

BC-Alberta Social Economy Research Alliance (BALTA)
Project Proposal – Project D3 (2008-2009)

A. Title of project:

D3 – Land Tenure and the Social Economy

B. SERC II: The Social Economy in Rural Revitalization and Development

C. Lead researchers, organization name and contact information, Co-leads:

Mark Roseland SFU roseland@sfu.ca and
Mike Gismondi, Athabasca University mikeg@athabascau.ca.

D. Names of other researchers and organizations involved

SERC 1 Collaborator: Dr. George Penfold
SERC 2 Collaborator: Dr. Hannah Wittman, SFU
Dr. Lorelei Hanson, Athabasca University
Dr. Gloria Filax, Athabasca University

E. Description of project, including objectives, outputs and intended outcomes:

Shared equity land ownership is important in the social economy. Examples of it can be found in a range of sectors including agriculture, housing (in rural and urban municipalities), eco-conservancy, commons management, and in areas of community forestry. Often these land tenure models are unique to the sector, and designed for a specific project.

We propose to examine the range and scale of shared equity land tenure models being used across various sub-sectors of the social economy. These land tenure models include, for example, land banking, communal ownership, various kinds of sector-purposes trusts for agriculture, heritage, etc. This review will also incorporate the legal landscape of land tenure models with respect to taxation, zoning, jurisdiction, etc. in order to develop a model of community-based land acquisition and management.¹

In stage one, a literature review will collect and analyze the range of existing models in BC/AB/ and the broader national and international literature. We will probe these studies for strengths and weaknesses. A thorough coverage of what is out there can be followed by some applied research within sectors – housing, agriculture, eco conservancy, forestry- using interviews and case studies.

Some question we would like to explore are: What is working in other places? What are the issues of transferability to other places? In shared equity land – what are the tenure

¹ Hannah Wittman has done some of this work with Farm Folk/City Folk and The Land Conservancy.

models? What organizational models do these groups use? What ethos binds the group together? Are the patterns different in AB and BC?

We anticipate a number of cross cutting aspects to all this. The range of models being applied in different sectors should provoke new reflection as we look at the models/mechanisms and question transferability or whether we can elevate or combined best practices into one big model/mechanism for shared equity land tenure.

Using the review, we will explore specific projects and sectors to ask whether a land tenure entity or mechanism exists that transcends the various categories. Having one regional organizational 'model' of land trusts makes sense but the problem tends to be that most trusts are issue based. Could one (province-wide) system work better? What efficiencies and what increase in effectiveness are anticipated? Or, do we need sector specific ones?

Regardless of our findings, the review should allow BALTA to envision and create a model or models that would increase community capacity to protect land for housing or agricultural or other commons uses recognizing that project specific models require too much group energy, and that rural SE organizations are especially impacted by capacity issues.

F. Purpose and Significance of the Research

This research responds directly to SERC II objectives. We plan a general analysis of land tenure and its role in the social economy, as well as a series of sector-specific reviews on conservation land trusts, agricultural land tenure/trust issues, and land control as it relates to affordable housing issues and land and cluster-based social enterprise models.

Land trusts in urban areas can cut costs of housing in half in some hot real estate markets. As well, low or no cost lands in municipalities can be targeted for affordable housing. For those who have concerns about the dramatic loss and degradation of habitat and the conversion of rural land into non-agricultural uses, land trusts and the use of conservation easements seem to offer a panacea of sorts. In the agricultural sector, some lands held privately have been protected using trusts to affirm their future in agriculture, protecting quality agricultural land against encroachment by the real estate market. Some of these agricultural trusts are also linked to sustainable agriculture practices and organic marketing initiatives. What are the tenure models? What are the organizational models of these groups? What ethos encourages their actions? Can we identify specific efficiencies and models of effectiveness that at least can be borrowed? As the eco-social crisis heightens we need to explore whether agricultural and conservation land trusts suggest new ways of association for concerned people to take action to confront the environmental crisis.

G. Student Involvement

This project will involve one doctoral level graduate student who has already been identified: Karen Heisler is a PhD student at SFU. She is presently working as a full-time RA for BALTA on Monitoring and Evaluation with Stuart Wulff, but will be available half-time as of September 2008 when her work on the mid-term BALTA review is largely completed.

One PhD prepared RA, Sean Ryan, is already working on conservation trusts in Alberta with the AU group of Dr. Mike Gismondi and Dr. Lorelei Hanson from June to September 2008.

H. Research activities, plan of work and timetable:

A solid Literature Review in Phase 1, with applied sector-relevant (and perhaps SERC-specific) research in the second semester if funds and time permit or else in an as yet unplanned Phase 2.

For the Phase 1 Lit Review, we envision an overview piece based on the work of a PhD-level researcher working from Sept. 08 to April 09, with an interim report in December 08. Also we imagine some smaller auxiliary sector-specific reviews to be incorporated e.g., Mike Gismondi's work on conservation land trusts, Hannah Wittman and Paul Cabaj on agricultural land tenure/trust issues, George Penfold's work on affordable housing issues in the Kootenays, some related work that Jorge Sousa and Lena Soots and Mark Roseland are proposing on cluster-based social enterprise models. Some of this is ongoing, and some might not start until September or January. In any case, there's enough related pieces to convince us that we need someone not only to help with the big picture research, but also someone who can pull together the other pieces of this puzzle.

I. Academic Communication Plan

Within the academic community the results of this research will be communicated via conferences and journal publications. The lead researchers and the student intend to submit a paper proposal to one or two major academic conferences in the areas of sustainability, social economy, and/or geography.

J. Outside Communication Plan

Outside of the academic community the researchers intend to present the research results to a forum of social economy organizations in BC and AB and use BALTA networks to distribute findings. A *Making Waves* article would be a good popular outlet as well as would *Alternatives Journal*.

K. Monitoring and Evaluation

A monitoring system will be set up that will include reporting on research completion; articles generated out of the research; number of presentations of the research in public forums including type of forum and number of people in attendance; external funding attracted to the project; and generation of new research from the project.

L. Research Tools

Since this phase of the project will be a literature review/compilation, no ethical review is necessary.

M. Budget and Contributions

Category	Requested of BALTA	Other Contributions*
Student salaries	\$4500.00 from SERC 2 \$2000.00 from SERC 1 \$2000.00 from SERC 3	
Student benefits/overhead costs (if the student will be a CCCR hire, add 10.5% of the student salaries amount; if the student will be employed by another institution, add the relevant amount)	\$475.00 benefits, SERC 2 \$210.00 benefits, SERC 1 \$210.00 benefits, SERC 3	
Researcher Release Time	n/a	
Research Support Costs (e.g. supplies, communication costs)	250.00	
Knowledge Dissemination	500.00	
Travel	1000.00	
TOTALS	\$6725.00 from SERC 2; \$11, 145.00 BALTA total	

Budget explanation

- Student salaries & benefits: a half-time Ph.D. student researcher for 7 months starting Sept. 08;
Travel and research team meetings: \$1000
- Supplies & other: in-kind supplies including paper, photocopying, some additional funds for research expenses (e.g., phone interviews with key people involved in various land tenure models outside of BALTA region).
- Knowledge dissemination: report reproduction (50 copies)

*** Potential for Complimentary Funding**

- Real Estate Foundations, BC and Alberta
- Columbia Basin Trust
- Agricultural Land Reserves
- The Land Conservancy