

Fiche de renseignements sur l'économie sociale

Social Economy Fact Sheet

Project Title:	A1-2007 Innovative Use of Housing Co-operative Assets
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Housing; Finance
Keywords:	Social economy; co-ops; housing; finance; collective ownership; property rights, BALTA
Academic Researchers:	Rebecca Pearson (Sauder School of Business-University of BC)
Community Partners:	Carol Murray (Same Page Strategies)
Contact:	Carol Murray, spstrategies@telus.net
End Date:	2008
Deliverables:	Research report; presentation
Project Description:	Between 1969 and 1993, approximately 82,000 affordable housing units were created across Canada through federal and provincial support of housing co-operatives. This generation of housing co-ops is beginning to pay off their mortgages, meaning that each co-op will own its valuable property outright. The original objective of this study was to investigate the potential for leveraging (or re-mortgaging) these assets to provide capital for the creation of new housing, strengthening the existing sector and/or other social economy purposes. Upon investigation, it was found that the sector faces other challenges which make such an approach unlikely. The research paper identifies these challenges and some possible strategies for addressing them.



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Social Economy Fact Sheet

Project Title:	A2-2007 Co-operative Models of Social Care
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Human Services
Keywords:	Co-ops; human services; social care; elder care; public policy; tax; legislation, BALTA
Community Partners:	John Restakis (BC Co-operative Association);
Contact:	restakis@bccca.coop
End Date:	2008 for research and reports; book to be published in 2010
Deliverables:	Research reports; research paper; book
Project Description:	This project examines the role that co-operatives are playing in the provision of health and social services in Canada and internationally, and the impact of government policy, legislation, and operating procedure on the ability of co-operative models to provide these services. The overall thrust of the research is to explore the potential for the social economy as a consumer controlled and community level alternative to the prevailing models of health and social services supplied either by government or the private sector.



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Social Economy Fact Sheet

Project Title:	A3-2007 The Social Purpose Capital Market in B.C. and Alberta
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Finance
Keywords:	Social economy; BALTA; financing; social purpose; capital markets
Academic Researchers:	Rebecca Pearson (Sauder School of Business-University of BC)
Community Partners:	Jenny Kain, City of Edmonton; Martin Garber Conrad (Edmonton Community Foundation) Rebecca Pearson (VanCity Capital Corporation)
Contact:	martin@ecfoundation.org
End Date:	2009
Deliverables:	Conference paper
Project Description:	<p>The social economy has grown significantly over the last few years as a result of decreased government funding and an emphasis on diversification of revenue. There has been an increase in the number of social economy organizations including social enterprises, non-profit corporations and innovative hybrid organizations. Social economy organizations require different types of capital at various stages of development and the resources available and potentially available to the non-profit sector form a distinct capital market. This research provides analysis of non-profit sector capital market development in B.C. and Alberta and opportunities to use these resources in innovative ways to support the growth and transformation of the social economy sector.</p>



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Social Economy Fact Sheet

Project Title:	A4-2007 Role of Faith Based Organizations in the Social Economy (2-Phase Project – See also A10)
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; religious organizations; BALTA
Academic Researchers:	Bob McKeon (St. Joseph's Theological College)
Community Partners:	Martin Garber Conrad (Edmonton Community Foundation)
Contact:	martin@ecfoundation.org
End Date:	May 2009
Deliverables:	Conference paper and input into BALTA's mapping program
Project Description:	The history of the social economy in Canada shows significant faith community engagement. This continues to the present day. This project documented the role faith-based organizations play in the social economy in Alberta and B.C. and investigated ways in which this role can be strengthened and expanded in the future.



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Social Economy Fact Sheet

Project Title:	A5 – 2008 -Affordable Housing Assessment and Strategic Planning, Kootenay Region
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Housing
Keywords:	Social economy; BALTA; affordable housing; Kootenay Region
Academic Researchers:	George Penfold (Selkirk College)
Community Partners:	Tim Pringle (Real Estate Foundation of British Columbia) Columbia Basin Trust
Contact:	martin@ecfoundation.org
End Date:	(Phase 1 end date: June 2008, Phase 2: March 2009)
Deliverables:	Reports, conference presentations, journal article,
Project Description:	This project looked at affordable housing in the Kootenay Region of British Columbia, Canada. The project includes both an affordable housing assessment phase and support to strategic planning on future affordable housing development.



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Social Economy Fact Sheet

Project Title:	A6 -2009 - The Fraser Valley social economy with reference to affordable housing provision and related support services
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; housing
Keywords:	social economy; BALTA; housing; affordable housing; Upper Fraser Valley
Academic Researchers:	Anita van Wyk, Social Work, University of the Fraser Valley
Community Partners:	Ron van Wyk, Mennonite Central Committee of British Columbia; Sherril Guthrie, Cuthrie Consulting; Stacey Corriveau, BC Centre for Social Enterprise
Contact:	
End Date:	Mid-2010
Deliverables:	Literature review; housing and support services inventory; report; conference presentations; journal articles; input into BALTA's mapping program
Project Description:	This research project provides a portrait of the nature, dynamics and extent of the social economy in the Fraser Valley, specifically with regard to the provisioning of affordable housing and concomitant support services.



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Social Economy Fact Sheet

Project Title:	A7-2009 – Co-op Housing Futures: A Spatial Design Research Approach
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Housing
Keywords:	Social economy; housing; co-op housing, BALTA
Academic Researchers:	Noel Keough, University of Calgary Faculty of Environmental Design
Community Partners:	Sunnyhill Housing Co-operative
Contact:	
End Date:	Mid-2010
Deliverables:	Design report; conference paper; documenting of the process for possible replication elsewhere.
Project Description:	<p>The project used a design methodology to explore possible futures for the Sunnyhill Housing Cooperative in Calgary. A team of graduate design students, with skills in architecture, urban design, planning and industrial design worked with the co-op to produce alternative physical designs for the renovation or reconfiguration of the existing co-op. The project tested the hypothesis that engaging co-op members in a design based visioning process can provide the catalyst for creative re-investment in green renovation and/or new and green affordable housing construction, and can advance the incorporation of social enterprise into the co-op housing model. Given that municipal government support and policy is crucial for innovation in housing design, the project also identified barriers and opportunities for municipal government support for sustainable co-operative housing retrofit and new construction.</p>



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Social Economy Fact Sheet

Project Title:	A8-2009 – Creating a Database of Social Enterprise Capital Providers in BC and Alberta
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; Finance
Keywords:	Social economy; BALTA; finance; venture capital; social enterprise
Academic Researchers:	Joanna Buczkowska and Amanda Polak (Sauder School of Business, UBC)
Community Partners:	Rebecca Pearson & Emily Beam (VanCity Capital Corp.)
Contact:	
End Date:	Mid-2010
Deliverables:	Report; online database; input into BALTA mapping program.
Project Description:	The project is surveying and documenting providers of different forms of funding and capital for social enterprises in the two provinces. It builds upon their research in project A3 and was identified as a research need at the BC Social Enterprise Summit in 2008.



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Social Economy Fact Sheet

Project Title:	A9-2009 – Affordable Housing: Sustainable Management of Housing by Not-for-Profits and Co-ops
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; Finance
Keywords:	Social economy; housing; affordable housing; BALTA
Academic Researchers:	George Penfold (Selkirk College) Joanna Buczkowska and Jana Svedova, Sauder School of Business, UBC)
Community Partners:	Natasha Jategaonkar (BC Non-Profit Housing Assoc.)
Contact:	
End Date:	Completed 2009
Deliverables:	Literature review; report; analytical paper.
Project Description:	With the decline in government support for affordable housing, new models of financing and management have evolved. This project examined case studies of successful affordable housing initiatives by non-profit organizations and co-ops with a view to identifying success factors.



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Social Economy Fact Sheet

Project Title:	A10-2009 – Role of Faith Based Organizations in the Social Economy – Phase 2 – The Role of Catholic Religious Orders and the Mennonite Community
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; housing
Keywords:	Social economy; religious organizations, BALTA
Academic and Community Researchers:	Bob McKeon (St. Joseph's Theological College and Catholic Archdiocese of Edmonton)
Contact:	
End Date:	2011
Deliverables:	Literature review; report; analytical paper.
Project Description:	This a continuation of the research in Project A4 with a focus on case studies of specific religious institutions and their relationship to the social economy.



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Social Economy Fact Sheet

Project Title:	A11-2010 – Success Factors for Recently Incorporated BC and Alberta Co-operatives
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; housing
Keywords:	Social economy; co-operatives, BALTA
Academic Researchers:	Still being determined, but will include the Centre for Co-operative and Community-Based Economy at University of Victoria
Community Partners:	John Restakis (BC Co-operative Association); Michele Aasgard, Alberta Community & Co-operative Association
Contact:	
End Date:	(Fall 2010 or early 2011)
Deliverables:	
Project Description:	This project will examine co-ops that have incorporated in Alberta and BC over the past 10 years, both those that have succeeded and those that have not, aiming to identify success factors.



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Social Economy Fact Sheet

Project Title:	B1-2007 Understanding the Role of the Social Economy in Advancing Rural Revitalization and Development
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Social Enterprise; Natural Resources; Food Security
Keywords:	Social economy; BALTA; Non-timber forest products; local organic food systems; eco-tourism; fisheries; renewable energy
Academic Researchers:	Mary Beckie (Extension-University of AB) Sean Markey (Smon Fraser University)
Community Partners:	
Contact:	mary.beckie@ualberta.ca
End Date:	December 2007
Deliverables:	Draft research documents used to shape subsequent research ; nothing published
Project Description:	This project did some preliminary literature review and scoping vis a vis areas of research interest for BALTA's research cluster focusing on rural revitalization and development. While no reports or papers were published or presented at conferences, the research fed into subsequent research by this research group.



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Social Economy Fact Sheet

Project Title:	B2-2007 Sustainability and the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Sustainability and the Social Economy
Keywords:	Social economy; ecology; bio-economy; sustainability; well-being
Researchers:	Mike Gismondi (Arts Integrated Studies-Athabasca University) Lena Soots (Centre for Sustainable Community Development-Simon Fraser University)
Contact:	mikeg@athabascau.ca
End Date:	June 2009
Project Description:	This project examined the literature and proposed areas for attention with regards to strengthening the intersection between the social economy and sustainable development.



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Social Economy Fact Sheet

Project Title:	B3 - Sustainability, Heritage Conservation & Sheltering the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping; housing
Keywords:	Social economy; BALTA; heritage buildings
Academic Researchers:	Mike Gismondi (Athabasca University) Erin Swift (University of Calgary Faculty of Environmental Design)
Community Partners:	
Contact:	
End Date:	June 2009
Deliverables:	Literature review and bibliography; journal article; conference presentation
Project Description:	Many social economy organizations either operate out of, or own and manage, heritage buildings in urban and rural places. These heritage buildings provide a variety of functions. This project had the following objectives: To critically assess the relationship between heritage conservation and social economy organizations' needs for shelter; and to critically assess the concept of sustainability as it relates to heritage buildings, including the concepts of a 'built heritage' of social democracy and an architecture of the social commons.



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Social Economy Fact Sheet

Project Title:	B4 - Social Economy Case Studies in Rural Alberta: Participatory Research with Mexican and Albertan Undergraduate Students
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; BALTA mapping; portraiture; Rural Alberta
Academic Researchers:	Karsten Mündel, University of Alberta; undergraduate participants in the Puebla-Alberta Community Service Exchange
Community Partners:	Daniel Montes de Oca, Janet Wesselius; Hans-Dittmar Mündel, Community Partners in rural Albertan Communities
Contact:	
End Date:	Student work ended in 2009; written case studies will be completed in 2010
Deliverables:	Video podcasts; collection of case studies; journal articles; conference presentations
Project Description:	The Puebla-Alberta Community Service Exchange (PACSE) involves students from Augustana Campus, University of Alberta, and Universidad de las Americas in Puebla, Mexico, in community based learning and research in rural Mexico and Alberta. This project involved the students in case studies research focusing on social economy related organizations in rural Alberta. The case studies have been developed in podcast form and will be documented in writing.



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Social Economy Fact Sheet

Project Title:	B5 – 2008 – Farmers' Markets as Social Economy Drivers of Local Food Systems
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Food
Keywords:	Social economy; BALTA; farmers' markets; local food; food security
Academic Researchers:	Mary Beckie (University of Alberta) Hannah Wittmann & Herb Barbolet (Simon Fraser University) Will Low (Royal Roads University)
Community Partners:	Paul Cabaj (Canadian Centre for Community Renewal)
Contact:	
End Date:	
Deliverables:	(Final results integrated with Phase 2 – B7)
Project Description:	This project and Project B7 represent two phases of research examining the role of farmers' markets. The objective of this research is to examine the current and potential role of FMs in the development of local food systems. This research is informed by the following theories: clustering, actor network, and social embeddedness.



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Social Economy Fact Sheet

Project Title:	B6 – 2009 – Prospects for Socializing the Green Economy: The Case of Renewable Energy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Energy
Keywords:	Social economy; BALTA; renewable energy
Academic Researchers:	Noel Keough (University of Calgary Faculty of Environmental Design) Julie MacArthur (Simon Fraser University)
Community Partners:	Paul Cabaj (Canadian Centre for Community Renewal)
Contact:	
End Date:	(Mid-2010)
Deliverables:	Report
Project Description:	This project is exploring the experience to date and future potential for social economy involvement in green/renewable energy production in Alberta.



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Social Economy Fact Sheet

Project Title:	B7-2009 – Farmers' Markets as Social Economy Drivers of local Food Systems: Phase 2
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Food
Keywords:	Social economy; BALTA; farmers' markets; local food; food security
Academic Researchers:	See B5
Community Partners:	
Contact:	
End Date:	(Mid-2010)
Deliverables:	Reports and conference presentations
Project Description:	See B5



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Social Economy Fact Sheet

Project Title:	B8 – 2009 – Social Economizing Sustainability
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Sustainable Development
Keywords:	Social economy; BALTA; sustainability; food
Academic Researchers:	
Community Partners:	
Contact:	
End Date:	(August 2010)
Deliverables:	Several case studies, reports, conference presentations
Project Description:	This project supports a one year BALTA post-doctorate position at Simon Fraser University to undertake various areas of research related to sustainability and the social economy, with particular attention to food.



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Social Economy Fact Sheet

Project Title:	C1-2007 Summary of Quebec Policies that are Supportive of the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Public policy
Keywords:	Public policy; social economy; Québec
Academic Researchers:	Marguerite Mendell & Ralph Rouzier (Concordia University)
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal)
Contact:	CCCRlewis@island.net
End Date:	2006
Deliverables:	Report
Project Description:	This project collected information from existing studies to produce a report on the Quebec public policy environment for the social economy that could be shared with people in other jurisdictions.



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Social Economy Fact Sheet

Project Title:	C2-2007 Nova Scotia Co-operative Development System Case Study - Phase One
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Capacity Building, Finance, Public Policy
Keywords:	Case study; co-operatives; co-op development systems; Nova Scotia
Academic Researchers:	Lena Soots (Centre for Sustainable Community Development-Simon Fraser University)
Community Partners:	Mike Lewis & Stewart Perry (Canadian Centre for Community Renewal) Dianne Kelderman (Nova Scotia Cooperative Council)
Contact:	ccelewis@xplornet.com
Date of Completion:	2007
Deliverables:	Report; conference papers and presentations
Project Description:	This case study examined various elements of the co-operative development system in Nova Scotia with a view to identifying best practices and lessons for other jurisdictions. (See also Project C7.)



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Social Economy Fact Sheet

Project Title:	C4-2007 Preliminary Profile of the Size and Scope of the Social Economy in AB and BC
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Mapping; social economy, BALTA
Academic Researchers:	Jorge Sousa (Educational Policy-University of Alberta)
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal) Dan Swinney (Centre for Labor and Community Research)
Contact:	sousa@ualberta.ca
Date of Completion:	2008
Deliverables:	Research report; conference presentations
Project Description:	This study used existing data sources to develop a preliminary profile of the social economy within AB and BC; aggregate and separate data of the size and scope of the Social Economy. It was intended as a prelude to the mapping program that BALTA subsequently launched.



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Social Economy Fact Sheet

Project Title:	C5-2007 From Social Economy to Solidarity Economy: Changing Perspectives in a Volatile World - Phase 1
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Public Policy, Conceptual boundaries
Keywords:	CED; social economy; public policy; solidarity economy; public sector; private sector; comparative analysis
Academic Researchers:	
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal) Dan Swinney (Centre for Labor and Community Research)
Contact:	CCCRlewis@island.net
Date of Completion:	July 2007
Deliverables:	Research report; conference presentations
Project Description:	This project interviewed social economy leaders to examine and critique social economy definitions and trends, then looked at alternative formulations, specifically that of the solidarity economy.



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Social Economy Fact Sheet

Project Title:	C6-2007 From Social Economy to Solidarity Economy: Changing Perspectives in a Volatile World - Phase 2
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping, Conceptual boundaries
Keywords:	Case study; poverty; coalitions; social economy; solidarity economy; public policy
Academic Researchers:	
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal) Dan Swinney (Centre for Labor and Community Research)
Contact:	CCCRlewis@island.net
Date of Completion:	July 2007
Deliverables:	Research paper; conference presentations; published as paper in several languages
Project Description:	Case studies of Chicago and Montreal on coalitions and urban poverty, using the case studies to explore the relative merits of social economy and solidarity economy formulations. This was a follow-on from Project C5.



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Social Economy Fact Sheet

Project Title:	C7-2007 NS Co-op Development System Case Study; Phase 2: Analysis of Application in BC and AB
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Capacity Building, Finance, Public Policy
Keywords:	Co-operatives; co-op development systems
Academic Researchers:	
Community Partners:	Carol Murray (BC Co-operative Association) Michele Aasgard (Alberta Community and Co-operative Association) Michelle Colussi & Paul Cabaj (Canadian Centre for Community Renewal)
Contact:	
Date of Completion:	2009
Deliverables:	Guided discussion document; workshop presentations; report
Project Description:	This project built upon the results of Project C2 examining the co-op development system in Nova Scotia and used an action research approach to examine lessons, options and strategies for co-op development in BC and Alberta.



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Social Economy Fact Sheet

Project Title:	C9-2007 CED and Social Economy Policy Inventory in BC and AB; Phase 1
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Public Policy; Mapping
Keywords:	Public policy; CED; social economy; BALTA
Academic Researchers:	Jorge Sousa; Zane Hamm (Educational Policy-University of AB)
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal)
Contact:	CCCRlewis@island.net
Date of Completion:	2010
Deliverables:	Classification framework; inventory
Project Description:	This project involved design of a classification framework for looking at public policies and programs, then conduct of an inventory of CED and Social Economy relevant federal and provincial legislation; policies; programs and initiatives in BC and AB.



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Social Economy Fact Sheet

Project Title:	C10-2007 Municipal Government Support of the Social Economy Sector
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Public Policy
Keywords:	Local government; social economy; CED; best practices; comparative analysis
Academic Partners:	Peter Hall (Simon Fraser University) Mike Gismondi (Athabasca University); Emma Sharkey (University of Victoria); Robyn Webb (University of Manitoba)
Contact:	mikeg@athabascau.ca
Community Partners:	Jenny Kain (City of Edmonton); Brendan Reimer (MB Research Alliance on CED)
Date of Completion:	Winter 2008
Deliverables:	Report
Project Description:	This project has investigated municipal government support for the social economy in a broad range of areas and ways for large, medium and small municipalities in BC, Alberta, Saskatchewan, Manitoba and Northern Ontario. This was a joint project with the SK/MB/NWO node of CSERP.



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Social Economy Fact Sheet

Project Title:	C11-2007 Credit Unions as a Financing Source for the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Finance; Public Policy
Keywords:	Finance; credit unions; social economy
Academic Partners:	William Kendall (Public Policy-Simon Fraser University)
Contact:	mikeg@athabascau.ca
Community Partners:	Stewart Perry, Canadian Centre for Community Renewal
Date of Completion:	2008
Deliverables:	Research plan
Project Description:	This project involved some preliminary scoping for subsequent BALTA research on credit unions.



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Social Economy Fact Sheet

Project Title:	C13 – 2008 Return on Taxpayer Investment for Training Businesses
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Finance
Keywords:	Social economy; Quebec; training businesses; return on investment
Academic Partners:	Marguerite Mendell & Carol Dolbel (Concordia University) Jean-Marc Fontan (UQAM-ARUC)
Contact:	
Community Partners:	
Date of Completion:	2009
Deliverables:	Report
Project Description:	This project reviewed and summarized, in English, the evaluation research in Quebec with reference to the outcomes being achieved by training businesses, with particular attention to costs, benefits and the return on taxpayer investment being achieved. The intent was to provide data about the Quebec experience that can be used for promoting policy changes in other jurisdictions.



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Social Economy Fact Sheet

Project Title:	C14 – 2008 Leadership in the Community Sector: Understanding the Challenges, Competencies and Needs of Practitioners in the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Training
Keywords:	CED; social economy; community development; training and education, BALTA
Academic Partners:	Lynne Siemens & Matt Broadbent (University of Victoria)
Contact:	CCCRlewis@island.net
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal)
Date of Completion:	2009
Deliverables:	Report
Project Description:	This research project explored social economy sector perspectives on education and training needs as input to development of a new Master's level degree program.



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Social Economy Fact Sheet

Project Title:	C15 – 2008 Taking Social Embeddedness into Account in Monitoring the State of the Social Economy and Community Resilience
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Evaluation, Social Theory
Keywords:	Social economy; social embeddedness
Academic Partners:	Paul Reed (Carleton University)
Contact:	CCCRlewis@island.net
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal)
Date of Completion:	Fall 2010
Deliverables:	Discussion paper
Project Description:	BALTA has a fundamental interest in exploring how reciprocity and social connectedness can be elaborated in our economic life. This project is exploring how the concept of social embeddedness can contribute to understanding the impact of the social economy.



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Social Economy Fact Sheet

Project Title:	C16 – 2009 Survey of Social Enterprises in Alberta and British Columbia
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping, Social Enterprise
Keywords:	Social economy; BALTA; social enterprise
Academic Partners:	Peter Hall (Simon Fraser University) Peter Elson (Mount Royal University)
Contact:	
Community Partners:	
Date of Completion:	Mid-2010
Deliverables:	Report; input into BALTA mapping program
Project Description:	This project is surveying social enterprises in British Columbia and Alberta with the goal of developing clear indicators of their nature, scope and socio-economic contribution.



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Social Economy Fact Sheet

Project Title:	C17 – 2009 Building a Supportive Environment for Social Enterprise: Synthesis of SERC 3 Research
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Social Enterprise
Keywords:	Social economy; BALTA; social enterprise
Academic Partners:	Jorge Sousa (University of Alberta)
Contact:	
Community Partners:	David LePage (Enterprising Nonprofits)
Date of Completion:	2010
Deliverables:	Report
Project Description:	This project involved a cross-research analysis and synthesis of the relevance of BALTA research project findings to the social enterprise sector.



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Social Economy Fact Sheet

Project Title:	C18 – 2009 Procurement Policy & Market Development for the Social Economy: Expanding Market Opportunities for Social Enterprise, Co-operatives, and Other Social Economy Businesses
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Procurement, Finance, Social Enterprise
Keywords:	Social enterprise; procurement; finance; BALTA
Academic Partners:	James Tansey & Amanda Polak (Sauder School of Business, UBC)
Contact:	
Community Partners:	David LePage & Peter Roundhill (Enterprising Nonprofits)
Date of Completion:	2009
Deliverables:	Online toolkit of information and resources
Project Description:	This project analyzed best practice in procurement from social enterprises and developed resources to assist organizations in setting up social enterprise procurement policies and systems.



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Social Economy Fact Sheet

Project Title:	D1-2006 Literature Reviews for SERC 1; 2 & 3 Themes
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social enterprise; procurement; finance; BALTA
Academic Partners:	Mark Roseland; Peter Hall, Sean Markey, Rob O'Brien; Robyn Heaslip (Centre for Sustainable Community Development-Simon Fraser University); Andre Vallillee (Political Science-University of BC)
Contact:	roseland@sfu.ca
Community Partners:	
Date of Completion:	2007
Deliverables:	Literature reviews
Project Description:	Three parallel literature reviews were conducted in 3 topic areas: 1. Social Enterprise in Human Services and Affordable Housing 2. Social enterprise in Natural Resources, Local Development and Social Enterprise 3. Analysis, Evaluation and Infrastructure Development for the Social Economy



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Social Economy Fact Sheet

Project Title:	D2-2007 Leveraging Social Ownership of Proprietary Goods and Services related to the Golden Mussel to Expand Social Enterprise in Coastal BC Aboriginal Communities
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Natural Resources; Indigenous Communities
Keywords:	Natural resources; First Nations; ownership; social enterprise
Academic Partners:	Nadine Pinnell & Evelyn Pinkerton (Resource and Environmental Management-Simon Fraser University)
Contact:	CCCRlewis@island.net
Community Partners:	Doug Gordon (Native Brotherhood of BC) Kenn Renauld (Blue Frontiers Inc.) Mike Lewis (Canadian Centre for Community Renewal)
Date of Completion:	2010
Deliverables:	Three literature reviews; further reports, conference presentations
Project Description:	This research has focused in the first phase on three areas: Mussel Aquaculture Industry Development Experiences In Different Jurisdictions; Lessons Learned From Systematic Replication of Social Enterprises; and Best Practices in Social and Private Enterprise Franchising. Phase 2 research has explored the application of a social economy franchising model to mussel aquaculture development in two BC Coastal Aboriginal communities.



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Social Economy Fact Sheet

Project Title:	D3 – 2008 Land Tenure and the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Infrastructure, Finance
Keywords:	Social economy; BALTA; land tenure; land trusts
Academic Partners:	Karen Heisler & Mark Roseland (Simon Fraser University) Mike Gismondi, Lorelei Hanson & Sean Ryan (Athabasca University)
Contact:	
Community Partners:	
Date of Completion:	2009
Deliverables:	Report
Project Description:	This was the first phase of a two phase research process looking at land tenure models, particularly land trusts, and their relevance for addressing a range of needs within communities and the social economy. Phase 1 was a review of existing literature and experience in several Canadian and international jurisdictions.



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Social Economy Fact Sheet

Project Title:	D4 – 2008 Sustainable Infrastructure for the Social Economy: Cluster-based Social Enterprise Models
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Infrastructure
Keywords:	Social economy; social enterprise; BALTA; clustering
Academic Partners:	Lena Soots & Mark Roseland (Simon Fraser University) Jorge Sousa (University of Alberta)
Contact:	
Community Partners:	
Date of Completion:	2009
Deliverables:	Report; conference paper and presentations
Project Description:	This project investigated cluster based models of co-location amongst social economy organizations, best practices related to that and the range of benefits that clustering can provide.



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Social Economy Fact Sheet

Project Title:	D5 – 2008 Credit Unions as a Financing Source for the Social Economy and Rural Community Re-Investment
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Finance
Keywords:	Social economy; BALTA; finance; credit unions
Academic Partners:	Sean Markey & Freya Kristensen (Simon Fraser University)
Contact:	spmarkey@sfu.ca
Community Partners:	Stewart Perry (Canadian Centre for Community Renewal)
Date of Completion:	April 2009
Deliverables:	Report and conference paper
Project Description:	This project conducted several case studies to explore the role that credit unions are and can be playing in supporting the social economy and rural community re-investment.



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Social Economy Fact Sheet

Project Title:	D6 – 2009 Foundations for the Social Economy
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Sustainable Development
Keywords:	Social economy; CED; BALTA; sustainability; ecology; climate change; peak oil
Academic Partners:	
Contact:	CCCRlewis@island.net
Community Partners:	Mike Lewis (Canadian Centre for Community Renewal) Pat Conaty (New Economics Foundation)
Date of Completion:	2011
Deliverables:	Conference paper, subsequently translated into several languages and circulated internationally. Book
Project Description:	This project is examining community based strategies for confronting major global challenges related to such factors as climate change and peak oil and the potential for reconfiguring CED to address social, ecological and economic justice.



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Social Economy Fact Sheet

Project Title:	D7 – 2009 Land Tenure and the Social Economy – Phase 2
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Infrastructure, Finance
Keywords:	Social economy; BALTA; land tenure; land trusts
Academic Partners:	Mark Roseland (Simon Fraser University) Mike Gismondi, Lorelei Hanson & Sean Ryan (Athabasca University)
Contact:	George Penfold (Selkirk College)
Community Partners:	
Date of Completion:	Mid-2011
Deliverables:	Reports, conference presentation
Project Description:	This project will continue the research on land tenure and land trust models begun with project D3 and look more particularly at applications to the Alberta and BC contexts.



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Social Economy Fact Sheet

Project Title:	D8 – 2009 Credit Unions and Rural Reinvestment – Phase B
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Finance
Keywords:	Social economy; BALTA; finance; credit unions
Academic Partners:	Sean Markey & Freya Kristensen (Simon Fraser University)
Contact:	
Community Partners:	Stewart Perry (Canadian Centre for Community Renewal)
Date of Completion:	Mid-2010
Deliverables:	Report
Project Description:	This project continues the work of Project D5 and specifically looks in more depth at the role of smaller credit unions in rural communities.



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Social Economy Fact Sheet

Project Title:	D10 – 2009 Advancing the Social Economy Through Networks and Collaboration
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Infrastructure
Keywords:	Social economy; BALTA; finance; credit unions
Academic Partners:	Mark Roseland & Freya Kristensen (Simon Fraser University)
Contact:	
Community Partners:	
Date of Completion:	Mid-2011
Deliverables:	Report
Project Description:	This project is examining various models of networks and coalitions for their efficacy in meeting social economy needs and also for their potential to contribute to maximizing the legacy from the BALTA research alliance.



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Social Economy Fact Sheet

Project Title:	D11-2010 The Role of Social Enterprise in Employment Services in the British Columbia Context
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Infrastructure
Keywords:	Social economy; BALTA; employment services; social enterprise
Academic Partners:	Joanna Buczkowska (Sauder School of Business, UBC)
Contact:	
Community Partners:	David LePage (Enterprising Nonprofits)
Date of Completion:	Fall 2010
Deliverables:	Report
Project Description:	The research intends to explore the role that social and government programs, and training businesses have had and will continue to have in the community, with a focus primarily on the role that social enterprises have had on the landscape of employment services within the BC context since their emergence in the past decade.



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Social Economy Fact Sheet

Project Title:	E1-2007 Mapping Framework Development
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; survey; mapping
Academic Partners:	Lena Soots (Centre for Sustainable Community Development-Simon Fraser University); Mike Gismondi (Arts Integrated Studies-Athabasca University)
Contact:	
Community Partners:	Sandy Lockhart (Canadian Centre for Community Renewal)
Date of Completion:	2007
Deliverables:	Inventory; data scan; determine outcome indicators; data storage and repurposing strategy
Project Description:	This project involved development of the framework for a subsequent project to map social economy organizations in Alberta and BC.



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Social Economy Fact Sheet

Project Title:	E2-2007 Mapping the Social Economy in AB and BC - Phase 1
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; BALTA mapping; social enterprise, portraiture
Academic Partners:	Mike Gismondi (Arts Integrated Studies-Athabasca University) Noel Keough & Celia Lee, University of Calgary
Contact:	mikeg@athabascau.ca
Community Partners:	
Date of Completion:	Mid-2010
Deliverables:	Report; several conference presentations; journal article, MA thesis
Project Description:	This project as looked at mapping the social economy, and its relationship with other parts of the community, at a neighbourhood level in Calgary.



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Social Economy Fact Sheet

Project Title:	E3 – Mapping the Social Economy from the Ground Up: Urban Neighbourhood/Rural Community Case Study
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; survey; mapping
Academic Partners:	Julia Affolderbach (Simon Fraser University); Mike Gismondi & Lynda Ross (Arts Integrated Studies-Athabasca University)
Contact:	
Community Partners:	
Date of Completion:	2009
Deliverables:	Database of survey results; two interim reports on results; paper on mapping process
Project Description:	Identify and characterize Social Economy organizations in BC and AB; survey these organizations in order to determine the Social Economy's scope and characteristics. This phase marked the actual implementation of the survey research.



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Social Economy Fact Sheet

Project Title:	BALTA Mapping 2009 – 2010 – Survey, Survey Analysis, and Data Archiving
Associated Node:	British Columbia-Alberta Research Alliance on the Social Economy (BALTA) (British Columbia-Alberta Node) www.socialeconomy-bcalberta.ca
Theme:	Mapping
Keywords:	Social economy; survey; mapping
Academic Partners:	Mike Gismondi & Lynda Ross (Arts Integrated Studies-Athabasca University)
Contact:	
Community Partners:	
Date of Completion:	2011
Deliverables:	Database of survey results; report; publications
Project Description:	A continuation and wrap-up of the BALTA mapping program.

