

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

SERC 3 Project Proposal – 2008-2009 Program Year

A. Title of project: C-14 - Leadership in the Community Sector: Understanding the Challenges, Competencies and Needs of Practitioners in the Social Economy

B. With which BALTA SERC Is this project associated? Or is it a cross cutting project?

This project is being supported by SERC 3 - Analysis, Evaluation and Infrastructure Development. However, interest in and support for this initiative has previously also been expressed by both the BALTA steering committee and SERC 1 (Social Enterprises in Human Services and Affordable Housing).

C. Lead researchers, organization names and contact information:

Academic Co-Lead and Student Supervisor: Lynne Siemens, Assistant Professor, School of Public Administration, University of Victoria
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Practitioner Co-Lead: Mike Lewis, Managing Director. Canadian Centre for Community Renewal
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The University of Victoria has had an existing connection with BALTA since BALTA's inception through BALTA collaborator, Ian MacPherson, and the B.C. Institute for Co-operative Studies. Ian and BCICS are also involved with this project (see next section).

D. Names of other researchers and organizations involved:

This research project is part of a broader initiative (see next section) under the joint direction of a steering group consisting of the lead researchers and the following individuals: John Restakis, Executive Director of the BC Co-operative Association; Ian MacPherson, Director of the BC Institute for Co-operative Studies; Ellie Langford Parks, Program Manager of the Centre for Non-Profit Management; and Evert Lindquist, Professor and Director of the School of Public Administration at UVic.

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

This research project is associated with a broader initiative, to explore the development of a MA in Community Development program at the University of Victoria. This initiative involves BALTA lead investigator, Mike Lewis, and other BALTA members (John Restakis of the BC Co-operative Association and Ian MacPherson of the BC Institute for Co-operative Studies. In addition to the broader involvement of these BALTA members in the program exploration and potential program development, it is proposed that BALTA support this related research

project to explore specific educational and leadership development needs of the social economy practitioner community.

Project Objectives

- The primary objective of this project is to gain a greater understanding of the needs and challenges that practitioners face in the community sector and to determine what competencies are needed for effective leadership in these organizations.

Outputs

The key deliverables for this project are as follows:

- A literature review of terminology attempting to capture a diverse ecology of organizations in the non-government and not-for-profit sectors (e.g., civil society, the social economy, the third sector, the voluntary sector, fourth sector, etc.) and different organizing approaches (e.g., community economic development, co-operative movement, non-profit sector, etc.) dedicated to increasing the capacity of communities. This review will help outline the differences and similarities between different organizing approaches and will provide a base for the following second deliverable.
- Assessment of the challenges, needs, and competencies required of practitioners in the community sector (including non-profit organizations, co-operatives and other actors in community development) based on a review of literature and other documents (e.g. reports and other feasibility studies), as well as interviews, focus groups and possibly a survey.

Intended Outcomes

- A greater understanding of the terminology used in community sector organizations. This will help determine a common framework between different organizational forms within the community sector.
- Increased knowledge of best practice in community sector education and training.
- This paper will provide a base for discussion on how to best develop leaders in the community sector.

F. 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.]

The Community Economic Development sector constitutes a large and diverse part of the Canadian economy and is an important means for innovation and strengthening the fabric of communities. Understanding the challenges, competencies and needs of communities is vital to strengthen and expand the CED sector. There are several inter-related trends that have emerged, whose implications on communities will be examined in this research project.

- In recent years, governments have downsized core public service operations, experimented with alternative ways to deliver services, and have off-loaded many services from governments to communities and individuals. As these community organizations take on more responsibility, they require better governance, leadership, analytic and management capacities.
- Like organizations in the public and for-profit sector, community organizations are confronted with a huge demographic and succession challenge. The learning needs of future community leaders must be identified as the “boomer” generation retires so that the new generation can be well-prepared and well-trained to work in highly entrepreneurial, innovative and effective ways.
- There are significant challenges with respect to mitigating and adapting to climate change, seeking new sources of energy, and related food and water security issues. These will have profound implications for communities as they organize themselves to handle the associated economic restructuring and social consequences.

Understanding the challenges facing the community sector is necessary to determine what competencies and learning needs are required from leaders tasked with strengthening communities and developing the community sector. Two of the key priorities for the SERC 3 strategic vision are to *Understand the Development System*, including human resources development, and *Leadership Formation*. This research project intends to develop a better understanding of the needs and opportunities facing community organizations and how to best leverage human resources and leadership in order to scale up best practices and stimulate social innovation. This project proposes to find a common framework that unites organizations in the CED, Co-operative and Non Profit and Voluntary sectors and to support a cross-fertilization of ideas and practices between the sectors. As part of the broader initiative, exploring the development of an MA in Community Development, this project will help determine the feasibility of developing a vehicle through the University of Victoria aimed at developing leaders and to share exemplary practice in community sector organizations.

G. 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.

There will be one student researcher, who has already been identified. Matt Broadbent is a Master’s of Public Administration student at UVic and is located within the offices of the Centre for Non-Profit Management (CNPM) at the University of Victoria. His office will be in the Human and Social Development building (HSD), room A379 and he can be contacted at broadbmj@uvic.ca or 250-721-6446.

The student researcher will review appropriate literature on the social economy and will examine social economy development programs in Canada and beyond. He will work with BALTA and the steering committee members to devise interview questions, focus group topics and potentially a survey for current and future practitioners in the social economy and will also be responsible for the coordination of meetings, preparing materials and any other responsibilities as required.

The student will gain valuable research experience through both secondary methods, by reviewing literature and examining relevant academic programs, and through primary means from interviews, focus groups and survey design and analysis. Furthermore, as a student in Public Administration, this student will be exposed to the diverse range of organizations within the community sector and will examine the characteristics and competencies that are necessary for effective leadership and organizational management within the social economy.

H. Research activities, plan of work and timetable:

Timeline: Some initial preparatory work for this research will take place in June, but the principle focus of research, for which the student will receive payment from BALTA, will be in July-Mid-September. The project will be completed by September 30.

In order to meet the required deliverables, a three phased research approach would be necessary. In order of delivery, it would include:

Phase 1 - Literature Review

The first stage of research would be a literature review into the composition of the community sector in British Columbia, Canada, and beyond, and the relationships between these organizations and the public and private sector. First, differing terminologies aimed at classifying organizations in the community sector (e.g. social economy, civil society, third sector, etc.) will be defined and contrasted against each other. Next, the different elements of the community sector (community economic development, cooperatives, non-profits and volunteer organizations, etc.) will be analyzed individually, and their roles will also be analyzed as a collective unit in communities and in the general economy.

Phase 2 – Information gathering from practitioners in the community sector

Interviews and focus groups directed at leaders in the social economy will be performed as a means to determine the needs, challenges and competencies required of leaders in this sector. Interviewees and focus group participants could be identified through the literature review and by the steering committee.

Phase 3 - Survey of current and future practitioners

A survey may be valuable in assessing the interests and learning needs of developing or future practitioners in the community sector. The survey could be directed towards a combination of both current practitioners in the community sector and towards current undergraduate students in related fields. Survey recipients could be identified by the steering committee.

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.

The final paper will be available to the academic community and will be communicated to BALTA members and the other members of the steering committee. BALTA will post the report on its website. The report may also be of interest to academics in other Canadian Social Economy Research Partnerships nodes across the country, not just within BALTA.

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).

See previous section. Once the report has been received, BALTA will also explore whether there is interest in distributing the report within some practitioner networks.

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.)

Research activity will be monitored by Mike Lewis, Director and Lead investigator of BALTA, throughout the research process. There will be monthly steering committee update meetings beginning June 11th and prepared materials will be reviewed as the process moves forward. BALTA’s required project final evaluation report will be submitted. The BALTA student and supervisor evaluation reports will also be completed by Matt and Lynne.

**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.**

The research tools to be used for this project are currently under development. It is expected that interviews, focus group and perhaps a survey will be used. The research tools will be approved by BALTA and the steering group once developed. Both the BALTA ethical review process (administered by Royal Roads University) and the UVic ethical review process will be followed.

M. Budget and Contributions

Category	Requested of BALTA	Other Contributions
Student salaries	\$3,000.00	<ul style="list-style-type: none"> • BC Co-operative Association (\$2000) • Centre for Non Profit Management (\$3000)

		<ul style="list-style-type: none"> • BC Institute for Co-operative Studies • University of Victoria School of Public Administration (In-kind support – office space and overhead)
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)	\$315.00	
Researcher Release Time		
Research Support Costs (e.g. supplies, communication costs)		
Knowledge Dissemination		
Travel	\$600.00 – Two Focus Groups Sessions in Vancouver	
TOTALS	\$3,915.00	