

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

SERC 2 WorkPlan – 2008-2009

General

1. SERC ID (i.e. which SERC it is):

SERC 2 – “The Social Economy in Rural Revitalization and Development

2. Has the workplan been ratified?

The workplan was ratified by SERC 1 on May 13, 2008 and by the steering committee on May 29.

3. Are there any changes being proposed to the current SERC membership:

SERC 2 proposes Hannah Whitman join as a participant collaborator. She is already working on a SSHRC project currently.

SERC 2 recommends de-listing Ann Dale, and potentially Chris Miewald, as BALTA members due to non-participation but will check with them first.

SERC 2 proposes that Karsten Mundel, Noel Keough and any other SERC member, if required by their project roles, be bumped up to co-investigator status.

3. Have there been any changes to the strategic vision and plans through to 2011 of the SERC since the 2007-2008 workplan (see Sections 6 and 7 of that workplan). If yes, please explain those changes.

SERC 2 narrowed down their topic areas of interest to **top priorities of research** within which to investigate the social economy in rural revitalization and development:

- o **Community Renewable Energy** – There are no projects this year but scoping is in progress for bringing forward to next year
- o **Food Systems**
- o **Land Trusts/Land Tenure**
- o **Forestry/NTFP and the other natural resources i.e. shellfish, aquaculture etc.** - In regards to focus, SERC 2 has decided to organize thematically instead of sectorally and this is now called Community Reinvestment in the Social Economy
- o **Rural SE Profiles with an emphasis on SERC 2 priorities** – looking at SE themes with relation to rural.
- o **Mapping the Neighbourhood and Small Community Social Economy**
- o **Sustainable Infrastructure for the Social Economy**

Detailed 2008-2009 WorkPlan

4. Overview of research priorities for 2008-2009 and a rationale for these in terms of the criteria for assessment of workplans (see workplans policy).

As implied in number 4 above, the research priorities are found within the 6 projects that are being proposed by this SERC:

- Rural Community Re-investment and the Social Economy
- Land Tenure and the Social Economy
- Mapping the Neighbourhood and Small Community Social Economy
- Social Economy Case Studies in Rural Alberta
- Farmers Market as Social and Economic Drivers of Local Food Systems
- Sustainable Infrastructure for the Social Economy

These research priorities meet the criteria outlined in BALTA.

Rural Community Re-investment and the Social Economy research project:

- Helps aid BALTA to better understand and critically analyze:
 - The impact of inserting social processes of reciprocity, solidarity, and sustainability into economic life; and
 - The social economy as it exists.
- Enables BALTA to leverage strategic benefits by:
 - Being directly relevant, even if only modestly, to addressing major cross-cutting trends and issues relevant to Canadians;
 - Leveraging current social economy assets and resources to scale up exemplary practices and stimulate social innovation.

Land Tenure and the Social Economy:

- Helps aid BALTA to better understand and critically analyze:
 - How territorial (CED) and social economy (enterprise) approaches as seen through land trusts can interact to enhance the overall potency of the social economy;
 - The social economy as it exists;
 - The characteristics of exemplary practice with land trusts wherever it occurs, ie. what is working and why; and
 - Key issues, opportunities, and constraints for adapting and scaling up what is working in B.C. and Alberta in regards to land trusts;
- Enables BALTA to leverage strategic benefits by:
 - Being directly relevant, even if only modestly, to addressing major cross-cutting trends and issues relevant to Canadians;
 - Leveraging current social economy assets and resources to scale up exemplary practices and stimulate social innovation

Mapping the Neighbourhood and Small Community Social Economy:

- Helps aid BALTA to better understand and critically analyze:
 - The social economy as it exists;
 - The impact of inserting social processes of reciprocity, solidarity, and sustainability into economic life;
 - How territorial (CED) and social economy (enterprise) approaches can interact to enhance the overall potency of the social economy;
 - The characteristics of exemplary practice wherever it occurs, ie. what is working and why;
- Enables BALTA to leverage strategic benefits by:
 - Leveraging current social economy assets and resources to scale up exemplary practices and stimulate social innovation;

Social Economy Case Studies in Rural Alberta:

- Helps aid BALTA to better understand and critically analyze:
 - The social economy as it exists;
 - The characteristics of exemplary practice wherever it occurs, ie. what is working and why;

- Enables BALTA to leverage strategic benefits by:
 - Contributing to the building of strategic relationships and alliances relevant to the central purpose of BALTA

Farmers Market as Social and Economic Drivers of Local Food Systems:

- Helps aid BALTA to better understand and critically analyze:
 - The impact of inserting social processes of reciprocity, solidarity, and sustainability into economic life;
 - How territorial (CED) and social economy (enterprise) approaches can interact to enhance the overall potency of the social economy;
 - The characteristics of exemplary practice wherever it occurs, ie. what is working and why;
 - Key issues, opportunities, and constraints for adapting and scaling up what is working in B.C. and Alberta;
- Enables BALTA to leverage strategic benefits by:
 - Being directly relevant, even if only modestly, to addressing major cross-cutting trends and issues relevant to Canadians;
 - Leveraging current social economy assets and resources to scale up exemplary practices and stimulate social innovation;

Sustainable Infrastructure for the Social Economy:

- Helps aid BALTA to better understand and critically analyze:
 - What are the scope and characteristics of exemplary practice in the region or elsewhere? What is working and why?;
 - What are the key issues, opportunities and constraints to scaling up what is working?;
 - Advances the application of exemplary practice knowledge in the region and scaling up of what works;
- Enables BALTA to leverage strategic benefits by:
 - Contributes to the design and development of social economy infrastructure and supports;
 - Has high potential for contributing to building alliances aimed at strengthening the social economy;
 - Is relevant to leveraging existing social economy assets for socio-economic innovation.

The six research projects adequately meet the following operational considerations:

1. The intended objectives, activities, outputs and outcomes are clear and reasonable;
2. The level of activity specified in the workplan and specific research proposals appear manageable;
3. There is a clear and appropriate division of roles and responsibilities to ensure that all activities are adequately managed;
4. Resource requirements are clear and appropriate. They are within BALTA's and the SERC members' capacity to provide. In some projects additional funding sources may be sought.
5. It is clear that all students involved in the proposed workplan will be managed in accord with BALTA's policy on student management and that there will be a clear benefit to all students in terms of learning as well as benefit to BALTA in terms of research results; and

5. Brief summary of each proposed research project/activity. Append project proposal for each project.

Project / Activity Description	Budget, Resources and Other Support Requested from BALTA	In-Kind and Cash Support Provided from Other Sources (where known)
B2 – 2007 – Sustainability and the Social Economy – continuation of research project from previous fiscal year	Student Salary: \$4,589 Knowledge Dissemination: \$130	

Project / Activity Description	Budget, Resources and Other Support Requested from BALTA	In-Kind and Cash Support Provided from Other Sources (where known)
B4 – 2008 - Social Economy Case Studies in Rural Alberta This project has the possibility to gather significant information about the social economy in several rural Albertan communities each year.	Researcher Release Time: \$10,000 Researcher Travel: \$2,000 Total Funding: \$12,000	Researcher support Costs: \$12,000 Equipment: \$10,000 Server: \$3,000 Conferences: \$2,000 Total: \$27,000
B5 – 2008 – Farmers’ Markets as Social and Economic Drivers of Local Food Systems The goal of this research is to examine and compare the current and potential role of farmers’ markets in BC and AB as social economy drivers for local food systems.	2008-2009 Student Salary: \$4,727 2009-2010 Student Salary: \$3,558 Student Travel: \$2,000 SERCs Travel: \$2,000 Research Support: \$300 Total Funding: \$12,585	Student: \$4,100 Student Travel: \$2,000 BALTA Travel: \$4,000 Incidentals: \$300 Total: \$10,400
D5 – 2008 - Rural Community Re-investment and the Social Economy <i>Details of project are still in development with SERC 3</i>	Cost shared with SERC 3 Student Salary: \$4,880 (\$610 in 2009-2010) Student Travel/Expenses: \$900 SERCs Travel: \$1,125 Research Support: 100 Total Funding: \$7,005	N/A
D3 – 2008 - Land Tenure and the Social Economy Proposes to examine the range and scale of shared equity land tenure models being used across various sub-sectors of the social economy	Cost shared with SERCs 1 and 3 Student Salary: \$4,975 Research Support Costs: \$250 Knowledge Dissemination: \$500 Student Travel: \$1,000 Total Funding: \$6,725	N/A
E3 – 2008 - Mapping the Neighbourhood and Small Community Social Economy	Funded from Mapping Student Salary: \$6,630 (\$1,105 in 2009-2010) Research Support Costs: \$150 Student Travel: \$1,000 Total Funding: \$7,780	Research Costs: \$200 Travel: \$1,000 Total: \$1,200
D4 – 2008 - Sustainable Infrastructure for the Social Economy The purpose of this research project is to examine cluster-based social enterprise models as a mechanism for developing sustainable infrastructure for the social economy, and to determine their effectiveness in enhancing organizational performance and social innovation.	Cost shared with SERC 3 Student Salary: \$6,630 (\$829 in 2009-2010) Total Funding: \$6,630	Jorge Sousa, in-kind – 15 days @ \$800 = \$12,000 Mark Roseland in-kind – 15 days @ \$800= \$12,000 Total: \$24,000

Project / Activity Description	Budget, Resources and Other Support Requested from BALTA	In-Kind and Cash Support Provided from Other Sources (where known)
Total Budget Requested from BALTA	<p>Total SERC 2: 2008-2009: \$40,367 2009-2010: \$9,297</p> <p>Student Costs: 2008-2009 - \$24,362 2009-2010 - \$4,997</p> <p>Release Time: \$10,000</p> <p>Research Dissemination: \$630</p> <p>Research Support Costs: 2008-2009 - \$350 2009-2010 - \$300</p> <p>Student Travel: 2008-2009 - \$1,900 2009-2010 - \$2,000</p> <p>SERCs Travel: 2008-2009 - \$3,125 2009-2010 - \$2,000</p>	<p>Total: \$62,600</p>

6. Identification of research and activity roles for those SERC members involved in research, including projects and activities identified under #7. Include which SERC members will lead and/or be involved with each project/activity.

Project / Activity	SERC Members Involved	Role Played
Rural Community Re-investment and the Social Economy	Sean Markey Mark Roseland	Lead Researcher Co-Researcher
Land Tenure and the Social Economy	Mark Roseland Mike Gismondi	Co-Lead Co-Lead
Mapping the Neighbourhood and Small Community Social Economy	Mike Gismondi Noel Keough	Co-Lead Co-Lead
Social Economy Case Studies in Rural Alberta	Karsten Mundel	Lead Researcher
Farmers Market as Social and Economic Drivers of Local Food Systems	Paul Cabaj Mary Beckie Hannah Wittman	Co-Lead – Alberta Co-Lead – Alberta Co-Lead - BC
Sustainable Infrastructure for the Social Economy	Mark Roseland	Co-Lead - BC

7. In any projects where SERC members will not be responsible for managing the project, identify how project leads for those projects will be arranged to ensure that such projects meet the priorities and research needs of the SERC.

Not relevant.

8. Explanation of any communication, dissemination and learning/animation plans/needs during the year, beyond those elements already identified in individual project proposals. What support would be needed from BALTA to assist with this?

There are no resource needs required at this time from BALTA for this upcoming year as this SERC is still building its body of material that will in future years contribute to a larger published product. In the meantime the SERC will be considering their larger publishing strategy and continuing their discussion around a SERC book, the discussion which will be picked up in the fall.

For this upcoming year, SERC 2 will continue to use the BALTA newsletter to disseminate the efforts in research that are underway and have recently been completed.

Individual SERC members also continue to use their own institutional communication tools to disseminate and communicate BALTA and SERC 2 research activities.

This SERC would like to ensure that BALTA ensures there is time and/or a committee that focuses on this element in this year. At the symposium time should be made available to address both academic publishing needs and practitioner publishing needs.

9. General plan for monitoring and evaluation of the research activities of the SERC. (Specific arrangements for individual projects should be described in each project proposal. This workplan section should speak to how the SERC intends to monitor and evaluate its overall progress.)

Detailed monitoring and evaluation plans for each project will be discussed and developed with the lead researchers for each project prior to commencing research activities; student research assistants will also be made aware of M & E requirements when they begin their work. In general, the approach followed will be consistent with the approach being proposed for the other SERCs as outlined below.

Monitoring and evaluation will address both evaluation of the research projects and project results as well as evaluation of the students' performance, student learning and potential impact on the students and their future careers. It is assumed that this will include a mix of written and other reporting, as outlined in BALTA's emerging approach to monitoring and evaluation. A specific plan and tools will be worked out with BALTA's evaluation coordinator, but will include such elements as:

- a. Written final reports on each project;
- b. Written interim reports near fiscal year-end for projects extending beyond the year-end;
- c. Written evaluations for each student employed, both self-assessments and supervisor assessments;
- d. Some follow-up evaluation interviews and focus group sessions to explore other evaluation aspects;
- e. Some form of collective evaluation by the SERC of research results, SERC functioning, etc.