft of both test instruments for Roberts Creek mtgs ▪ Draft survey design and other survey materials (meeting Apr 13th and 14th) ▪ Finalize Researcher's Handbook	▪	Meeting in BC of the team to analyze draft 14-16

Apr 16-22	▪ send out draft to BALTA members for feedback, April 18
	    ▪ pre-test with select organizations (start April 25),
	    ▪ feedback, revisions
	▪ Finalize survey instruments
	▪ Put together Stage 1 mapping research packages for student researchers (including Handbook, Info Package, Survey Instrument)
	▪ Database? Info Management?
	▪ Student recruitment finalized
		▪	

Apr 23-29	▪ Submit Ethics Review ▪ Develop training sessions ▪ Database? Info Management?	▪	
** Lena away April 19 through May 17 **			
Apr 30-May 06	▪ Develop training sessions ▪ Database? Info Management?	▪	

May	▪ Revisions from pre-test,
	    ▪ Finalize instrument (by end of May),
	    ▪ Develop implementation strategy (end of May),
	    ▪ Student recruitment (beginning of May),
	    ▪ researcher's handbook complete (end of May)
		▪	

June	- Revisions from pre-test, - Finalize instrument (by end of May), - Develop implementation strategy (end of May), - Student recruitment (beginning of May), - researcher's handbook complete (end of May) - begin survey process late June • Train and deploy students

July to September

Deploy FT researchers to contact SE organizations and / or intermediaries taking a sector by sector approach over the summer months, assist interviewees in understanding and filling in the Short Online Survey, and follow-up.

Work with Mapping Team to secure data, and begin analysis.

Explore innovative forms of data display using web, charts, and GIS tools

Assist with design of phase 2 survey and support tools.

September to April 2008

Work with Mapping Team to complete Phase 1 survey
And secure data and develop analysis.

Explore innovative forms of data display using web, charts, and GIS tools

Assist with design of phase 2 survey, handbook and other support tools.

Assist in developing work plans for phase 2

Student Supervision

The Mapping Team will be responsible for guiding student research and training.

BALTA's Academic Coordinator will ensure that each student contract and project makes provision for addressing learning objectives.

Research Findings

We are still planning the survey data storage as part of Phase one of the project. Data will reside on a secure server at Athabasca University and be available for future research.

Any research reports and papers will all be stored on the database being developed for BALTA at Athabasca University and will be accessible through the BALTA website.

Mapping Budget Proposal – Mapping 2007 - 8

Senior Mapping Researcher - April 2007 - August 30 (5 months) with option to continue September to March 30th, 2008 (7 months) to assist with development of Phase 2 survey, field test, researcher handbooks, online survey tool development, data analysis, and perhaps some case study work.

$7000.00 FT summer and $5000.00 PT during the school year **Total - $12000**

Survey Researchers - two summer 2007 (one AB, one BC) students to conduct Phase 1 survey work (May 15 to August 15) (telephone contacts, follow-up, data mapping etc.)…PT $4000 each - **Total $8000.00**

Casual winter 2008 researcher/s (September to March casual hours) to continue work on Phase 2 objectives. **$3400.00**

Travel Costs – $1000 (includes travel to work with Mapping students, as well as travel and expenses for Mike G and Sandy to travel to meet with Lena in Roberts Creek for F2F meetings for 2 days/one night. Total= $**1000.00**

Software/ Server costs / Programming - $3000.00 for programming to set up software on Linux server and plan data storage (most to be covered by AU - in kind)

Ask to BALTA = $24,400
To AU = $3000.00 as part of their in kind