

BALTA BITS & BITES

Winter 2009

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VIEWPOINT

Mike Lewis has been travelling extensively, so *Mike's Musings* has been replaced with a viewpoint from BALTA member, Dr. Peter Hall, for this issue of the newsletter. Peter is an assistant professor in Urban Studies at Simon Fraser University and also chairs the Research Advisory Committee of the Canadian Community Economic Development Network (CCEDNet)



Roles and rules: Thinking about research partnerships

by Peter Hall

BALTA and the other social economy Community-University Research Alliances (CURAs) represent a remarkable pan-Canadian experiment in research partnership. Our legacy will be judged primarily by the co-production of supportive policies at all levels of government and by the future development of the social economy sector. But it is also worth reflecting on what we have learned about research partnerships, and acting to sustain the relationships that we have built.

I have been privileged to observe and participate in the partnership from two vantage points: as a university-based member of BALTA and as Chair of the CCEDNet Research Advisory Committee (RAC).

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MID-TERM REVIEW LEADS TO CONTINUED SSHRC FUNDING

By Stuart Wulff

2008 marked the mid-way point in BALTA's five year program of research funded by the Social Sciences and Humanities Research Council of Canada (SSHRC). BALTA went through an in-depth review and evaluation of its evolution and results to date during the June-September period, culminat-

ing in submission of a comprehensive Mid-Term Report to SSHRC in September. In December, we learned that the SSHRC adjudication committee completed a positive assessment of BALTA and that SSHRC has committed to continued funding until 2011.

For further information on the mid-term review, see page 2

PLANNING PROCESS TO FOCUS ON MAXIMIZING BALTA'S IMPACT AND LEGACY

By Stuart Wulff

BALTA's Social Economy Research Clusters (SERCs) and the mapping program have begun planning research programs for the 2009-2010 year. In doing so, they will be aiming to set clearly focused priorities aimed at maximizing the impact of BALTA's research and the longer term legacy from the BALTA research partnership.

At the recent BALTA symposium there was a noticeable sense of progress. Phrases like "BALTA has turned an important corner" were common. At the same time, there were suggestions that, in the

face of global economic and ecological crises, and with SSHRC funding for BALTA ending in a little over two years, we might need to target our research in a limited number of areas to enhance the legacy from BALTA's work.

While a range of research already under way will continue to be supported, the following thematic areas were prioritized for further research:

- Affordable housing
- Food security and local food systems

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BALTA

B.C.-Alberta Social Economy Research Alliance



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MID-TERM EVALUATION HIGHLIGHTS PROGRESS TO DATE

NEED IDENTIFIED TO STRENGTHEN DISSEMINATION

by Stuart Wulff

BALTA's Mid-Term Review with the Social Sciences and Humanities Research Council of Canada (SSHRC) included extensive collection of data, a preliminary written report and conference call with the SSHRC adjudication committee in mid-July, and submission of a comprehensive written report to SSHRC in September.

Karen Heisler's activities as evaluation assistant coordinator, especially the phone interviews done in November 2007 and the written survey in June 2008, were invaluable in gathering data about the development of BALTA as a platform for research partnership and data about specific research results to date.

The SSHRC adjudication committee reacted very favourably to BALTA's attempt to develop a truly innovative model for community-university research partnership. The interviews

with and survey responses from BALTA members showed an appreciation of the considerable challenges in constructing the BALTA platform, but also a recognition that considerable progress has been achieved in effective co-construction of research.

By mid-2008, 33 research projects had been initiated, employing 32 students. Over 60 individuals have participated directly in implementing BALTA's research program. BALTA research results are already being incorporated into five university courses and the development of a new MA program in community development. BALTA's online reader in CED and the social economy is another resource being used in post-secondary education.

The adjudication committee was particularly interested in BALTA's experiences to date in grappling with the definitional and conceptual issues related to the social economy, in reaching out to international audiences and partners

in several countries, and in exploring the potential for the social economy to 'socialize' the public and private sectors, contributing to economic transformation in society as a whole.

While the evaluation noted over 80 discrete dissemination products to date from BALTA's activities (publications, conference papers, research reports, newsletters, etc.), it was noted that published research so far amounted to less than 10 articles and book chapters. This was accepted by the adjudication committee as a reflection of the still relatively early stage of BALTA's research program. They highlighted it as an area for strengthening in the remaining years of SSHRC funding.

A research paper is being developed in 2009 to reflect upon the BALTA partnership model and the results of evaluation to date.

For further information contact:
balta@xplornet.com

NEW BALTA PROJECTS APPROVED BY STEERING COMMITTEE

By Stuart Wulff

Two new research projects were approved by the BALTA steering committee at their January and March meetings, one arising from SERC 1 (Human Services and Housing) and one cross-cutting.

Project A6 – The Fraser Valley Social Economy with Reference to Affordable Housing Provision and Related Support Services

This project will provide a portrait of the nature, dynamics and extent of the social economy in the Upper Fraser Valley, specifically with regard to the provision of affordable housing and related support services. The objectives of the research include:

- Provide a profile of affordable housing and what contributions it and the related social economy

housing providers make economically and socially to the community/region they serve.

- Provide an inventory and description of affordable housing and related social economy housing provision organizations in the FVRD (employment, number of clients, annual budget, etc.).
- Analyze supply of affordable housing and related support services relative to demand, identify support services that are necessary to make affordable housing successful, and identify the policy and program changes necessary to enhance the provision of affordable housing.

The project is led by Dr. Ron van Wyk of BALTA's SERC 1. For further information, contact:

rvanwyk@mccbc.com

Project B6 – Foundations for the So-

cial Economy

At present the strategies, policies and tools employed by the social economy in most countries are diffuse. There is no integrated narrative to bring together the small parts to form a more cohesive whole. This cross-cutting project, led by Mike Lewis and Pat Conaty, is intended to review the scope and success of emergent systemic approaches in order to explore the implications for developing a new social and ecological economy at the sub-regional level. The investigation will produce a new conceptual framework for understanding the foundations for a more strategic approach by social economy actors. In the wake of the credit crunch and developing recession, the project will appraise social economy needs including equitable access to land & premises, patient capital and enabling legal structures.

LAND TENURE AND THE SOCIAL ECONOMY PROJECT EXAMINES LAND TRUSTS AND LAND

(Continued from page 1)

Update on project D3 by Karen Heisler, PhD Candidate, Simon Fraser University

The purpose of this project, which commenced in September 2008, is to understand how shared equity land tenure models function in support of the social economy. Stage one of the research is a literature review to analyze the range of existing models in British Columbia, Alberta and broader national and international contexts.



*Land costs have become a major challenge for providing affordable housing
Photo by: Kootenay Columbia Seniors Housing Cooperative*

Scoping questions for the research design included:

- What is working in other places?
- What are the issues of transferability to other places?
- In shared equity land – what are the tenure models?
- What organizational models do these groups use?
- What ethos binds the group together?
- Are the patterns different in Alberta and British Columbia?

Various systems of land tenure have been identified in various sectors designed to protect or further the public

interest through property regimes. Systems of alternative land tenure being explored are conservation land trusts, community land trusts and different types of land banking. Each system redefines the rights associated with land tenure and has adopted specific practices to work within or around the traditional land tenure system. Examples of how this has been achieved are drawn from Canada, the United States and the United Kingdom.

These three countries share a similar history of common law, although it has been applied differently within each jurisdiction, shaping how property is defined and regulated.

Lessons learned from these alternative land tenure systems will be assessed to identify key components of successful systems and how these components can be applied within various sectors of the social economy. The review will explore models incorporating environmental, cultural, spiritual and social values, exploring if there are common components of each property regime that reflect the different values of the private, public and social economy sectors.

Phase one of the project is nearing completion. BALTA partners should expect to see a draft of the literature

- Alternative/green energy production and opportunities for the social economy to contribute to its development
- Financing and the broader development system/ infrastructure, especially as they relate to co-operatives and social enterprise
- Land trusts and land banks – alternative models for social economy control of and access to land
- Mapping and portraiture – Continuation of the general mapping and development of case studies
- Comparative analysis of cross-cutting trends/issues and cross-priority analysis of best practice and constraints to strengthening the contribution of the social economy to our communities

It was also agreed that we should focus our attention on areas of research where we can identify suitable partners that are well positioned and willing to make further use of our research in strengthening the social economy.

Research plans will be finalized by each team by mid-May and ratified by the BALTA steering committee at their meeting on May 25-26.

review in mid-April. Because this is one of BALTA's first cross-cutting SERC projects, it will be very important for partners with an interest in this research to review the draft and offer feedback and input. A second phase of the project is being designed to gain greater insight into how these different land tenure systems function in practice so successful models can be replicated and scaled up across Alberta and British Columbia.



STRENGTHENING CO-OP DEVELOPMENT IN ALBERTA AND BC

Update on BALTA Project C7 by the C7 Working Group

Phase I of BALTA's research on co-operative development systems involved a case study of the Nova Scotia co-op development system. The goal of this phase II research is to assess whether best practices from the Nova Scotia system, as determined in phase I, could be applied in BC and Alberta. Findings from that study, conducted in 2007 by Lena Soots, showed that the success of the NS system is due to factors such as its small geography, a strong entrepreneurial leader and provincial government support. The data showed that the key components of the system include development finance, planning, advocacy and research, policy and governance, community economic development, and accountability and evaluation.

The Phase II research project is examining how aspects of these components might be customized for BC and Alberta. Eighteen key informants were interviewed and six focus group sessions with 28 participants were held to solicit perspectives on the co-op development system in their respective province. Findings show that:

1. The co-op environment in both provinces is described as struggling, underfunded and not well understood.
2. All respondents identified that current trends have created an opening where co-operatives are particularly suited to be part of the solution in communities.
3. All respondents identified that building awareness, knowledge and alliances with key intermediaries and finance institutions is an important step that would build on existing infrastructure/services.
4. There is not currently the capacity or resources within either provincial association to undertake a focused, multi-functional strategy.

Next steps include holding a strategy session at the AGMs of both provincial associations in June, preparing a final strategy report for wide dissemination, and implementing aspects of the strategy.

For more information, please contact Carol Murray at the BC Co-op Association (Tel: 604-662-3906) or Michele Aasgard at the Alberta Community & Co-operative Association (Tel: 780-963-3766).

RESEARCH ON QUEBEC TRAINING BUSINESSES NEARING COMPLETION

Update on BALTA Project C13 by Carol Dolbel

Carol Dolbel is conducting research on "les entreprises d'insertion", or training businesses, in Quebec. These are non-profit organizations with a mission to address through labour market integration the needs of people living in poverty and social exclusion. They provide job training that offers a real work experience in which participants are paid for their work, and offer personal and social support and accompaniment through the process.

While considerable study of these enterprises has taken place in Quebec, this BALTA project is documenting the results in English to enable Anglophone audiences to become more familiar with this social economy approach within Quebec.

The research documents the early emergence of training businesses, the policies that enabled their development, and the co-construction of supportive policies such as the Framework of Recognition and Financing for Training Businesses, adopted in 1998 by the Québec Minister for Employment and Social Solidarity.

Carol is completing a Graduate Diploma in Community Economic Development at Concordia University. The research is being supervised by Dr. Margie Mendell, Director of the Karl Polanyi Institute of Political Economy at Concordia University.

The research will be completed in spring 2009

FARMERS' MARKETS AS SOCIAL ECONOMY DRIVERS OF LOCAL FOOD SYSTEMS

Update on Project B5 by Hannah Wittman



Vancouver Farmers' Market

Our project is currently focused on examining inter-market connections and their capacity/potential to act as central components of a local food system. Our stellar graduate student research assistants have completed an in-depth literature review of current studies on farmers' markets in North America, which summarize the integral role of FMs in establishing farmer-eater relationships, re-signing value to local food products, assisting the protection of farmland and local economies, and offering local farmers an increased sense of control over their marketing choices.

Despite this, the role of specific markets in local food arrangements, and particularly the ways in which markets and vendors are networked, needs to be explored further. We have embarked on the second phase of our study, a Delphi inquiry with the participation of farmers, market managers and policy experts in BC and Alberta (30 participants). Round 1 is completed and Rounds 2/3 should be completed by the

end of April.

We are in the process of identifying several case study sites in BC and Alberta to analyze the "embeddedness" of FMs in the local food system, e.g. to what extent farmer's markets are linked to other elements of the food chain. We look forward to a second phase of research, in conjunction with the case studies, in which we develop a set of embeddedness indicators. We also plan to conduct a focused analysis of the legal, leadership and decision making structure of FMs in BC and Alberta and how they contribute/detract from social economy development.

We have presented preliminary results at the BALTA symposium in November, as well as at the Faculty of Extension at the University of Alberta, and have papers accepted at the joint meeting of the Agriculture, Food and Human Values Society and the Association for the Study of Food and Society at Penn State University at the end of May.



Vancouver Farmers' Market

BALTA RESEARCH ON FAITH BASED ORGANIZATIONS BEGINS

Update on Project A4 by Stuart Wulff

SERC 1 member, Bob McKeon, has begun research on the role of faith based organizations in the social economy. Originally approved in 2007, this project was put on hold until late 2008. Initial research involves a literature review and a survey of a sample of faith based organizations. This will be followed by

several in-depth case studies. Two student research assistants, Kate Madsen and James Rodrigo, have been employed on the project. The project is being supported by funding from Athabasca University in addition to BALTA.

For further information contact: rmckeon@shaw.ca.

Kate is currently working as a BALTA researcher looking at the role of faith-based organizations in the social economy. She is working with Dr. Bob McKeon and James Rodrigo in Edmonton. Taking a look at the role of such organizations in community economic development has revealed several aspects of social justice that Kate is looking forward to exploring further. She recently completed her BTh (Hons) from Newman

Kate Madsen

Theological College in Edmonton and is currently focusing on an MTS degree with a concentration in Spirituality. Kate's areas of research interest include ecofeminist theology, Celtic spirituality and the works of Thomas Merton. Prior to her academic studies, Kate raised five children and worked as an artisan bread baker



BALTA STUDENT HEADS FOR POST-DOC IN LUXEMBOURG

Julia Affolderbach, who has worked as the senior student researcher on BALTA's mapping program since September 2007, will be leaving BALTA for new horizons. Julia has completed her doctorate at Simon Fraser University and, starting June 15, will be working in a post-doctoral position at the Université du Luxembourg.

Julia's new research will be funded through a grant from the Fonds

National de la Recherche du Luxembourg (a body similar to SSHRC) and focuses on "Negotiating Border Regions: Spatial Planning Processes in Luxembourg and the Greater Region" (border region of Luxembourg, Germany, France and Belgium). It is part of a larger, interdisciplinary project on border studies.

BALTA wishes Julia well in her fu-

ture endeavours.



(Continued from page 1)

At the 2008 CCEDNet Conference, the RAC hosted a workshop on social economy CURAs. Researchers from several regional nodes and the national hub presented their research in a morning session. An afternoon session focused on the dynamics and challenges of research partnerships. One outcome of the workshop is a renewed focus on policy-related research in the national hub. At the upcoming 2009 Conference in Winnipeg, the RAC will host a session highlighting social economy research by and with First Nations and Aboriginal communities.

One lesson I have drawn concerns the tension between roles and rules in research partnerships. We have been learning, especially in BALTA, that roles are flexible. Effective practitioners are already researchers, sensi-

tive to community needs, analytical about the wider context, and reflective about their actions. Effective academics are already practitioners, embedded in community or social movements, serving as responsive and compassionate critics. The challenge to partnerships is not the lack of researchers, rather that we don't always know how to recognize and engage them.

That's where rules are important. All the CURAs have struggled to accommodate these flexible roles within SSHRC's rules. Despite the frustrations they cause, the rules exist to protect students, research participants and taxpayer dollars, and thus probably will not and should not change. Similarly, academics and practitioners in the CURAs have been learning about the systems of incentives and constraints that each face, and about the modes of communication that

each employ.

For these reasons, I think we should pay special attention to instances in which social economy CURAs have dealt creatively with the tension between inflexible rules and fluid roles. Have any partnerships found ways to second community-based researchers to the university, or have any academics and students been seconded to community organizations? Have research subjects (a.k.a. social economy practitioners) been engaged in analysis and dissemination? What about cross-publishing, where practitioners publish peer-reviewed pieces and academics write for community-accessible media? This is not a call for everyone to become a jack-of-all-trades, but rather to say that the ability to work within someone else's system of rules and to communicate in someone else's language is key to building lasting relationships.

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

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