

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

Annex A – Project C4-2007

A. Project Title

Preliminary Profile of the Size and Scope of the Social Economy in Alberta and British Columbia

B. Brief description of project and project objectives, outputs and proposed outcomes

The purpose of project is to identify, review and analyze existing data with the objective of developing a preliminary profile of the Social Economy within Alberta and British Columbia. The profile will be comprised of aggregate and separate data of the size and scope of the Social Economy, including: how many people are employed within the Social Economy; major activities; and breadth of activities according to industry classification (NAICS).

The project will begin in March 2007 and end August 31, 2007. The following table lists the tasks/stages and approximate dates involved in completing this project.

Tasks/Stages	Date
1. Identify data sources; develop dimensions and study parameters; and train student researcher	March to April 2007
2. Collect and consolidate information into a profile	April to July 2007
3. Produce final outputs, including final report	August 2007

Project objectives

- Develop a profile of the Social Economy by identifying and organizing existing data (both aggregate and separate) in Alberta and British Columbia;
- Analyze existing data available through Social Economy networks, government (e.g. StatsCan) and non-government agencies (e.g. Imagine Canada, United Way);
- Assess the usefulness of existing data sources to understand the size and scope of the Social Economy;
- If applicable, identify significant gaps in existing data or availability of data;
- Highlight where findings and issues may warrant further exploration; and
- Present findings to be used for other BALTA priorities and for advocacy purposes.

Outputs

- A research report outlining a preliminary profile of the Social Economy within Alberta and British Columbia;
- Where possible, present the data in both aggregate and separate formats; and
- Provide recommendations concerning the effective usage of the collected data to depict the size and scope of the Social Economy in Alberta and British Columbia.

Outcomes

- A preliminary profile of the Social Economy in Alberta and British Columbia;
- A profile that can be used immediately by CED and Social Economy networks in Alberta and British Columbia;
- Consolidation of basic and coherently organized data illustrating the size and scope of activities involved in creating a strong Social Economy; and
- Identify insights, leads and contacts relevant to the BALTA mapping project and aspects of the BALTA research agenda.

C. Purpose and significance of the study, including congruence of the proposed research with the over-all strategic research objectives identified for the SERC and BALTA

Recognizing the presence and significance of the Social Economy in Alberta and British Columbia has been largely based on anecdotal accounts, government reports, and non-government research and reports. In the current policy context and development of BALTA's research priorities, members and partners of BALTA have identified the urgent need to have some basic and coherent data backing up the importance of the Social Economy in Alberta and British Columbia. For instance, individuals have highlighted the usefulness of gathering basic employment data for the purposes of engaging with decision makers in government.

The objective of this study is to begin to formally recognize the size and scope of the Social Economy in Alberta and British Columbia by creating a preliminary profile. Organizations that form the Social Economy¹ foster a greater measure of solidarity among human beings, their communities and society as a whole by emphasizing the social purposes of mutuality and collective benefit. Specifically, these organizations and activities place higher priority on mutuality, accountability to the public or a defined membership, self-help, caring for people and the environment.

For the purposes of this study, the Social Economy is operationalized as encompassing the range of ways people exchange goods and services (often based on the principle of reciprocity) with each other and distribute profit as surpluses through various mechanisms, including: the family or household economy; local volunteer activities and opportunities; and the wide range of more formally structured organizations, (such as charities or member based associations) that explicitly pursue social goals using business oriented approaches.

The profile of the Social Economy will include a variety of variables, including: number of employees; size of budgets; types of activities or services; and industry classification. The profile will be based on aggregate and separate data from a wide variety of sources, including: research reports; StatsCan; government and non-government agencies. The profile is intended to be used immediately by CED and Social Economy networks (e.g. non-profits, co-operatives and credit unions) for

¹ This description of the Social Economy is paraphrased from the Mike Lewis (August, 2006) discussion paper "Mapping the Social Economy in B.C. and Alberta: Towards a Strategic Approach."

advocacy and planning purposes. Additionally, the profile can be used as a spring board for developing other research projects and priorities. This project forms part of the goals of BALTA and SERC 3 to undertake an analysis and evaluation of the Social Economy infrastructure in a Canadian context. Moreover, this project has been highlighted as approved on the SERC 3 work plan.

D. Will this project be led and managed by a SERC member or members or will it require a request for proposals?

The project will be lead and managed by Jorge Sousa, a SERC 1 member, on behalf of SERC 3. Other SERC members will be encouraged to provide input to the project.

E. Lead researcher, organization name and contact information

Jorge Sousa, Assistant Professor, University of Alberta, Department of Educational Policy Studies
Tel: (780) 492-4905
sousa@ualberta.ca

F. Names of other researchers and organizations involved

SERC 3 members will provide input to the project. SERC 1 and SERC 2 members will also be invited to provide input at the feedback stage. The lead researcher and student assistant will liaise with Mike Gismondi to avoid significant overlap with the mapping study, and to ensure that effective information sharing and coordination occurs with respect to contacting relevant organizations

G. Will the project involve hiring one or more student researchers? Will they need to be recruited or have they already been identified?

The project will commence by working with the lead researcher's current graduate student research assistant, which will be funded by the Department of Educational Policy Studies at the University of Alberta. A new student researcher(s) will be recruited and hired in May for the duration of the project. As this is a short term project it is desirable to hire a student within the University of Alberta. There is a greater advantage to hiring a local student because of access to departmental in-kind support, and the student can be more fully supervised and mentored by the lead researcher. This has been approved by the BALTA Steering Committee.

H. Brief description of project roles and responsibilities for project participants (lead researcher, other researchers, student researchers, partner organizations).

The lead researcher will oversee student researcher recruitment, develop project parameters, supervise student researcher, ensure budget compliance and assess and monitor work of student researcher.

The student researcher will work with the lead researcher to identify and collect appropriate data to develop a general profile of the Social Economy. The student will provide background documents and contribute to the data analysis for the final report.

The lead researcher will collaborate with the student researcher to complete the final research report. The report will consist of a preliminary description of the Social

Economy within Alberta and BC, and a description of the data collected. Although much of the writing will be done by the lead researcher, the student will contribute to the writing and presentation of the findings.

I. Indicative Budget

Category	Requested of BALTA	In-kind Contributions
Student salaries & benefits	\$3,464 (May to August) - \$17/hour (\$3,120 and 11% (\$344) mandatory benefits;	\$2,000 (March – April) from the Department of Educational Policy Studies of the University of Alberta
Researcher Time		\$11,200 (14 days @ \$800/day) – Project supervision, management, and write-up.
Research Support Costs	\$900 – supplies, printing, copying, long-distance telephone, local travel	\$600 - Computer, office space with telephone line for student, supplies, admin support, and software licenses (as required)
Knowledge Dissemination	BALTA to facilitate the dissemination of research findings and report to relevant groups, including the three SERCs.	
Travel	Travel to BALTA meetings where necessary	
TOTALS	\$4,364	\$13,800