

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

Annex A – Project C9-2007

A. Project Title

CED and Social Economy Policy Inventory in B.C. and Alberta (Phase One)

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

The time frame for this project is from August 2007 to the end of August 2008. However, the work on policy outlined in this annex is conceived of as a first phase in an ongoing project that will extend beyond one year. In developing and implementing an inventory of federal and provincial legislation, policies, programs and initiatives relevant to CED and the social economy in Alberta and B.C., it will:

- build on the BALTA mapping paper;
- take into account the existing CCEDNet policy inventory;
- take into account the work done or under way in other nodes in the Canadian Social Economy Research Partnership;
- take into account the relevant Quebec and Manitoba provincial policies; and
- take into account the current codification of exemplary practices in CED and the social economy.

Objectives

1. To design a classification framework to guide the planning of the policy inventory and the analysis of the results.
2. To use the framework to design the inventory.
3. To conduct an inventory of federal and provincial legislation, policies, programs and initiatives in B.C. and Alberta that are directly relevant to CED and the social economy.
4. To analyze the results based on the classification framework.

Outputs

1. A classification framework relevant to policy research in the fields of CED and the social economy.
2. An inventory of federal and provincial legislation, policy , programs and initiatives directly relevant to CED and the social economy

Outcomes

1. A basis for gap analysis in the B.C. and Alberta contexts.
2. A basis for comparative research with other jurisdictions.
3. Greater potential for targeting policy development efforts more strategically.

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

Based on current knowledge of advances that have been made over the last 20 years in CED and the social economy, in Canada and in other jurisdictions, the importance of enabling legislation, policy and programs is evident (Quebec, Manitoba, Nova Scotia, Belgium, Brazil, Spain, Italy, Britain). The range, scale and durability of impacts appears to be significantly enhanced where the architecture of public policy is strategic and supportive. Beginning in 2004 CCEDNet, the Chantier and the CCA made some modest progress in advancing a federal policy agenda that took into account this learning, progress that was reversed by the present government.

Other than the CCEDNet inventory of 4 years ago, there has been no attempt to do a systematic inventory of current policies. Doing an update is thus timely. However, it is important to note that what is being proposed is not a mere update of what exists. Central to this work is the design of a classification system codified from practice, rooted in exemplary practices, and taking into account what we know about policy in jurisdictions where CED and the social economy have been demonstrably strengthened. Thus, the inventory will be guided by a much sharper yet nuanced focus and be better equipped to provide data useful for serious analytical attention. The results will thus be relevant not only to the field in B.C. and Alberta. The classification and analytical frameworks will be useful to the field more generally.

It is anticipated that results achieved by this first phase will feed into the definition of other policy projects, some of which may be directly related to the SERC 3 mandate and others that may flow from the work of SERC 1 or 2. It is also anticipated that review of our results and comparison with other nodes may yield joint initiatives. Thus further stages of this research priority are not pre-defined at this juncture

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 led by SERC 3 member and co-investigator, Jorge Sousa. Mike Lewis as BALTA lead investigator will participate at the design and analytical stages but will not lead the project.

E. Lead researcher, organization name and contact information

Jorge Sousa, Assistant Professor, University of Alberta, Department of Educational Policy Studies
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sousa@ualberta.ca

F. Names of other researchers and organizations involved

In terms of consultation with other work underway, we will be seeking collaboration from the following people:

1. Dr. Jean-Marc Fontan, a collaborator in BALTA and lead investigator in the Quebec node.
2. Dr. John Loxley, University of Manitoba, Dept of Economics, who is working with Dr. Fontan on a policy project that examines how CED connects to the larger social economy policy structure in Quebec and how the resulting analysis compares with the current policy infrastructure in Manitoba. This is being done to better inform how the next generation of policy advocacy to the Manitoba Cabinet might be effectively framed.
3. Brendan Reimer, CCEDNet support staff on the Prairies and co-lead on the Sask-Manitoba-NW Ontario SE node policy cluster. He is supervising a student who will be undertaking the policy inventory work in Manitoba. Lastly, he is the designated drafter of a Cabinet policy advocacy paper for the Manitoba CED network.
4. Rupert Downing – Executive Director of CCEDNet, a partner in BALTA

A key point of collaboration and consultation will be around what can be learned from their work that feeds into the classification framework.

It is anticipated that the project would draw on the expertise of relevant people within the BALTA membership, including Dianne Kelderman, Margie Mendell, Nancy Neamtan, David Lepage and John Restakis to name a few.

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

This project will require the employment of student research assistants (Master's level) in both provinces. It is proposed that a senior student research assistant be hired to participate in the design and implementation phases and that this student would be offered a longer term contract involving further work in this area and thus project continuity as SERC 3's research on policy areas continues into a subsequent year. This student would be Edmonton based to work closely with the project lead, Dr. Sousa. It is proposed that the second student be hired as a junior research assistant for a shorter period of a few months to implement the project in B.C.

Jorge Sousa as lead wants to provide in-person supervisory support to the senior student. It is proposed that an open competition be held in Edmonton based universities for the senior student researcher. This would include the policy oriented graduate students in Jorge's faculty. If strong candidates emerge from this faculty that appear as competent as other candidates, consideration will be given to choosing him/her as it will come with 50% funding of the student researcher's time.

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

The lead researcher (or co-leads) will provide direct supervision of both students.

The lead investigator, Mike Lewis, will provide direct input at the design and analytical stages of the project, in particular around design and application of the classification system. A draft working paper will be produced by Mike Lewis as a point of departure.

This will be done by September 2007. Where necessary, he will also help facilitate consultation with other BALTA collaborators and other key people identified earlier who are doing similar work.

The senior student will be involved from the design stage (once draft working paper is done) and in all aspects of the inventory work in her/his province. This person will be brought in as of September 1st, requiring earlier recruitment. The senior student would also be involved in the analysis and synthesis stages of this phase one project.

The junior student would be recruited in advance for the January-May 2008 period and would implement the inventory work in her/his province.

I. Indicative Budget

This project will overlap two fiscal years. The budget for the 2007-2008 year is in the table below. Estimated costs for the following fiscal year for the two students are:

Senior Student \$5,200 (April-August 2008)
 Junior Student \$1,040 (April 2008)

See next page for detailed 2007-2008 budget.

Category	Requested of BALTA	Other Contributions
Student salaries & benefits	Senior student – 7 months \$7,280 (\$19/hour) September-March Junior student – 3 months \$3,120 (\$17/hour) January-March	If a student from U of A Education Policy Department wins the competition - \$3,640 would be contributed. This would reduce costs by an equal amount for BALTA.
Researcher Release Time	Lewis – 6 days of already budgeted salary replacement	Lewis – 6 days in-kind = \$3,000 Jorge Sousa if lead – 10 days @ \$800 = \$8,000
Research Support Costs	\$1,000 – meeting costs in October 2007 (see below) \$500 – for research support costs (phone, supplies, etc.)	
Travel	\$500 – one trip to Edmonton for M. Lewis to meet in person with J. Sousa & senior student \$500 – for senior student to attend BALTA symposia & classification meeting	
TOTALS	\$12,900	\$11,000 +

NB: Research Support Costs - \$1,000 for meeting costs – This is for a special meeting on classification of key collaborators identified in Section F. The meeting would piggy-back with the CIRIEC conference and BALTA symposium in October 2007, so only the added day's costs, not travel costs, would be required.