

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

Project Proposal – Project E4-2009

- A. Title of project:** **BALTA Mapping 2009-2010 – Survey, Survey Analysis, and Data Archiving**
- B. With which BALTA SERC Is this project associated? Or is it a cross cutting project?**

a. This is a mapping project led by the BALTA MAPPING TEAM

- C. Lead researcher, organization name and contact information:**

a. Dr. Mike Gismondi, Athabasca University mikeg@athabascau.ca

The role of the lead and co-researcher is to supervise the research assistant by reviewing and providing comments to draft research work plans and reports throughout the duration of the project.

In addition, the leads will participate in the design and implementation of data analyses in a number of key BALTA priority areas, as well as in areas as requested by BALTA collaborators.

- D. Names of other researchers and organizations involved:**

**a. Dr. Lynda Ross Athabasca University;
Dr. Julia Affolderbach SFU (until June 30 2009 – on student salary until April 30)
Student RA TBA (July 2009 - April 2010)**

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

Description

This is an ongoing project. We are now moving from data collection to data analysis, although some collection will continue to occur.

Background

In January 2008, BALTA launched a social economy online survey aimed at identifying the scope and scale of the social economy in British Columbia (BC) and Alberta including evidence of its economic, social and environmental significance. Design and implementation of the mapping survey were guided by a number of objectives including:

1. to compile an inventory of social economy actors and organizations in BC and Alberta that illustrates the scope and scale of the sector;
2. to categorize and survey social economy organizations in order to understand the characteristics, structure and function for the social economy and its actors;
3. to provide information to BALTA members for research and analytical purposes;
4. to identify trends, patterns, gaps and opportunities for scaling up within the sector as well as opportunities for case studies and future research;

5. to provide data and information relevant to practitioners, academics and policy makers for the purpose of strengthening the foundations of the social economy in BC and Alberta;
6. to provide tools to participating organizations that will allow them to build up support and information networks.

The online survey can be accessed online from the BALTA Mapping website (<http://www.socialeconomy-bcalberta.ca/mapping.html>) and will stay active throughout the duration of the project. The survey covers a broad range of questions on the scope and scale of the social economy in the two provinces. At present we have collected approximately 240 survey responses. See latest Report May 2009.

Dr. Mike Gismondi and Senior Researcher Dr. Julia Affolderbach have been managing this project to date. In early 2009, we invited Dr. Lynda Ross to join the team. Lynda is a survey and data analysis specialist and professor of Women's Studies at Athabasca University. Lynda has taken on a co-investigator role related to Mapping.

Since January she has been working with Julia and Mike to:

1. Review current BALTA survey results and their conversion into SPSS.
2. Double check SPSS coding and setup, run some basic queries, and become familiar with data, test etc.
3. Provide advice on data analysis as per our December planning meetings with the larger Mapping Discussion Group.
4. Develop a draft plan to run frequencies, examine indices, cross tabs, ideal type matching, and to check missing data and to develop an overall approach to using the overall data that has been collected.
5. As well Lynda and Julia have worked to ensure all temporary Mapping data analysis in SPSS is securely moved back from Julia A. (Lead Std Researcher) to Lynda and AU.

Where feasible, we will continue to explore further ways to increase response rate. For example, we have been working with SERCs who are conducting field work and case study work and they have been asking SE groups to complete the survey, and in some cases assisting them.

We have been meeting by group teleconference 2 times a month to refine our approach to the data in the next phase.

The objectives of the next phase of Mapping :

1. Continue to increase responses to the BALTA Survey over the next 18 months (or longer if we extend the project).
2. Work on an overall analysis of the data set.
3. Consult with BALTA members in each SERC to solicit research questions that we can then ask of the data set, and that will assist them in their sub-areas of research.
4. Identify potential organizations in the survey that we might wish to research further using the case study method.
5. Explore how mapping findings can be used to influence policy and policy makers and practitioner/decision makers.

F. Research activities, plan of work and timetable:

Objective 1 Continue to increase responses to the BALTA Survey over the next 18 months (or longer if we extend the project).

Research Activities

Leave survey open. Monitor responses rates and integrate new survey data with existing data base.

We have started to move the survey to LimeSurvey and plan to simplify it somewhat by offering an optional route through it allowing people to complete the financial information later. We propose that when we meet with each SERC (see Objective 3,4,5, below) to discuss research questions they wish to pursue, we will use that opportunity to seek suggestion on how to increase response rates. .

Objective 2

Research Activities: Work on an overall analysis of the data set.

- 1. Lynda to work with student to convert data from multiple into single variables, sub coding or recoding data into numerical data, converting some qualitative data into numerical data to facilitate analysis. Provide summaries of the data.**
2. Team to define and refine SE continuum and run analyses. We began with 5-6 criteria to establish these common indicators (based on literature and discussions with practitioners). We are developing a SE continuum using our criteria (and other emerging ones) to develop a more nuanced assessment of the SE.

The next three objectives represent a new turn in the mapping work. For us to be successful as a group will require a more dynamic relationship between SERC researchers and the mapping team. The Mapping people would like to meet early in the fall with each SERC via teleconference to explore in general terms how the researchers might identify research questions and submit questions via our group that will allow them and us to explore the data collected to date from the survey.

Objective 3 Consult with BALTA members in each SERC to solicit research questions that we can then ask of the data set, and that will assist them in their sub-areas of research.

Research Activities:

Early fall teleconference with each SERC. Individual researcher discussions as required. Lynda is away in June, Mike is away July, so we might be able to start some of this in August, but let's plan for September.

When a member of the SERC group provides a question/s, Lynda will do the analysis and provide the summaries to support their work.

Objective 4: Identify potential organizations in the survey that we might wish to research further using the case study method.

Research Activities:

SERC researchers to suggest fruitful case study analysis opportunities by sector, or activity or variable. We will provide data summaries.

Julia and Mike will examine cases of environmental organizations as a sub-set. We hope to identify some organizations for case study work.

Lynda has expressed an interest in exploring gender and the SE. We are discussing a plan for examining data related to this area.

Objective 5: Explore how mapping findings can be used to influence policy and policy makers and practitioner/decision makers.

Research Activity – Work with SERC colleagues to determine ways to strategically approach mapping and analysis of findings to impact both practitioners and policy.

Other mapping work for RA to do:

1. General work on increasing completion rates by working with partners etc (David LePage, United Way, faith based, Karsten and Rural; Noel and Calgary; George and Columbia Basin Group)...
2. Follow up on ½ complete surveys (not uploaded)
3. Working with Uploaded surveys that are partial or lack financials to gather this key missing data...
4. Follow Up on Directory and Social Software for groups in the sector.
5. Minor revision to online survey to increase its response rates on financial data. Move to LimeSurvey.

Objective 6: Project E 3 Neighbourhood Case Study Analysis, and SERC Case Study Analysis in general.

Project E3 comprises a series of case studies of SE organizations in one Calgary neighborhood. The student (Celia Lee) has completed a series of case studies and will be using these as part of her thesis analysis that she will defend in June. Noel K. is her supervisor and MikeG is on the MA committee. As part of that work we will be developing a neighborhood analysis discussion piece. The comparison with Town of Athabasca did not occur when the Mike's RA moved from the town. Celia completed a more than sufficient number of case studies for the single neighbourhood analysis proposed.

Research Activity

Other SERC Researchers have been have been collecting SE organization case studies in the various SERC projects and following the BALTA Case Study model.

The Mapping group have asked people to code this work for future analysis. We expect that this year 2009-10 the Mapping group need only reassert the need for all SERC people to use the coding format and to increase the range of case studies. See Objective 3-5 above. We will use these meetings to ask for an increase in case studies in general.

Researchers to upload case studies to AU Space..

SERCS need to plan for meta or cross case analysis in last year of BALTA project.

G. Purpose and significance of the research, including congruence with the strategic research objectives identified for the SERC and BALTA. Why should this project be approved, given BALTA's limited resources? [Refer to the project criteria in the BALTA Workplans and Project Proposals Policy.]

We believe the survey data can be used to support work across the entire project. We plan to develop some key sets of analyses based on the core criteria identified in our mapping discussion papers in BALTA, but we also expect that unique data set requests will be forthcoming from SERC groups for their own or joint analyses. For example, questions about all who are involved in a sector, or in a geographic region.

The intent for the case study work was to collect, code and make it available for all SERC researchers to use in comparative analysis. It is proposed that in the last year of the project, the SERCs may wish to commission some cross case analysis.

H. Will the project involve student researchers in a paid or unpaid capacity? If yes, will they need to be recruited or have they already been identified? Briefly describe the roles and responsibilities of students involved in the research project, the skills/experience they will acquire, and how this will complement their academic training. Explain as well how adequate supervision and support of the student will be ensured.

We are seeking funding for one student research assistant. A senior PhD student will be invited to take on the role that Julia Affolderbach is leaving as the lead research assistant on this project. His/her primary responsibilities will be to work with the project team to maintain the survey, continue to increase response rate, collaborate with the team on creative engagement and analyses with the data. She/he will also work with SERCs to refine their proposals for data queries of the main data base. We expect that Dr. Ross will run most of these requests, although if the student is SPSS prepared they can collaborate in this level of work.

The RA will also be involved in writing of the final reports, presenting work at conferences, writing drafts with the team for publication, and working to guarantee

data storage and archiving of all related survey research materials related to the survey at the end of the BALTA Project.

Contract period would begin July 1, 2009 to April 30, 2010.

I. Describe plans for communicating research results within the academic community. Indicate audience and specific output(s) i.e., refereed journal articles, conference presentations or other appropriate channels.

- **2 refereed journal articles**
- **2 conference presentations**
- **A popular article/newspaper piece**
- **Web page reports and data on AUSpace**

J. Describe plans for communicating research results outside the academic community to practitioners, policy makers, and other people for whom the research results could be significant. Indicate audience and specific output(s).

- **Presentation to appropriate social economy professional conferences**
- **Presentation to MLAs and Municipal Officials (especially when we have some policy ideas to promote).**

K. Describe your plans for monitoring and evaluating your research project. Feel free to consult with BALTA's Coordinator on designing possible approaches. (Note that monitoring and evaluation are extremely important both for ensuring the success of the project as well as satisfying reporting to SSHRC.)

Evaluation of the success of this phase will be measured through the completion of research activities as detailed above, including an accounting of the level of participation of BALTA partners and social economy actors in the request to conduct sub-analyses of data. The success of this phase is highly dependent on participation of all groups.

Response to our articles and conference presentations.

We also plan to meet 2 times a month with the RA, using conference calls.

L. What are the research tools you propose to use in your project?

NOTE: If your research involves human subjects, you MUST provide copies of your proposed research tools (as well as your research plan) prior to commencing research. Please see the document "*BALTA Ethical Review Process – Simplified*" for information about ethical review requirements.

Research ethics and online survey already approved.

M. Budget and Contributions

Category	Requested of BALTA	Other Contributions
PhD Senior Student – Julia Affoderbach for April 2009	\$1,875	
PhD Senior Student 1 = \$25/hr*32hr/month*10 months	\$8,000	
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)	\$197 \$840	
Researcher Release Time Dr Ross	\$10,000	1 Year support time contributed by M. Gismondi
Research Support Costs (e.g. supplies, communication costs)	\$250	AU conference calls
Knowledge Dissemination	\$250	
Travel	\$1,500	\$1,000 AU M. Gismondi
TOTALS	\$22,912	

Budget explanation

Student salaries & benefits - As per policy for one year.

Researcher release time – As per correspondence with AU and Dr. Ross and BALTA.

Travel – Will cover costs of Dr. Ross and student. Gismondi will use release funds from AU

Supplies & other – subsidizing some basic costs, xeroxing, etc.

Knowledge dissemination – subsidizing costs and per diem at conference