

BC-Alberta Social Economy Research Alliance (BALTA)

Policy for Adding New Partners and Participants to the BALTA Scaling Innovation for Sustainability Project

Context and Staging of Additions

We already have a large group of participants in the project and limited resources to support their participation. In the short term of our Partnership Development Project phase, additions must be limited and highly strategic. There may be room for further additions later in the process. There are thus three stages where additions may make sense:

- During the PDG Project – Partners & participants who can make a strategic immediate contribution to developing our project and partnership.
- During the SSHRC Application – Partners & participants who can be of value if we obtain a SSHRC research partnership grant and who could enhance the credibility of our SSHRC funding application, but who aren't immediately necessary for developing the project.
- Longer Term – Partners & participants that we would consider adding if we actually obtain longer term SSHRC funding for the partnership project.

Protocol for Considering and Approaching New Partners and Participants

1. Members of the steering committee (SC) can engage in exploratory discussions with potential new partners and participants without seeking prior SC approval, but should ensure that such discussions are clearly exploratory and do not involve making commitments until the proposed new partner/participant has been approved by the steering committee.
2. Because even exploratory discussions can raise expectations, as much as possible SC members will discuss a potential new partner/participant with the SC before making an approach. This can even be done via an email to SC members if action needs to take place before the next SC meeting takes place.
3. Once a SC member has a recommendation re addition of a new partner/participant, that recommendation should be brought to the SC for approval. The recommendation should include what the new partner/participant would bring to the partnership and how the addition would meet the criteria. It should also address whether the person needs to be added immediately for strategic purposes or should be considered for addition at a later stage in the partnership development (see first section).
4. Once approved, the relevant SC member and/or the BALTA coordinator will follow up with the organization/individual to confirm the relationship. The coordinator will then follow up with the organization/individual and SSHRC to get that organization/person added to the grant.

Criteria for Making Decisions on New Partners and Participants

1. Does the person/organization bring expertise that fills an important gap in our current partnership team – e.g. content, policy development experience, etc.?
2. Does the person/organization bring a significant added capacity, e.g. in knowledge mobilization, that would strategically and significantly increase our capacity?
3. Does the organization/person represent a constituency whose presence in our partnership would strategically and significantly increase our credibility, e.g. with SSHRC and other funders, but also with target constituencies for our work?
4. Does the person/organization address gaps or imbalances in our partnership?
 - a. Geographic – provincial, north-south, rural, urban
 - b. Practitioner/.academic balance
 - c. Gender
 - d. Ethnicity, including Aboriginal representation, francophone participation, etc.
5. Does the person/organization support a transformative approach and perspective with regards to transition that is compatible with the BALTA approach and partnership?
6. Does the person/organization have the time to commit to contributing to the BALTA partnership at an appropriate level of engagement?
7. Does the organization bring additional resources to the project/partnership that can be of significant benefit?