

**BC-Alberta Social Economy Research Alliance (BALTA)**  
**Mapping and Portraiture Group Workplan 2010-2011**  
**and Moving Towards Final Wrap Up**

**Report on Last Year**

**2009-10 was a different year.**

Julia A. left last summer after presenting findings at the 2009 ANSER conference. Dr. Lynda Ross and I provided an update on our work at the fall symposium in Calgary.

Updates on the BALTA Social Economy Survey

- Responses ending in the Fall of 2008 = 211 (Affolderbach & Gismondi, 2008)
- Responses ending in the Fall of 2009 = 258 (Note: incl. data from 29 new social economy organizations from the Faith Based Survey of Alberta and BC which were recently entered)

We hired a new mapping RA student only in March, Ashley Smith of SFU. Given the long delay in hiring, we have used the funds already approved for 2009-2010 to extend her contract to the end of December 2010. Assuming further funding is approved and if her student status allows, we would like to extend her contract to April 2011.

Mike Gismondi has hired Ms. Juanita Marois, MA, to work with him until Christmas (using AU Release funds). Juanita will work with Ashley on survey completion this next semester and work with Mike G on furthering case studies of Athabasca region, northern Alberta, and a number of green social enterprises.

**SUB Surveys and MAIN Survey**

Lynda and Mike have reviewed a series of survey proposals from other SERCs and coordinated with those researchers in design of surveys to include data relevant to the main BALTA survey. When they complete their sub-surveys, Lynda will integrate their findings into the main BALTA survey.

We expect their responses to be in and collated by late summer 2010.

- Rebecca Pearson – Social Economy Capital Providers (Project A8)
- Peter Elson and Peter Hall – Social Enterprises in BC (n-300) and AB (n-105) on the survey call lists (Project C16)
- Ron Van Wyck – Affordable Housing in BC Fraser Valley (Project A6)
- Faith Based survey is now integrated (Project A4)

The new project proposed by SERC 1 to survey recently incorporated co-ops in Alberta and BC could be coordinated with the mapping to add further to the mapping data.

Lynda and Mike drafted the SE continuum paper for discussion at last fall's BALTA conference. We will revise this paper for publication once we increase response rate and review data from sub-survey groups.

### **Case Studies**

Celia Lee has moved ahead and rewritten her case studies from Calgary. Mike's student completed a MAIS MA project study of the 10000 Villages Organization. Juanita M. will convert it to the template.

### **Portraiture Group Workplan 2010-11**

1. Ongoing efforts to increase sample:

- a. Graduate student began March 2010 to work on increasing participation in the main Social Economy Survey with an emphasis on sectors not addressed by other survey efforts (see below); Mike G's researcher Juanita will also assist. Timelines 3 months (review progress), and 6months (wrap up and subset)
- b. Subset of items from the main SE Survey are being added to other BALTA/SERC project surveys, including Social Economy Capital Providers (Rebecca P.); Housing in the Fraser Valley Survey (Ron VW); and Enterprising Non-Profits Survey (The Two Peters)

(Note: Data collected from these surveys will provide a substantial amount of information to continue with our overall description and analyses of social economy organizations in Alberta and BC.)

- c. RAs will also identify potential exemplary case study candidates; and review mapping findings from other Canadian regions, as available.
- d. Ashley and Juanita each have specific strengths- Ashley has worked in inner BC with community forestry cooperatives/societies and we hope to do some survey and case study work with a few of them; Juanita lives in Athabasca region and she will work with Mike to do some local case studies, and try to revive our comparative piece with Noel Keough comparing Calgary neighborhood and a rural SE community (originally intended as part of Project E3). Juanita also has work experience with Alberta Metis society and we hope to find some SE organizations at work in this community in Alberta (for survey or case studies).

Analysis and Interpretation (and dissemination strategy).

- Update BC-Alberta Survey Findings descriptive/analytical paper – seek to publish in Canadian social science journal; develop popular article for magazine; develop fact sheet for practitioners/and power point. (TEAM)

- Develop SE Continuum paper for publication. ANSER Journal (Fall 2010 Lynda and MikeG) Talk at ANSER 2011.
- Green SEEnterprises paper – started with Lena and Julia, still in play using survey findings...we will try to make sure these groups fill out our survey.

#### Comparative Work

- RAs to start collecting comparative survey findings summer 2010.
- Develop comparative paper contrasting patterns in BC and AB with each other, and with other SE Survey findings across Canada. Write versions for practitioners and for academics (Fall 2010 - Team)
- Lynda is considering a paper on gender using our BALTA findings, which may compare to other regions

#### Case Study Research 2010- 2011

- Collect and develop case Studies as per BALTA Guidelines
- Take lead to develop an analytical paper doing cross case analysis of collected studies
- Develop paper on Green SEEnterprises based on survey and case study work (Mike Lead)
- Other projects/data resulting from SE Survey: A number of case studies have already resulted
- Develop another 10 case studies with student and RA over the next 9 months.
- Encourage other SERCs to complete a few demonstrative case studies in their sector work. See List of Case Studies completed to date, below. A priority for the Mapping group will be to work with SERC members in next 6 months to encourage them to develop case studies.
- In the last year of BALTA, we hope to form a working group to do comprehensive cross-case analysis of BALTA cases studies.

#### **Budget Implications**

**Release time funding** – The steering committee previously approved \$10,000 in each of 2009-2010 and 2010-2011 for Lynda Ross. The second year of funding would apply to this plan period.

**Student funding** – Ashley's contract to December 31, 2010 is covered by funds approved last year. For 2010-2011 fiscal year, this will amount to \$7,300. To extend her contract until April 30, 2011 would require an further amount of \$3,250.

**Juanita Marois** - Mike G will use his (non-BALTA) release time to maintain her as portraiture RA and to support his writing until end of project.

**Travel/Meetings/Conferences** - One meeting of the team in the summer in Edmonton or Athabasca (cheaper we can use Mike G's place) would cost about

\$1000. Additional funds should be budgeted to get the researchers to the next BALTA symposium (total of \$2,000 in symposium budget). Some money to make conference presentations should be budgeted for the students and Lynda Ross (suggested \$2,000). Mike G has money.

## Appendix I

### Case Studies Resulting from the BALTA Survey Mapping Project

#### Coded and Using BALTA CS Format

Mountain Equipment Coop (Ponto/Gismond)

The Fraser Valley Centre for Social Enterprise. (Perry)

Alberta Environmental Network Society (Ponto/Gismond)

Edmonton Community Foundation (Ponto/Gismond)

Busy B Bargains (Ponto/Gismond- Update by Karsten's colleagues)

City Green Solutions Victoria (Ponto/Gismond)

Edmonton Bike Commuters (Ponto/Gismond)

Growing Food Security in Alberta (Ponto/Gismond)

Good Life Bike (Lee/Gismond/Keough)

Lite House Vancouver (Lee/Gismond/Keough)

Vastu Chair (Lee/Gismond/Keough)

CATCO Calgary's Car Sharing Coop (Lee/Gismond/Keough)

Alberta Wilderness Association ( Lee/Keough/Gismond)

Sunnyside Market ( Lee/Keough/Gismond)

Dairylane (Lee/Gismond/Keough)

Community Natural Foods (Lee/Gismond/Keough)

Babes in Arms (Lee/Gismond/Keough)

PlanNet Calgary ( Lee/Keough/Gismond)

Qualitative- Note Coded into BALTA Format

Serenity Funeral Service (Anielski- Not Coded or complete using survey data from Faith Survey)

Westlock Terminals (Cabaj et al. - not coded)

#### Other Potential Case Studies

- **Faith Based ? could be developed. (Bob M.)**
- **Farmer's Markets/FOOD NGOS? Mary and Paul and group?**
- **Conservation Land Trust Interviews (Mike/Sean/Lorelei)**
- Karsten's Podcast Studies