



NEWSLETTER  
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**BALTA**  
BC-Alberta Social Economy Research Alliance

Check us out at: [www.socialeconomy-bcalberta.ca](http://www.socialeconomy-bcalberta.ca)

## BALTA Holds Second Symposium

by Stuart Wulff

**B**ALTA researchers and members gathered in Calgary November 24-25 to share the results of BALTA research to date, learn about recently inaugurated research projects and discuss future directions for

BALTA. BALTA's members were joined by several students working on BALTA research projects and representatives of other organizations with an interest in the social economy.

The symposium was hosted by the Institute for Nonprofit Studies at Mount Royal University.

The first day featured four longer thematic workshops:

**Strengthening the Social Economy Infrastructure and Scaling Up its Impacts**  
– Featured BALTA research on co-

*(Continued on page 2)*



Delegates gather at BALTA's 2009 Symposium in Calgary

### In this issue:

BALTA's second symposium	1, 2	Conference reports	10-11
Mike's Musings – Mobilizing Knowledge	1, 4	Social Enterprise World Forum	5
BALTA gets one year extension	3	Other news	9, 12
Calgary research on social enterprise	3	New resources	6-9, 12
BALTA research updates	5-8		

## Mike's Musings



Acting on what we are learning

By Mike Lewis

**B**ALTA's second symposium highlighted the quality and strategic relevance of much within BALTA's research program. Food, affordable housing, land reform, energy, community level mapping,

greening the social economy and social economizing the green economy; all resonate with challenges we face in the 21st century. Key issues related to growing the social economy, for instance,

*(Continued on page 4)*

# BALTA's 2009 Symposium



Ron van Wyk presents housing research to BALTA Symposium

*(Continued from page 1)*

operative and social economy development systems.

**Building a Supportive Environment for Social Enterprise** – Featured BALTA research on social enterprise financing and procurement and a presentation on non-BALTA research about social enterprises in Calgary (see page 3 separate article).

**Food and the Social Economy** – Featured BALTA research on farmers' markets, the Westlock Grain Terminal and the Seikatsu Co-operative Movement in Japan.

**Municipal Government Support of the Social Economy** – Featured the results of a joint BALTA research project with the Saskatchewan/Manitoba/Northern Ontario node of the Canadian Social Economy Research Partnerships and a presentation on the City of Edmonton supported Edmonton Social Enterprise Fund.

Day 1 also had a presentation on BALTA's mapping program that is surveying social economy organizations in Alberta and BC. Shorter presentations highlighted BALTA research on sustainable development, co-operative models of health care and rural Alberta case studies.

At the end of Day 1, BALTA and the Canadian CED Network (CCEDNet) co-hosted an information and consultation session as a lead-up to the National Summit on a People Centered Economy, which will take place in Ottawa at the end of May 2010.

The focus of the second morning was a presentation by BALTA lead investigator Mike Lewis followed by discussion. The session focused on the implications of climate change and peak oil for the communities in which we live and for the social economy.

Day 2 also featured short presentations on several affordable housing related BALTA projects and other research projects related to land tenure and land trusts, renewable energy, the role of faith based organizations in the social economy, the role of credit unions in supporting the social economy and rural community reinvestment, and cluster based social enterprise models.

Several sessions on the final afternoon focused on potential initiatives and directions for BALTA's work during the remaining period of SSHRC grant support until 2011. This included consideration of options for BALTA support for university level course development and curriculum resources on the social economy and research on possible models to continue BALTA's legacy beyond the end of SSHRC funding. The results of these

discussions will help to shape further program initiatives.

The three BALTA SERCs (social economy research clusters) met over lunch and then reported into a plenary discussion at the end of the afternoon. There was a strong consensus that further BALTA research should focus on filling in gaps in the current research priorities, rather than opening new lines of inquiry, and that the main focus of BALTA work needed to shift towards disseminating and acting on the research results already obtained.

There was a general sense that the symposium marked the further maturing of BALTA's research efforts and an important focusing point towards enhancing our efforts in disseminating and acting on the research finds. Meetings of the SERCs and steering committee in early 2010 will focus on developing plans to achieve that aim.

*See pages 5-8 for short profiles of some of the research projects presented at the symposium. Proceedings from the symposium will be available on BALTA's website in February.*



Rural Secretariat was represented at the symposium by Elliot Hewitt



**SSHRC Provides BALTA with a One Year Extension**

BALTA's principal funder, the Social Sciences and Humanities Research Council of Canada, has extended the deadline for completion of the BALTA project by one year to February 2012.

This does not bring additional funding or oblige BALTA to extend the project for a full additional year.

It does give added flexibility in wrapping up research and allows more time to focus on dissemination and follow-up from BALTA's research.

The BALTA steering committee and SERC co-chairs will meet in March to consider revised plans for completion of the SSHRC funded BALTA program.



# Cluster Based Models

**B**ALTA Project D4 – Clustering the Social Economy – looked at emerging and inspiring models of nonprofit co-location that foster collaboration, social innovation and organizational learning in the social economy sector.

Lena Soots, a PhD student at Simon Fraser University,

was the student researcher for the project, supported by Dr. Jorge Sousa at the University of Alberta and Dr. Mark Roseland at Simon Fraser University.

Their work was presented at the 2009 Conference of the Association for Nonprofit and Social Economy Research (ANSER) with a paper entitled "Collaboration, Innovation and Learning: An

exploration of non-profit shared space" and has led to work with the City of Edmonton exploring models and feasibility for non-profit shared spaces in that city.

For more information, contact Lena Soots at: [lsoots@sfu.ca](mailto:lsoots@sfu.ca).

# Calgary Social Enterprise

**R**esearch on social enterprise activity in Calgary was presented at BALTA's 2009 symposium.

The research was co-sponsored by several funding agencies: Calgary's Family & Community Support Services, The Calgary Foundation and United Way of Calgary and Area.

The social enterprise environmental scan and readiness assessment had the following objectives:

- To better understand current social enterprise and earned income activity in the human service nonprofit sector
- To enhance the ability to support innovation and act upon opportunities, and collaborate effectively with community partners.

For a summary of the research please see:

- <http://www.calgaryunitedway.org/socialenterprise> or

- <http://www.thecalgaryfoundation.org/documents/SocialEnterpriseInCalgary30pager.pdf> or [http://www.calgary.ca/docgallery/bu/cns/fcss/social\\_enterprise\\_in\\_calgary.pdf](http://www.calgary.ca/docgallery/bu/cns/fcss/social_enterprise_in_calgary.pdf)





**SOCIAL  
ENTERPRISE  
SUMMIT 2010  
&  
3rd WORLD  
FORUM**

The Social Enterprise Summit, A New Approach for a New Economy: Realizing the Potential of Social Enterprise will take place April 28-30, 2010 in San Francisco.

Presented by the Social Enterprise Alliance, the annual Summit serves as a launching pad for advancing the social enterprise approach across North America. For more information visit;

<http://www.se-alliance.org/summit.cfm>



# Mike's Musings

*(Continued from page 1)*

procurement and financing of social enterprise, are receiving fruitful attention.

While research that adds value to our priorities will continue into 2011, the emphasis of BALTA's work is shifting. Much more time and effort will be devoted to communication and action related to what BALTA is learning. This has been a weak point in our work to date, with important exceptions.

For example, research on procurement and social enterprise has already been integrated into a robust online tool kit and is also helping shape the content of a theme paper feeding into the National Summit on a People Centred Economy slated for late May of this

Year. BALTA is a partner in this tremendous effort along with other key partners from across the country. Other parts of our work have drawn sufficient interest to have been translated into Japanese, Swedish, French, German and Spanish. We are also starting to see more academic publishing.

However, we've still got a long way to go and I challenge every partner and co-investigator within BALTA to seriously examine options for moving our work out into the broader community. Knowledge without engagement, testing, dialogue and application is not going to make much of a difference in the long term. I and BALTA staff will support this effort, but we need the leaders and

researchers in this network to commit time and energy to help us strategically support this mobilization effort.

We are prepared to support a range of options - Op-eds, popularization of quality research into more accessible articles, organizing of meetings with key constituencies, expanding the market reach of strategic knowledge, etc.

Strengthening the foundation of the social economy in Alberta and BC is the central purpose of BALTA and that requires that we leverage the strategic potential of our work through animating, organizing, communicating and educating. It should be an interesting 18 months.



## New Book for Teaching about the Social Economy

In *Understanding the Social Economy*, Jack Quarter, Laurie Mook, and Ann Armstrong integrate a wide array of organizations founded upon a social mission – social enterprises, nonprofits, co-operatives, credit unions, and community development associations – under the rubric of the ‘social economy.’

This framework facilitates a comprehensive study of Canada’s social sector, an area often neglected in the business curricula despite the important role that these organizations play in Canada’s economy.

Invaluable for business programs that address issues such as  
*(Continued on page 6)*

# BALTA Research

## Social Enterprise Procurement

In partnership with Enterprising Non-Profits (ENP) and the UBC Centre for Sustainability and Social Innovation, BALTA recently completed research on experiences and best practices related to Procurement Policy and Market Development for the Social Economy (Project

C18). The research, which included social enterprises, co-operatives and other social economy businesses, was presented at the BALTA Symposium.

Under the supervision of lead researchers David LePage and Peter Roundhill of ENP, UBC MBA student Amanda Polak conducted research related to the

position of social enterprises within the marketplace supply chain and more specifically with reference to existing and potential procurement policies and systems.

The final product was a web-based “toolkit” that provides the reader with a thorough instruction on how to integrate procurement from social enterprise in an organizational procurement policy. The site also provides a categorization of existing literature on sustainable procurement on a local, national and international level.

To see the Social Enterprise Purchasing Toolkit, go to:

[www.sepurchasing.ca](http://www.sepurchasing.ca)



Diagram from Social Enterprise Purchasing Toolkit

## Municipal Government Support for the Social Economy

BALTA project C10 is a collaboration across BALTA and the Saskatchewan, Manitoba and Northern Ontario node of CSERP. Three researchers (Emma Sharkey, Robyn Webb and Jenny Kain) completed over 35 interviews with local government officials from small, medium and large municipalities across Northern Ontario, Manitoba, Saskatchewan, Alberta and BC in order to

learn more about local government support of the social economy.

The researchers discovered seven common roles that local governments frequently play in support of social economy activities: expressions of intent; financial support; in-kind support; planning, research and advising; human and social capital development; land use; and procurement.

The research also revealed six frameworks that describe common patterns of engagement between local governments and social economy actors: solitudes; coffee shop; partnering;

linking and leveraging; strong and integrated; and ‘how can we help?’.

The final report is expected in early 2010. For further information contact Jenny Kain at:

[jenny.kain@edmonton.ca](mailto:jenny.kain@edmonton.ca)

# New Projects

## Effective Networks & Collaboration

**B**ALTA has initiated a project to research various models of effective networking and collaboration.

The project, led by Dr. Mark Roseland of Simon Fraser University, is intended to assist BALTA in thinking about potential ways to ensure a longer term legacy from the SSHRC funded

BALTA research platform that has developed to date.

The research should also be of broader interest to anyone interested in research networks and coalitions.

The research will be conducted by Freya Kristensen, a doctoral student in Geography at Simon Fraser University.



Freya Kristensen

Freya has previously worked on BALTA research related to credit Unions (D5 and D8).

For further information, contact:

[freya\\_kristensen@sfu.ca](mailto:freya_kristensen@sfu.ca)

## Social Enterprise Capital Providers

**A** new BALTA project (A8), to be launched early in 2010, will survey financing sources for social enterprise in Alberta and BC and develop an online database. The project will be led by Rebecca Pearson of VanCity Capital, a BALTA SERC 1 member. The Alberta portion of the research will be led by Kim Pasula of

Community Capital and CCED-Net. The student research assistant will be Amanda Polak of UBC's Sauder School of Business, who previously worked on Project C18 (Procurement Policy & Market Development for the Social Economy).

The Centre for Sustainability and Social Innovation at UBC is partnering with BALTA on this initiative. For further



Amanda Polak

information, contact:

[Rebecca\\_Pearson@vancity.com](mailto:Rebecca_Pearson@vancity.com)

## Green Energy

**B**ALTA Project B6 (Prospects for Socializing the Green Economy: The Case of Renewable Energy) got off the ground in October, 2009. This project will support ongoing efforts for the creation of social enterprise initiatives for the green economy in Alberta through a comparative



analysis of Alberta's experience to date, best practices and successes in North America and Europe and the identification of a niche and strategy for social economy success in Alberta's renewable energy industry.

The project is being led by Dr. Noel Keough, University of Calgary,

*(Continued on page 8)*

## New Book for Teaching about the Social Economy

*(Continued from page 5)*

community economic development, co-operatives, and nonprofit studies and management, *Understanding the Social Economy* presents a unique set of case studies as well as chapters on organizational design and governance, finance and accounting, and accountability.

For more information contact; University of Toronto Press 1-800-565-9523 or 416-667-7791.





## BALTA Research

# Housing Research

Several BALTA projects during 2009 looked at aspects of affordable and co-op housing.

### A6 – Fraser Valley Affordable Housing and Related Support Services

This research, still under way, will provide a portrait of the nature, dynamics and extent of the social economy in the Fraser Valley, specifically with regard to the provision of affordable housing and concomitant support services.

The research is being conducted by Mennonite Central Committee, BC in collaboration with the Department of Social, Culture and Media Studies at the University of the Fraser Valley (UFV), the BC Centre for Social Enterprise and the Fraser Valley Housing Network. The research team consists of Dr. Ron van Wyk of MCC BC and Dr. Anita van Wyk of UFV assisted by two research assistants, Tanya Jonker, UFV, and Kate McBride, University of Victoria.



The research report is expected to be completed by March 2010. For further information, contact Ron van Wyk: [rvanwyk@mccbc.com](mailto:rvanwyk@mccbc.com)

### A7 – Co-op Housing Design

This participatory action research oriented project involved a team of graduate students from the Faculty of Environmental Design at the University of Calgary working with members of the Sunnyhill Housing Co-operative. The students brought a mix of skills in architecture, urban design, planning and industrial design and worked with the co-op members to produce alternative physical designs for the renovation or reconfiguration of the

existing co-op and, potentially, adjacent municipal-owned land.

The rationale for the project was to test the hypothesis that engaging co-op members in a design-based visioning process can provide a catalyst for creative re-investment in green renovation and/or new and green affordable housing construction, and can advance the incorporation of social enterprise into the co-op housing model. Given that municipal government support and policy is crucial for innovation in housing design, the project also identified barriers and opportunities for municipal government support for sustainable co-operative housing retrofit and new construction.

*(Continued on page 8)*

## New Book

### *Living Economics*

Though it accounts for approximately 8 percent of Canada's GDP, the social economy has only recently begun to receive wider attention in academic circles and beyond.

This book is the first to present, in an accessible manner, the various perspectives being used to explore and analyze this "third sector" of the economy, which includes co-operatives, credit unions, non-profit organizations, the voluntary sector, and social enterprise — activities that emphasize the creation of public good as their primary goal.

The contributors to this groundbreaking book — including many of the leading thinkers in the field from across Canada — grapple with the debates, challenges, and opportunities offered by the social

*(Continued on page 8)*

Check us out at: [www.socialeconomy-bcalberta.ca](http://www.socialeconomy-bcalberta.ca)

# BALTA Research

On October 10 the 5-member student project team facilitated a very successful all day design charette in a tent erected on the grounds of the co-op. About half of the co-op's members participated in the charette.

The project final design will produce a masterplan social economy vision for the Sunnyhill Housing Co-op, including the current co-op and lands now owned and occupied by the Calgary Curling Club and the city-owned surface parking lot. The design project will also be documented as a possible approach for use with other housing co-ops.

A final report will be available in early 2010. For further information contact Noel Keough: [nkeough@ucalgary.ca](mailto:nkeough@ucalgary.ca)

## A9 – Sustainable Management of Housing in Response to Decreasing Government Funding

This research was done by Jana Svedova, an MBA student in the Sauder School of Business at

UBC. The research employed a mix of initial interviews and then several case studies, looking at affordable housing involving both not-for-profit organizations and co-ops.

The research found that key methods used by not-for-profits and coops in BC and Alberta to reduce dependency on government funding sources include: use

of volunteers, inter-organizational collaboration, various low or below market land acquisition strategies, use of green construction standards, social enterprises, partnerships with for-profit development and corporate alliances. Leadership, willingness to accept risk, the legal and policy context in the region and organizational mandate were key factors in determining success. Social enterprise is not a significant contributor to financial sustainability in the cases reviewed.

For further information, contact:

[gpenfold@selkirk.ca](mailto:gpenfold@selkirk.ca) or

[joanna.buczowska@sauder.ubc.ca](mailto:joanna.buczowska@sauder.ubc.ca)

## Green Energy

*(Continued from page 6)*

Faculty of Environmental Design, and Paul Cabaj, Canadian Centre for Community Renewal.

The student researcher on the project is Julie MacArthur. Julie is a PhD candidate in Political Science at Simon Fraser University. Her dissertation research maps and examines the development of co-operatives in Canada's energy sector. She focuses on how comparative provincial policies have shaped the sector and how broader trends

in Canada's political economy create opportunities and challenges for co-ops. This is her first project with BALTA. Julie's other academic interests are in global political economy, human security and environmental policy.

For further information contact: [nkeough@ucalgary.ca](mailto:nkeough@ucalgary.ca)



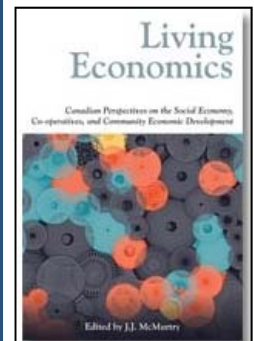
Julie MacArthur

## New Book *Living Economics*

*(Continued from page 7)*

economy as Canada experiences rapid changes in the 21st century, be they economic, industrial, environmental, or social.

For more information contact 1-888-837-0815.



## Have an Idea? We Need Great Photographs!

of both BALTA research in action and of the social economy sectors / organizations that BALTA is researching. Contact Jennifer Lee Jones [jjones@cedworks.com](mailto:jjones@cedworks.com)



## BC Scholarship Winner

The Canadian Social Economy Research Partnerships, of which BALTA is a member node, announced its second group of “emerging leaders in the social economy” scholarship

winners. The scholarships are intended to support candidates to strengthen the social economy through their academic research.



Emily McGiffin

One of the four recipients is Emily McGiffin. Emily has worked at the intersection of food, community and land stewardship for the past 10 years. She lives on an organic farm in the rural community of Hazelton, BC, where she is actively involved in sustainable food production and community economic development.

## Work Honoured

On September 18, 2009. Mike Lewis was presented with the BC Council for International Co-operation’s ‘Commitment to Global Cooperation’ Award. Mike is the Executive Director, Canadian Centre for Community Renewal and Lead Investigator, BC-Alberta Social Economy Research Alliance. This annual award is given to individuals that have demonstrated exceptional leadership, resourcefulness and commitment to international cooperation.

Mike was one of several British Columbians from across the province who were honored for giving

true meaning to the adage, “Think Global, Act Local”, at the first annual BCCIC Global Cooperation Awards. BCCIC is a coalition of over forty British Columbian voluntary international development organizations that are committed to achieving

sustainable global development in a peaceful and healthy environment, with social justice, human dignity, and participation for all.



On the right Mike Lewis receiving his award.

### 2010 International Conference on Social Capital

The Social Capital Foundation is holding an international conference in 2010 on social capital. A wide range of social capital related topics will be included.

Dates: May 7-10, 2010

Venue: Malta

Deadline for Submissions: February 15, 2010

For further information:

[www.socialcapital-foundation.org](http://www.socialcapital-foundation.org)

## BALTA Presentations in Sweden

**B**ALTA members Mike Lewis and Pat Conaty attended the 2<sup>nd</sup> International CIRIEC Research

Conference on the Social Economy in Östersund, Sweden, on October 1-2. The conference attracted over 300 participants and more than 160 papers were delivered. The conference explored a number of important issues in the social economy, including barriers to development of the social economy and interactions with the public and private sectors.

Mike and Pat delivered a paper on “The Great Transition: Navigating Social, Economic, Ecological Change in Turbulent Times”. Their session was well attended (approx. 60) and participant comments included: “refreshing”, “challenging”, “outside of the box” and “inspiring”.

Mike and Pat also attended several workshops and meetings in Stockholm and Östersund with social economy representatives, Transition Town members, government representatives, bankers, researchers, students, journalists, farmers and

others that included discussion of the CIRIEC paper and its themes. The paper has already been translated into Swedish.

As one of BALTA’s initiatives, Mike and Pat are developing a book to deepen the analysis presented briefly in the CIRIEC paper. The enthusiastic response to the paper to date is indicative that the book should draw wide interest. The paper is now being translated into French and Spanish and those versions should be available soon.

To read the paper go to: <http://www.scribd.com/doc/21656220/The-Great-Transition-Navigating-Social-Economic-Ecological-Change-in-Turbulent-Times>



## The Worth of the Social Economy

**T**he new book *The Worth of the Social Economy: An International Perspective* seeks to make a critical assessment of the interests to which the social economy of today must cater and for which questions of evaluation appear to be the

most telling.

Contributions include; theoretical papers inspired by various disciplinary fields: management, economy, sociology, philosophy and national analyses of how the social economy is evaluated in different institutional contexts in various

countries.

The book summarizes the study and proposes some reflections addressed to policy designers, evaluation specialists and social economy actors.

For more information visit [www.peterlang.com](http://www.peterlang.com)

# Conference Reports

## RESILIENT CITIES

By Sean Connelly

**G**aining Ground, Smart Growth BC and the Canadian Society for Ecological Economics joined forces to put together the Resilient Cities conference in Vancouver Oct 20th-22nd.

The conference plenaries, workshops and sessions brought together over 600 participants, all united by the common goal of improving the quality of life for our communities within the context of environmental constraints.

BALTA was represented by a

presentation by Mark Roseland and Sean Markey that highlighted the transformative potential of linking sustainable development with the social economy.

The overall conference message in one key point was our cities and the unsustainable systems that produce them have been extremely resilient.

What we need are resilient cities based on a new system, one based on localized, community-based responses, on collective action and collective responsibility and we need it yesterday.



*Sean Connelly, recently awarded his doctorate by Simon Fraser University, is currently working with BALTA as a one year post-doctoral researcher.*

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## Creating a Shared Vision for Social Enterprise

**T**he first national policy forum on creating a supportive environment for social enterprise was successful at building a shared framework and vision for the sector, say several event organizers.

The two-day event that was part of the third Canadian Conference on Social Enterprise brought together social enterprise stakeholders ranging from sectors as diverse as non-profit, for-profit, finance, universities and government to co-create a policy agenda based on a framework established by the Social Enterprise Council (SEC) of Canada.

Read more at: [http://www.enterprisingnonprofits.ca/enupdate/first-national-policy-forum-building-collaborative-framework-shared-vision-social-enterpri?utm\\_source=enp+Email+Newsletter+Mailing+List&utm\\_ca](http://www.enterprisingnonprofits.ca/enupdate/first-national-policy-forum-building-collaborative-framework-shared-vision-social-enterpri?utm_source=enp+Email+Newsletter+Mailing+List&utm_ca)

[mpaign=87bf69660f-Enp\\_Notes\\_December\\_1\\_2009&utm\\_medium=email](http://www.enterprisingnonprofits.ca/enupdate/first-national-policy-forum-building-collaborative-framework-shared-vision-social-enterpri?utm_source=enp+Email+Newsletter+Mailing+List&utm_campaign=87bf69660f-Enp_Notes_December_1_2009&utm_medium=email)



**BALTA  
STEERING  
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Mike Lewis, Lead Investigator, Canadian Centre for Community Renewal

Dr. Mary Beckie, Co-Investigator, University of Alberta

Dr. Martin Garber-Conrad, Co-Investigator, Edmonton Community Foundation

Dr. Michael Gismondi, Co-Investigator, Athabasca University

George Penfold, Co-Investigator, Rural Innovation Chair, Selkirk College

Dr. Mark Roseland, Co-Investigator, Simon Fraser University

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Stuart Wulff

Jennifer Lee Jones

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## Internship Awarded

**M**arc-Elie Scott, a fourth-year policy studies student is the first recipient of Mount Royal

University's Institute for Non-profit Studies Student Research Internship 2009-2010.

Marc-Elie, working under the guidance of Dr. Peter Elson,

Senior Research Associate, will have the opportunity to learn and apply a variety of non-profit related research skills, and to undertake his own research project.

For more information, contact: Peter R. Elson, PhD [pelson@mtroyal.ca](mailto:pelson@mtroyal.ca)

## Alberta Charity Atlas

**T**he Institute for Nonprofit Studies, Mount Royal University is pleased to announce the publication of The Atlas of Alberta's Charities. Focused on Calgary and Medicine Hat, the atlas combines data from the T3010 data set held by Revenue



Canada and 2006 Census data.

The selected maps showcase the ability of the Institute to manipulate multiple data sets that have

been largely untouched by the charitable sector to produce maps that demonstrate relationships between charities and the communities in which they operate.

With this first step, the Institute for Nonprofit Studies begins a series of initiatives utilizing mapping technologies to assist the sector and others to understand the relationships between charities and community.

Our next step is a portal to a public interface that will allow registered users to create their own maps as needed.

The link to the atlas is: <http://www.mtroyal.ca/wcm/groups/public/documents/pdf/charitymap.pdf>