LINKING, LEARNING, LEVERAGING
SOCIAL ENTERPRISES, KNOWLEDGEABLE ECONOMIES, AND SUSTAINABLE COMMUNITIES

The Northern Ontario, Manitoba, and Saskatchewan Regional Node of the Social Economy Suite[1]

ANNUAL REPORT 2006–2007

I OBJECTIVES, KEY ACTIVITIES, AND THEIR IMPACTS

1. Research Overview and Objectives

Social-economy enterprises direct organizational and community resources to the pursuit of social and community goals, providing flexible and sustainable tools to assist communities to achieve their own objectives in the areas of job creation and skills development, the environment, social support networks, economic growth, and neighbourhood revitalization, to name just a few areas of focus. Social-economy enterprises exist across Canada built on the tradition of co-operatives and nonprofit community enterprise as well as other innovative approaches. They frequently grow out of broad-based community development strategies that involve a range of local partners — citizens, government, voluntary sector, learning institutions, and business.

The goal of our research program is to develop and strengthen networks of social enterprise practitioners, academics, and policy makers. We strive to expand the overall capacity of social enterprises within our regional node by building the research capacity of social enterprises, while at the same time building student and scholarly capacity.

Our research focus includes five fundamental questions within the overarching inquiry of our project:

- What can we learn from social-economy enterprises about how to build more respectful relationships — with community, the environment, and organizational stakeholders?
- How can these learnings be shared in order to "raise the bar" within profit-seeking organizations?
- What are the best practices with regard to governance models — what can we learn from co-operative organizations; how can this knowledge be transferred?
- What kinds of financing strategies are needed to support the development and expansion of the social economy — what models exist; how well do they function for social-economy organizations? How should we measure social-economy organizations when traditional methods fail to capture the richness of social and

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[1] Hereafter referred to as Linking, Learning, Leveraging, or LLL.

economic objectives; what is the impact of social economy activity within the larger economy?
- What have governments done, what should they do — and not do — regarding the social economy?

Overall research objectives are being addressed more specifically within the many research initiatives planned or ongoing within the five thematic research clusters (which tend to cross provincial boundaries), as well as the three provincial research units: the Community Economic and Social Development Unit (CESD) at Algoma University College in Sault Ste. Marie; the Winnipeg Inner-City Research Alliance (WIRA) housed at the University of Winnipeg; and the Community-University Institute for Social Research (CUISR) at the University of Saskatchewan in Saskatoon.

2. Key Activities and Their Impacts

Nine research projects have been completed and the knowledge resulting from this work is starting to be disseminated. Project members — community partners, academics, and students — have all been active during the past year making presentations to a broad variety of audiences, government, academics, and community. Fourteen presentations have been given to workshops, thirty-five to conferences, six to symposia, and sixty-one to meetings with a variety of groups. Six research reports have been written and three working papers are complete. Five peer-reviewed book chapters have been submitted; one peer-reviewed and one non-peer-reviewed chapter have been accepted. Two journal articles — one peer-reviewed and one non-peer-reviewed — have been submitted. A manual and a self-assessment tool have been developed.

Since 2005, a total of $819,408.000 has been generated from sources external to the project. These additional funds have been instrumental to increasing the scope of research projects, as well as enabling fuller participation by community and academic partners in research planning and dissemination activities.

In March 2006, many of the project co-leads presented papers to a policy conference in Ottawa titled Communities Under Pressure: The Role of Co-operatives and the Social Economy, co-sponsored by the Policy Research Initiative, Privy Council Office, Government of Canada; the Co-operative Membership and Globalization project team (PI Brett Fairbairn, co-lead for the Governance Cluster); the Co-operatives Secretariat, Government of Canada; and the Rural Secretariat.

WIRA hosted the second Linking, Learning, Leveraging Regional Symposium in Winnipeg in February 2007. The symposium provided an opportunity for project partners to discuss a number of questions related to each thematic cluster, as well as to showcase all ongoing LLL research projects with a poster session. In conjunction with the regional symposium in Winnipeg, Manitoba project partners held their provincial workshop to discuss the upcoming Call for Internship proposals, and Northern Ontario partners also took advantage of the gathering to hold their provincial workshop.

Building Respectful Relationships: Conducting Community-Based Research, a workshop for graduate students studying the social economy, was held in May in conjunction with the 2007 Congress of the Humanities and Social Sciences. Twenty-five students from across Canada were joined by academic and community representatives to discuss a number of critical issues faced by community-based researchers. This workshop was a highlight of the year's student-focused activities and served to launch the Social Economy Graduate Student Network to be facilitated by the Social Economy Hub.

From 28 May to 1 June, the Centre for the Study of Co-operatives, on behalf of the LLL project, hosted a historic joint conference of three major co-operative organizations — the Canadian Association for Studies in Co-operation, the Association of Cooperative Educators, and the International Co-operative Alliance Committee on Co-operative Research. Titled Co-operative Innovation: Influencing the Social Economy, it was held in conjunction with the 2007 Congress of the Humanities and Social Sciences, a huge event hosted by the University of Saskatchewan that featured a Social Economy Theme Day. Nearly half of the eighty presentations at the joint conference were directly related this subject and involved research partners from the six regional nodes across the country.

II RESEARCH PROGRAM

Research activities are proceeding in numbers and at a pace that few of us could have anticipated when we first undertook this large project. Projects range from the international to the local; some are specific to a province, while others cover the study region of Northern Ontario, Manitoba, and Saskatchewan. The research underway examines topics as diverse as the viability of wilderness passenger trains; the impact of a reinterpretation of "The Song of Hiawatha" on the strength of a cultural community; the contribution of Francophones to the social economy outside of Quebec; policy issues around the Ontario and Saskatchewan disability support programs and services; the role of New Generation Co-operatives in increasing social cohesion among diverse stakeholders in the food system; and training programs for incarcerated individuals in Saskatchewan.

1. Research Implementation Model

The research program is implemented through two approaches: five thematic research clusters and three provincial-level organizations.

We recognize the importance of accessibility and have located administrative and community liaison units within each province. These provincial organizations collaborate with community partners to facilitate greater community involvement in the overall research program and distribute "community-responsive" funds to implement a research model more responsive to community needs and priorities.

The cluster approach for the planning and implementation of the Linking Learning Leveraging research program sees the program developed through consultation between academic and community partners in the context of a specific theme or research cluster.

There are five such clusters within the Linking Learning Leveraging project: Social Enterprise Development, Financing Strategies for Social Enterprise Development, Governance of the Social Economy, Measuring and Mapping the Social Economy, and Developing Policy Frameworks for the Social Economy.

We identified research priorities for individual clusters during the first regional symposium, held in January 2006. These priorities were further refined and confirmed at the second regional symposium in February 2007. Some of these projects are ongoing; some have yet to begin. Many of these projects cross provincial boundaries in terms of focus and/or participants.

The second approach sees the research program originating from the immediate challenges or opportunities encountered by the community partners. In this instance, interested academic and community partners work closely with the one of the three provincial-level organizations — the Community Economic and Social Development Unit at Algoma University College, the Winnipeg Inner-City Research Alliance at the University of Winnipeg, or the Community-University Institute for Social Research at the University of Saskatchewan — to develop a research proposal and to find a student to complete the work.

Two of the three provincial organizations (CUISR and WIRA) sponsor an annual call for research proposals. Guidelines ensure that proposals meet the research objectives of the node while remaining responsive to the needs of the community organization that responds to the call for proposals. The third provincial organization, CESD, develops targeted research projects in consultation with the Northern Ontario academics, government and community organizations, and individuals who are partners in the Linking, Learning, Leveraging project.

While research priorities must fit within the overarching priorities of the LLL project, they are designed to be responsive to the community context. In Manitoba and Saskatchewan, new proposals are submitted in the spring of each year, following provincial-level workshops with community partners in either the early winter (Saskatchewan) or late winter (Manitoba). In Northern Ontario, an initial meeting of stakeholders in April 2006 identified research priorities; these were confirmed at a provincial meeting held in conjunction with the regional symposium February 2007.

The projects listed in table A6 include research started prior to 1 September 2006 – 31 August 2007 but still ongoing during that period, as well as new projects started during the period covered by the annual report. Research projects are identified by provincial and cluster affiliation.

The following provides a general overview of the projects completed, ongoing and newly started within the Linking Learning Leveraging project. Detailed information regarding project titles, leads, objectives, deliverables and deadlines are provided in Table A 6.

2. Update on Research Projects

Completed

Nine research projects were completed during the period from 1 September 2006 to 31 August 2007.

The following were conducted in partnership with CESD:

- Community Resilience and the Arts: The Socioeconomic Impact of the Arts in the City of Sault Ste. Marie
- Garden River First Nation Performance of Hiawatha
- Community Supported Agriculture (CSA) Project

The three research projects focus on urban, First Nation and rural settings. In each case the goal is community resilience and building bridges between cultural communities. The research activity is completed but the reports are in the process of being written, including a manual on how to start a Community Supported Agriculture initiative (CSA). These reports can be accessed through the CESD and LLL website.

During the summer and fall of 2006, CUISR co-ordinated three research projects. The projects identified examples of the social economy found in each of three different settings in Saskatchewan: Rural, Urban, and Northern.

- Exploring the Social Economy in Saskatchewan: Rural
- Exploring the Social Economy in Saskatchewan: Northern
- Exploring the Social Economy in Saskatchewan: Urban

Preliminary results were presented to participants at the provincial workshop in December, providing input into discussions and forming the basis for identifying research priorities and potential proposals. The Call for Letters-of-Intent, issued in December 2006, focused on the issues and research priorities identified during the workshop. Ten Letters-of-Intent were received, and full research proposals were developed with input from the academic director of CUISR and the community liaison.

The following three projects were funded and completed by the end of August 2007. CUISR is working closely with the Aboriginal community in Saskatoon to establish baseline data, to plan research and evaluate ongoing initiatives. CUISR has also built a strong partnership with representatives of the disability community. Research reports are complete and available from both CUISR and the community partners, as well as through the LLL website.

- Aboriginal Funding Data Base
- Evaluation of Saskatoon Urban Aboriginal Strategy
- Putting People First: Building a Framework for Accessible, Individualized Resources for People With Disabilities

Ongoing

CESD co-ordinates two ongoing projects:

- Community Resilience Sault Ste. Marie

- Recovery of the Collective Memory and Projection into the Future

The first is a long-term examination of the social economy in Sault Ste. Marie, with a goal of building networks, strengthening planning processes and sharing knowledge gained throughout Northern Ontario communities. The second is an international project, in partnership with a Colombian community co-operative. The goal is to share knowledge and to learn from the development model utilized in Colombia.

Within the clusters, a variety of projects are underway.

Cluster 3 co-leads Brett Fairbairn, Centre for the Study of Co-operatives, and Quintin Fox, Canadian Co-operative Association, are leading a broad-ranging research project on the governance of social economy organizations that will result in accessible democratic planning tools, case studies, and research reports. Testing is ongoing for a governance diagnostic tool designed for practitioners developed using research gathered during 2005–06.

- Toolkit for Empowering Practices in Social Economy Governance and Planning

Cluster 4 co-leads Lou Hammond Ketilson and Monique Beaudoin are leading a number of ongoing research projects. The Northern Ontario, Manitoba, Saskatchewan node is partnering with the Southern Ontario node to conduct a census of co-operatives in Ontario. Existing data held by the Co-operatives Secretariat has been used to create maps that illustrate the concentration of co-operatives by sector and geography. These maps can be viewed on the LLL project website.

- Mapping Co-operatives and Credit Unions in Ontario
- Measuring and Mapping the Impact of the Social Economy: Co-operatives

New Projects Undertaken

Ontario
Our objective in Northern Ontario is to broaden our network and the focus of our research to many communities across the region. Four research projects launched in 2006-07 work toward that goal.

- Business Plan for Farmers
- Ontario Disability Support Program
- Coalition of Algoma Passenger Trains
- Women and Community Economic Development in Northern Ontario

The "Business Plan for Farmers" project builds on previous work with the Community Supported Agriculture model. The "Ontario Disability Support Program" extends the project's research partnership with the Disability Community to another province. The "Coalition of Algoma Passenger Trains" – focused on sharing knowledge and building connections between Aboriginal and non-Aboriginal communities, is a tourism-based strategy for sustaining remote communities. And finally, the "Women and Community Economic Development in Northern Ontario" project, which will culminate in a conference in April 2008, begins important work in documenting the importance of social economy organizations in women's lives.

Manitoba
Winnipeg is the site of an ambitious research project whose goals include research to establish baseline data, planning, business development, training and evaluation of social enterprises. The effectiveness of utilizing community learning circles, as the basis for network and enterprise development, will be explored.

- Community Research Hub: A Case Study of Social Economy

The state of the current provincial policy framework, necessary changes, and strategies for policy advancement are the focus of a major policy review.

- CED Policy Framework for Manitoba

2006–07 saw the expansion of the Manitoba research focus outside the inner city of Winnipeg to include two rural projects. Both projects consider the importance locality as a contributing factor to sustainability.

- Eat Where You Live: Building a Social Economy of Local Food in Western Canada
- Harvest Moon Society Marketing Cooperative: Building Social Capital through an Alternative Food Economy

Early results for the first three projects are available on the WIRA and community partner websites.

Saskatchewan
While co-operatives have a strong presence in Saskatchewan, there remain communities of place and person that has not seen co-op development to the same extent as can be found in the mainstream co-operative sector. Research is being conducted to identify needs and development strategies appropriate to currently un-served communities. This includes research projects conducted in partnership with the Aboriginal community, which consider issues of importance to rural, remote northern and institutionalized communities.

- Advancing the Co-operative Sector: Mapping Development Needs of Co-operatives in Emerging, Under-represented, and Struggling Sectors
- Pre-Apprenticeship Training and Work for Incarcerated Youth: Literature and Environmental Scan
- The Northern Trappers Association: Moving Forward as a Co-operative Enterprise
- Building Education and Training, Linkages and Leadership: Artisan Co-operative Business Development

Research reports are expected in the fall of 2007.

Within Clusters

Cluster 1
A master's student's thesis will contribute a theoretical framework to support the research ongoing in Northern Ontario and Saskatchewan's disability communities. The anticipated completion date is spring of 2009.

- The Contribution of Disability-Controlled Co-operatives to the Social Economy

Cluster 2

Two research projects are currently underway in cluster 2. The first is a survey examining the extent to which the current co-operative sector contributes to the development of social enterprises. The second is a larger study designed to examine the current state of financing for social enterprise development and to identify sustainable financing models.

- Assessing the Contributions of Co-operatives to Social Enterprise Development
- Sustainable Financing for the Social Economy

Cluster 3

The first stages of a comprehensive examination of collaborative governance models is underway. A literature review is almost complete. This fall a variety of models will be proposed and piloted within partner organizations in the Aboriginal and disability communities.

- Exploring Collaborative Governance Models

Cluster 4

Two mapping projects have been initiated to begin to document the nature and extent of the social economy in the Aboriginal and Francophone communities of Northern Ontario, Manitoba, and Saskatchewan. In both cases, literature reviews have been completed and conceptual frameworks identified. Case study research is ongoing.

- Mapping the Nature and the Extent of the Social Economy in Aboriginal Communities
- Initiatives, pratiques et appuis au développement économique communautaire : la participation de l'économie sociale dans la construction des capacités des communautés francophones: Nord de l'Ontario, Manitoba et Saskatchewan

Cluster 5

Cluster 5 co-leads Cris de Clercy and Brendan Reimer have approved a study to track the growth, decline, and public policy significance of key health care organizations and co-operatives in Saskatchewan and Manitoba.

- Independent Health Care Organizations and Canada's Social Economy

Two doctoral students and one masters student received scholarship funding in 2006 to examine topics of relevance to the policy research cluster. The use of community learning circles as a strategy for co-operative development in Saskatchewan during the 1940s is examined from an historical perspective. Completion of the thesis is anticipated in the winter of 2007.

- Adult Education and the Social Economy: Re-thinking the Communitarian Pedagogy of Watson Thomson

Two doctoral students will examine the current national policy framework, identifying limitations and opportunities with regard to the development of worker co-operatives and

multi-stakeholder co-operatives. Completion dates are anticipated for fall of 2008 and 2009.

- The Promise and Potential of Worker Co-operatives in Canada
- Re-engaging Citizens: Co-operatives as Public Policy Instruments for Democratic Renewal

Achievements

Developing strong partnerships with communities previously not connected to the university

3. Externally Funded Research Projects

Tri-Council

In the past year, two academic partners have been successful in securing SSHRC funding to support their research focus within the Linking, Learning, Leveraging project. Dr. Brett Fairbairn (U of Sask), with co-applicants Dr. M. Fulton (U of Sask) and Dr. M. Bouchard (UQAM) received a three-year standard research grant ($123,930) to examine "Cognition and Governance in the Social Economy." Dr. Murray Fulton (U of Sask) with co-applicant Dr. B. Fairbairn (U of Sask) received a three-year standard research grant ($45,000) to study Retail Co-operatives in Western Canada. (See Table A1)

Other

Most, if not all, of the research projects conducted within the three provinces included in the LLL node, have received additional or matching funds from sources outside the original project. The Community Economic and Social Development Unit (CESD) of Algoma University has been particularly successful, but partnership funding has also been secured by each of WIRA (U of Manitoba) and CUISR (U of Sask). Funds from federal, provincial, and municipal departments have enhanced SSHRC's annual contribution. Community partners — federal, provincial and local — have also contributed financial resources to support successful completion of the research projects.

Since 2005 a total of $819,408.000 in funds have been generated from sources external to the project. A complete listing is found in Table A1.

III DISSEMINATION AND PUBLIC ACTIVITIES

1. Events

In October 2006 project members hosted two SSHRC officials on a site visit at the Centre for the Study of Co-operatives and the Community-University Institute for Social Research to discuss research progress and reporting requirements. An opportunity to meet the members of the Centre Management Advisory Board, as well as Centre and CUISR students, staff, academic and community partners was provided over a breakfast meeting and during lunch hosted by the two facilities respectively. The LLL project website was also launched and a promotional banner for the project unveiled.

In December, the First Annual Saskatchewan Region Social Economy Workshop, sponsored by CUISR and the Centre, was held in Saskatoon. The thirty-four participants included students, academics, and community partners. Student researchers presented preliminary results from the *Exploring the Social Economy in Saskatchewan: Urban, Rural and Northern* project. Academic and community partners were asked to discuss questions relating to the 5 cluster themes to identify future internship research possibilities. A poster session displayed descriptions of six research projects underway.

The Second Regional Symposium was sponsored by WIRA in Winnipeg, February 2007. The symposium provided an opportunity for project partners to discuss a number of questions related to each thematic cluster, as well as showcasing all ongoing LLL research projects with a poster session. Symposium participants were treated to wonderful meals catered by a local social economy organization and an evening at a local social economy restaurant. In conjunction with the Regional Symposium in Winnipeg, Manitoba project partners held their provincial workshop to discuss the upcoming Call for Internship proposals. Northern Ontario partners also held their provincial workshop in conjunction with the 19–20 February Regional Symposium in Winnipeg.

From 28 May to 1 June the Centre for the Study of Co-operatives, on behalf of the LLL project, hosted a historic joint conference of three major co-operative organizations — the Canadian Association for Studies in Co-operation, the Association of Cooperative Educators, and the International Co-operative Alliance Committee on Co-operative Research. Titled "Co-operative Innovation: Influencing the Social Economy," it was held in conjunction with the 2007 Congress of the Humanities and Social Sciences, a huge event hosted by the University of Saskatchewan that featured a Social Economy Theme Day. Nearly half of the eighty presentations at the joint conference were directly related this subject and involved research partners from the six regional nodes across the country.

On 28 May, the project organized a day-long workshop for graduate students titled, "Building Respectful Relationships: Conducting Community-Based Research," jointly facilitated by academics and representatives from community-based organizations.

31 May was Social Economy Day, one of three theme days officially recognized by the Congress hosts. Congress-wide events in honour of the theme included keynote addresses by Dr. John Helliwell, Professor Emeritus of Economics, University of British Columbia, and Ms. Nancy Neamtan, Executive Director of the Chantier de l'économie sociale, and a Social Economy Sector panel whose members included Ms. Donna Heimbecker, Executive Director of the Saskatchewan Native Theatre Company, and Ms. Flo Frank, Executive Director of Common Works Development Institute. That evening conference registrants enjoyed a performance by the Saskatchewan Native Theatre Company.

On 1 June, conference registrants participated in a day-long study tour, choosing between an urban or rural tour of social economy organizations. The day culminated in a rural hospitality night in Meacham, a unique community of 95 residents who have sustained the economy of their small village through the development of social enterprises.

Participants from more than ten countries ate and danced the night away after enjoying visits to the local recording studio, a live theatre company, an artisans' studio, a historic church, and prairie elevator. The event, declared a tremendous success by all attendees, was co-ordinated by Flo Frank, an LLL community partner.

Planned

The annual provincial symposia for each of the three provinces included in the LLL project region are planned for the coming fall and early spring. As in the past, these events will be utilized to present research outcomes and to plan research priorities for the coming year.

PARO, a Northern Ontario based community partner, is organizing a Women and CED Conference in partnership with LLL for April 2008. Three meetings of the planning committee, a large group that crosses the three provinces, have been held by conference call.

2. Research Seminars

Social Economy research results have been featured in the Centre for the Study of Co-operatives Seminar Series, the CUISR Brown Bag Series, and the College of Agriculture and Bio Resources Graduate student seminar. Poster sessions in conjunction with both the Saskatchewan Social Economy Workshop held in Saskatoon in December 2006, and the LLL 2007 Regional Symposium held in Winnipeg, showcased all the projects underway. The poster can be viewed on the LLL website.

LLL team members comprised the panel on the Social Economy in Aboriginal Communities web cast by the Social Economy Centre (OISE/UT) Lunchbox Speaker Series, as well as the Social Economy Hub Tele-learning Session.

3. Conference Participation

Project members — community partners, academics, and students — have all been very active during the past year giving presentations specific to ongoing research projects to a broad variety of audiences. Fourteen presentations have been given to workshops, 35 to conferences, 6 to symposia, and 61 presentations to meetings with a variety of groups.

Presentations to policy makers were made to:

- Communities Under Pressure: The Role of Co-operatives and the Social Economy. Policy conference co-sponsored by the Policy Research Initiative, Privy Council Office, Government of Canada; the "Co-operative Membership and Globalization" project team; the Co-operatives Secretariat; and the Rural Secretariat, Ottawa, March 2006
- "Community Revitalization: Co-ops and Other Social Enterprises: Learning Seminar hosted by the Rural Secretariat, Saskatoon and Whitehorse, November 2006

Presentations to practitioners and community leaders were made to events such as:

- Community Leaders Forums
- Le conseil de la coopération de l'Ontario — Sudbury
- provincial and national CCEDNet events and conferences
- the Social Enterprise Conference
- provincial and regional symposia for the Linking, Learning, Leveraging project

Presentations to an audience of academics were made at the following conferences:

- Association canadienne-française pour l'avancement des sciences
- Canadian Association for Studies in International Development InSight Conference
- Graduate Student Workshop
- Joint meetings of the International Co-operative Alliance Committee on Co-operative Research, the Canadian Association for Studies in Co-operation and the Association of Cooperative Educators in conjunction with the 2007 Congress of the Humanities and Social Sciences

And finally, academic presentations to an international audience were made to:

- Association of Co-operative Educators in Puerto Rico
- Community Development Society Conference, Wisconsin
- American Agricultural Economics Association annual meetings
- International Seminar on the Social Economy in Belgium
- the CIRIEC International Working Group on Measuring the Social Economy in Spain

Planned

Two project members will present papers to the Symposium on Co-operative Innovations sponsored by the Committee on Co-operative Research at the International Co-operative Alliance General Assembly, Singapore, October 2007.

The LLL project will be well represented by academics, community partners, and students at the upcoming First International CIRIEC Research Conference on the Social Economy, October 2007, Victoria. Members of the research team will also be presenting social economy research results to the CRISES 2nd International Conference titled Creating and Diffusing Social Innovation: from Initiative to Institutionalization, UQAM, November 2007, Montreal.

Table A4 provides a detailed breakdown of presentations.

4. Bulletins

Our first project bulletin was distributed in late summer. A four-page overview of project activities, the bulletin highlighted the range of projects underway, the research cluster oversight team, and student activity. The goal is to distribute a bulletin twice per year to the total project team, as well as key organizational stakeholders associated with the Centre for the Study of Co-operatives, the Community Economic and Social

Development Unit, the Winnipeg Inner-City Research Alliance, and the Community-University Institute for Social Research.

5. Website

The Linking, Learning, Leveraging website — www.usaskstudies.coop/socialeconomy — was launched in October 2006. The site includes detailed information regarding the thematic clusters and provincial level research activities, with links to both academic and community partner websites. A secure team site provides discussion forums organized by research clusters. Completed projects are posted to the website or linked to via the website. Efforts are ongoing to make the website as useful and interactive as possible.

6. Publications

Complete

The results from nine completed research projects are only just beginning to appear. Six research reports have been written and three working papers are complete. Three peer-reviewed book chapters have been submitted; one peer-reviewed and one non-peer-reviewed have been accepted. Two journal articles — one peer-reviewed and one non-peer-reviewed — have been submitted. A manual and a self-assessment tool have been developed.

Planned

A peer-reviewed special edition of *The Review*, the publication of the International Co-operative Alliance Committee on Co-operative Research is forthcoming. The contents will include selected articles from the joint meetings of International Co-operative Alliance Committee on Co-operative Research, the Canadian Association for Studies in Co-operation, and the Association for Cooperative Educators held in Saskatoon in May 2007. Conference proceedings have been prepared and will soon be posted on the conference and LLL website. And, finally, a book is planned for a set of selected papers from this three-day conference. (See Table A5).

7. Media Participation

Project team members participated in twenty media events during the 2006–07 period, including newspaper, radio and television interviews. Many of these took place in conjunction with events held in small communities where research results were being presented or awareness was being generated in relation to upcoming research projects. The media, national and local, was also very interested in the social economy presentations and study tours associated with the 2007 Congress for the Humanities and Social Sciences.

IV PARTNERSHIP AND COLLABORATION

1. Collaboration with Other Organizations

The Linking, Learning, Leveraging project has been very fortunate to be able to partner with three excellent organizations: the Community Economic and Social Development Unit at Algoma University College (CESD), the Winnipeg Inner-City Research Alliance at the University of Winnipeg (WIRA), and the Community-University Institute for Social Research (CUISR) at the University of Saskatchewan. Each of these organizations has years of experience in conducting respectful community-based research. CUISR and WIRA are very successful community-university research alliances in their own right; CESD has an extremely successful track record in working with surrounding Aboriginal communities. The mission and values of these three organizations ensures that community partners are valued, respected, and involved. Their role and responsibility for community liaison at the provincial level is integral to the effective implementation of the LLL research program.

2. Research Collaboration and Networks

The initial application forwarded by the Linking, Learning, Leveraging project team was very strong in terms of its partnerships with relevant federal and provincial departments, as well as national and provincial co-operative organizations. In addition, a broad range of community organizations in Saskatchewan and somewhat less so in Manitoba, committed their participation and support to the project application. Representation in Northern Ontario, however, was limited.

The academic director for Northern Ontario, Dr. Gayle Broad, has made significant progress in enlarging the network of Northern Ontario community partners and academics associated with the Linking, Learning, Leveraging project. A workshop held in April 2006 brought together over thirty community representatives and academics to explore regional needs and identify corresponding research priorities. Building on existing research and community networks, she has succeeded in bringing members of the Francophone and Aboriginal community into the project team, and expanded the reach of the research to include an academic from Laurentian University, a community leader from a women's social enterprise organization in Thunder Bay, and a community member from the far northern region on James Bay. A number of initiatives are now underway that cross the entire Northern Ontario region, including a mapping project with Francophone communities and a women's conference planned for the spring of 2008. A number of smaller initiatives are also working in a broader regional capacity including a food security network and an indigenous initiative related to the education, training and retention of human capital within First Nations.

A Northern Ontario workshop held in February in conjunction with the Second LLL Regional Symposium in Winnipeg saw seventeen team members from Northern Ontario participate, moving forward on the research planning process. This workshop identified the themes that are arising in Northern Ontario and reflected on the progress to date and any gaps. The group decided that there would be a continued emphasis on the Francophone and women's projects, and on continuing to build the Indigenous initiatives.

The addition of Dr. Rachid Bagaoui from Laurentian University, Sheila Gruner, a PhD student working with Fort Albany First Nation, and Christine Sy, an Aboriginal Master's student from Trent, have extended the academic depth to the Northern Ontario team. The addition of Rosalind Lockyer, Monique Beaudoin, and José Reyes has also added depth on the community partnership side.

Cris de Clercy, Cluster 5 academic co-lead, moved from the University of Saskatchewan to the University of Western Ontario in July of 2006. Her move adds another university to our research network. 2006–07 also saw the addition of two more international academic partners, Dr. Will Bartlett from the University of Bristol and Dr. Christina Clamp, Southern New Hampshire University. Dr. Bartlett has joined the Management Board as one of two international observers. José Reyes is our second international observer, representing the community co-operative Asopricor from Colombia. Asopricor is partnering with CESD in a number of joint research initiatives.

Four of the LLL academic partners, Dr. Brett Fairbairn (U of Sask), Dr. Marie Bouchard (UQAM), Dr. Leslie Brown (Mount Saint Vincent), Dr. Ian MacPherson (U Vic), and myself are co-investigators in the SSHRC funded Strategic Research Network on Social Innovation, the Social Economy and Civil Society. The PI on this research initiative is Dr. Dennis Harrisson, Director of CRISES. Dr. Jean-Marc Fontan (UQAM), Dr. Janet Siltanen (Carlton), and Dr. Doug Baer (U Vic) make up the rest of the research team. The goal of the project is to create a strategic research network linked to the social economy and civil society initiatives. The team has met twice to develop an understanding of our respective research and to identify collaborative research possibilities. We intend to submit a Letter of Intent to SSHRC for a Major Collaborative Research Initiative in January 2008 and hope to move to application stage in the fall of 2008. The focus of the application will be comparative studies across Canadian provinces on the Plural Economy and the Conditions for Social Innovation. A successful proposal would support greater student and community partner involvement in an emerging strategic research network focused on the social economy.

Ensuring Participation

Community and academic partners are working closely in the planning and implementation of the research projects as well as related dissemination activities.

Project participants (co-applicants, collaborators, and partners) have attended two regional symposia and four provincial workshops to share ideas, provide feedback on planned and completed research, to set research priorities, and to signal interest in participating in or initiating a research project. Each of these gatherings has further facilitated the ongoing research planning, implementation, feedback and analysis, and dissemination process occurring within and among clusters.

Partner organizations are providing the time of senior management, board volunteers, and research and marketing staff as in-kind contributions to the project. These community personnel have been and will continue to be involved in research planning, providing input into the direction of the research, brokering connections between the project and local members and communities, and in some cases, data collection.

Regional symposia and provincial workshops, a project newsletter and web pages, as well as Internet-based discussion forums provide mechanisms to maintain communication among all participants. Within the clusters, internet and telephone conferences and the discussion forums are primary means through which research is being planned and implemented.

At the specific project level, regular meetings are held and participants give input throughout the duration of the project, including during the data-gathering stage and discussion of the draft results. For example, CESD holds weekly research meetings where the research activities are reported on by student and/or community-based researchers and feedback is provided. All community partnership research projects hold regular meetings with the community partner. In the Asopricor project, for example, the research is discussed at annual general assemblies, as well as at quarterly meetings with the association's executive and other meetings with the focus communities.

3. Student Training

Students are involved in the LLL project in three ways, as recipients of scholarships to support their graduate research; as recipients of internships working in partnership with community organizations; and as research assistants for projects conducted within one of the five clusters. To date, thirty-five students — fifteen undergraduate, fourteen masters, and six doctoral — have received training through their involvement in social economy project research. Among the group, four scholarships — two Ph D and two MA — were approved in the fall of 2006. Students are in various stages of completion. Two more PhD scholarships have been approved for the fall of 2007. (Table A3)

In Saskatchewan, student researchers have been learning how to mobilize knowledge for different audiences in different settings and how that process itself becomes part of the project of building social capital and cohesion. Community partners and academic researchers (students and faculty) have had ongoing discussions on how to enable community-university partnerships in ways that fully respect community knowledge, that offer opportunities for community-university learning, and ensure that benefits are returned to the community.

Student interns have already developed or refined skills in the following areas:
- research methodology design
- completing ethics applications
- respectful research protocols for Aboriginal communities
- individual and focus-group interviews
- data collection and policy analysis
- case and report writing (including editing and proofreading)
- poster and PowerPoint presentation skills suited for varied audiences
- geo-coding and organizing data, mapping distributions of co-operatives in different regions of Canada
- presentations to academic and community conferences

In Manitoba, student and community researchers have gained the following skills:

- liaising with community groups
- literature reviews
- data collection, organization (coding), and entry
- data analysis using SPSS
- survey development
- interview techniques
- transcription
- draft report writing
- and presentation skills

In Northern Ontario, community and university researchers are developing skills in:

- participatory action research
- interviews and focus groups
- data collection
- data analysis using grounded theory analysis and N6 and SPSS software

Community and university researchers are also gaining an understanding about the nature and processes of community-based research.

Building Respectful Relationships: Conducting Community-Based Research — A Workshop for Graduate Students Studying the Social Economy was held 28 May in conjunction with the 2007 Congress of the Social Sciences and Humanities. Twenty-five students from across Canada were joined by academic and community representatives to discuss a number of critical issues faced by community-based researchers. This graduate student workshop was a highlight of the year's student-focused activities and served to launch the Social Economy Graduate Student Network to be facilitated by the Social Economy Hub.

V GOVERNANCE, MANAGEMENT AND ADMINISTRATION

1. Management Board

Management Model

A co-management model permeates both the governance and management structure of the project. The Management Board is a decision-making body responsible for setting policy and direction for the overall project, taking into consideration input from the Advisory Council. The Management Board is comprised of the project director, the five cluster academic and community co-leads, the directors of the three provincial-level organizations, and two international representatives — one an academic, one a community member. The Advisory Council will be comprised of two community partners from each of Northern Ontario, Manitoba, and Saskatchewan, plus two at-large community partners.

Decision makers representing the community and academia make decisions regarding research activities and the allocation of research funds. At the provincial level, each of the three organizations has a co-management model in place, with a person responsible for academic leadership and liaison, and a person responsible for community leadership and liaison. Two of the three provincial organizations (CUISR and WIRA) sponsor an annual call for research proposals. Guidelines ensure that proposals meet the research objectives of the node while remaining responsive to the needs of the community organizations that respond to the call for proposals. Proposals are adjudicated in WIRA by a community-led executive committee and in CUISR by an advisory committee comprised of academics and community representatives.

Each of the five research clusters is led by a community and academic co-lead, which works in close collaboration with the members of the research cluster to make decisions regarding research priorities and the allocation of resources. The academic co-lead provides academic and administrative leadership, in consultation with the community co-lead, within the clusters. Community co-leads have been chosen or elected based on their relevant expertise and background. Their role, degree of, and length of involvement may vary by cluster, but is expected to be that of a peer to the academic co-lead in terms of research leadership. Depending on the decision of the cluster, it is also possible that they will provide administrative leadership as well.

The Advisory Council, which will be comprised of two community partners from each of Northern Ontario, Manitoba, and Saskatchewan, plus two at-large community partners, is in the formation stages. This body will provide advice to the Management Board on the overall direction of the research at a high level rather than operational, and will play a particularly important role in the ongoing evaluation of the project. It is anticipated that the Advisory Council will meet at least three times during the length of the project in conjunction with regional symposia or provincial workshops. Potential members for the Advisory Council are currently being approached. We intend to hold our first meeting in the fall of 2007.

The management board met three times by conference call and three times in person between 1 September 2006 and 31 August 2007, averaging a meeting every two months. In between management board meetings, information is distributed regularly by email, website, and telephone.

2. Committee Activities

Cluster Level

Cluster members held their first in person meeting during the First LLL Regional Symposium in Saskatoon, January 2006. They had an opportunity to meet in person again in February 2007 at the Second LLL Regional Symposium in Winnipeg. Cluster co-leads are in contact with each other by telephone and email. Cluster based discussion forums were set up on the project website in the fall of 2006 to facilitate ongoing discussion on cluster themes and projects in between opportunities to meet in person.

Provincial Level

Saskatchewan
Working under the auspices of CUISR, the academic and community co-leads, with assistance from the CUISR community liaison, planned a one-day workshop held in December 2006. Thirty-four Saskatchewan academics, community partners, and students attended. Student researchers presented preliminary results from the Exploring the Social Economy in Saskatchewan: Urban, Rural, and Northern project. Academic and community partners were asked to discuss questions relating to the five cluster themes to identify future internship research possibilities. A poster session displayed descriptions of six research projects underway. A Call for Letters of Intent with regard to proposed projects was drafted based on the input received from workshop participants. The adjudication committee met in March to review of the Letters of Intent for Saskatchewan-based community internship proposals. The following projects were approved for a start date of May or September 2007:

- Aboriginal Funding Database
- Putting People First: Building a Framework for Accessible, Individualized Resources for People with Disabilities
- Building Education and Training, Linkages and Leadership; Advancing the Saskatchewan Co-operative Sector
- Collaborative Governance Model Initiatives
- Co-operative Development Program
- South West Centre for Entrepreneurial Development Inc.
- Training Programs for Individuals Incarcerated.

Manitoba
Working under the auspices of WIRA, the Manitoba project partners organized the Second LLL Regional Symposium in Winnipeg, 19–20 February. Whereas the 2006 Regional Symposium was dedicated to introducing the uniqueness of the Northern Ontario, Manitoba, and Saskatchewan Social Economy landscape to project partners and partners to each other, the 2007 Symposium provided an opportunity for project partners to discuss a number of questions related to each thematic cluster, as well as showcasing all ongoing LLL research projects with a poster session. Symposium participants were treated to wonderful meals catered by a local social economy organization and an evening at a local social economy restaurant.

Manitoba project partners held their provincial workshop to discuss the upcoming Call for Internship proposals in conjunction with the Regional Symposium in Winnipeg. The adjudication committee reviewed applications in March, and funded the following projects to begin in May or September 2007:

- CED Policy Framework for Manitoba
- Eat Where You Live: Building a Social Economy of Local Food in Western Canada
- Harvest Moon Society Marketing Cooperative: Building Social Capital through an Alternative Food Economy
- Building a Tax Policy Framework to Enable Co-operative Development

<u>Northern Ontario</u>
Northern Ontario partners held their provincial workshop in conjunction with the 19–20 February Regional Symposium in Winnipeg. As a result of their consultation process, the following research projects were funded with a start date of May or September 2007:

- Business Plan for Farmers
- Ontario Disability Support Program
- Coalition of Algoma Passenger Trains
- Women and Community Economic Development in Northern Ontario

3. Administration and Infrastructure

Oversight of the entire project and associated administrative tasks are the responsibility of the principal investigator, assisted by the regional node project administrator and other staff at the Centre for the Study of Co-operatives, University of Saskatchewan, in Saskatoon. The project receives .75 FTE from the Centre's librarian/ project administrator, .25 FTE support from each of the Centre's two clerical/office admin positions, and .1 FTE support from each of the Centre's editor and education liaison/research officer.

The P.I. has retained authority over resources allocated for regional conferences, communication within the node, dissemination of research and publications, and a limited pool of funds for research. She has also retained control over Saskatchewan-directed resources for student conference travel and funds for cluster co-leads and the CUISR director to travel to attend planning meetings. Funds allocated to the five clusters and three provincial organizations are disbursed annually and administered through the relevant universities.

Responsibility for leading provincially based research initiatives, organizing provincial workshops and facilitating interaction among provincial partners, and supporting student training, is held by the Community Economic and Social Development Unit at Algoma University College (CESD) in Sault Ste. Marie, the Winnipeg Inner City Research Alliance at the University of Winnipeg (WIRA) and the Community – University Institute for Social Research (CUISR) at the University of Saskatchewan in Saskatoon. Each of these units receives annual funding, although modest, for their administrative and community liaison roles, as well as annual funding for student internships and provincial workshops.

4. Support from Universities

The Northern Ontario, Manitoba, and Saskatchewan Node is very appreciative of the support received from the universities associated with the project. The Office of Research Services, University of Saskatchewan, has provided excellent administrative support, and facilitated trouble free fund transfers between the U of S and four other universities — Algoma University College, University of Western Ontario, University of Winnipeg, and University of Manitoba. The receiving universities have provided generous

administrative support to the units and departments in which the partner academics are located.

LLL receives an annual contribution of $20,000.00 from the Office of the V-P Research for student scholarships, plus matching funds for one research time stipend; the Edwards School of Business, home college for the PI, provides another full research time stipend. Cash and in-kind support from the Centre for the Study of Co-operatives, University of Saskatchewan, ensure stable and effective administrative and professional support to the project.

And finally, many thanks are owed to the Community Economic and Social Development Unit at Algoma University College (CESD) in Sault Ste. Marie, the Winnipeg Inner-City Research Alliance at the University of Winnipeg (WIRA) and the Community-University Institute for Social Research (CUISR) at the University of Saskatchewan in Saskatoon. The support of these units, and the support of their universities in turn, is integral to the successful functioning of the Linking, Learning, Leveraging project.

5. Leverage of External Funding

Most, if not all, of the research projects conducted within the three provinces included in the LLL node, have received additional or matching funds from sources outside the original project. The Community Economic and Social Development Unit of Algoma University has been particularly successful, but partnership funding has also been secured by each of WIRA (U of Manitoba) and CUISR (U of Sask). Funds from federal, provincial and municipal departments have enhanced SSHRC's annual contribution. Community partners — federal, provincial and local — have also contributed financial resources to support successful completion of the research projects.

CESD has recognized the long-term opportunity associated with being a partner in the LLL project and is leveraging SSHRC and partner funds to build a research presence at Algoma University College.

Since 2005 a total of $819,408.000 in funds have been generated from sources external to the project. A complete listing is found in Table A1.

VI   CHALLENGES FACED AND CHALLENGES AHEAD

1. Geographical Challenges

Each province contained within our node has a very large geographical area so it is challenging to make linkages with the far Northern communities and to connect effectively across the three provinces. Travel throughout such a large geographical region is very expensive.

In recognition of this, the project has budgeted funds to defray costs for community partners to participate in regional and provincial workshops. These events offer important

opportunities for partners to provide input into the research planning and implementation process.

We have had very good attendance at our regional symposia (January 06: 75; February 07: 44) and attendance at provincial workshops has been excellent in some locations, fair in others (Ontario, April 06: 30+; Asopricor in Colombia: three assemblies with 150 people at each; Saskatchewan, December 06: 34; Ontario February 07: 17; Manitoba February 07: 10).

2. Cultural Divides

The presence of three predominant cultural groups in the Northern Ontario, Manitoba, and Saskatchewan node — Indigenous, Anglophone, and Francophone — adds complexity to efforts already challenged by geography. Careful attention is paid to program planning and provision of interpretation services for regional symposia, provincial workshops, and the recent International Conference held in conjunction with the 2007 Congress of the Humanities and Social Sciences, to encourage full participation. We have been encouraged by the response to our efforts thus far and will continue to make this a high priority of the project overall.

3. Achieving a Balance of Power

Although the project is using a co-management model at every level of the administrative and governance process, we recognize that despite these efforts, imbalances in power will occur, primarily on the community side, which is typically disadvantaged in terms of time and money resources vis-à-vis academia. We have designated funds in recognition of the community partners' involvement in the management board or cluster co-leadership, and make every attempt to defray expenses for all meetings.

We have put in place the structure and the process for making decisions inclusive of both academic and community partners' interests and priorities. Both constituencies have participated at high levels, but not always to the same degree at the same time. The time and financial resources of community participants are often stretched, which prevents the co-leads from participating fully in all board meetings and workshops. Job changes have resulted in turnover and reduced involvement of the community co-leads within two of the research clusters. One cluster was delayed in identifying a community representative. The academic partners find that university teaching schedules also interfere with full participation.

Cluster co-leads are in contact with each other by telephone and email, some more regularly than others. Cluster-based discussion forums were set up on the project website in the fall of 2006 to facilitate ongoing discussion on cluster themes and projects in between opportunities to meet in person. Despite ongoing encouragement to use the forum sites to keep in touch, they have not received much use. We will be reassessing the design of the discussion forums in the coming year.

On the whole, the participation of community and academic partners in governance and management decisions has been fairly equal. This is a high priority of the project and we continue to work towards achieving this balance.

A1. Leverage of funding (funds by source by year)

CESD = Community Economic and Social Development Unit, Algoma University College
WIRA = Winnipeg Inner City Research Alliance
CUISR = Community-University Institute for Social Research

External funds leverage (a part of SSHRC grant) and including host institution's contributions						
Years	**2005-2006**	**2006-2007**	**2007-2008**	**2008-2009**	**2009-2010**	**Total**
Partners						
Partner organization – CESD – Northern Ontario Region						
FedNor	$17,500	35,000	52,500			105,000
Canadian Community Economic Development Network	8,500	8,500	24,000			41,000
Rural Economic Development	28,538					28,538
Economic Development Corporation	350					350
Laurentian University Research Fund	1,000					1,000
Northern Ontario Heritage Fund		10,000	20,000			30,000
Human Resources and Social Development Canada	5,000					5,000
Community Development Corporation	5,000					5,000
Community Economic and Social Development Programme	17,500	38,500	17,500			73,500
Sault Ste. Marie Economic Development Corporation			3,000			3,000
Northern Credit Union			3,000			3,000
Job Creation Partnership Grant			60,473			60,473
Partner organization – WIRA – Manitoba Region						
Winnipeg Partnership Agreement	20,020	29,170				49,190
CSEHub (Travel for student to attend Sommet de l'économie sociale et solidaire in Montreal)		1,000				1,000
ARUC (Registration for student to attend Sommet de l'économie sociale et solidaire in Montreal)		400				400
Partner organization – CUISR – Saskatchewan Region						
Saskatchewan Association for Community Living		9,000				9,000
Urban Aboriginal Strategy		15,500				15,500

Principal investigator – Lou Hammond Ketilson – Saskatchewan					
University of Saskatchewan (PI)	20,000	20,000	20,000	20,000	20,000	100,000
Canadian Co-operative Association (PI)		(in kind) 3,000				3,000
Centre for the Study of Co-operatives, U of S		3,000				3,000
* SSHRC - "Strategic Research Network on Social Innovation, the Social Economy, and Civil Society" (co-investigator)	25,000					25,000
Academic partner – Brett Fairbairn – Saskatchewan						
** SSHRC Standard Research Grants – "Cognition and Governance in the Social Economy"		123,930				123,930
President's SSHRC Research Fund	5,000					5,000
Academic partner – Murray Fulton – Saskatchewan						
*** SSHRC Standard Research Grants – "Identity and Success in a Federated Marketing System: Retail Co-operatives in Western Canada"		45,000				45,000
**** Knowledge Impact in Society Program, "Adapting to New Environments: Agriculture and Rural Economies in the 21st Century"		300,000				300,000
Academic partner – Rose Olfert – Saskatchewan						
Centre for the Study of Co-operatives, U of S	12,000	10,000	10,000			32,000
Co-operatives Secretariat		17,000				17,000
Total	**165,408**	**669,000**	**210,473**	**20,000**	**20,000**	**1,084,881**

* Dr. B. Fairbairn and Dr. M. Bouchard are co-investigators on this grant
** Dr. M. Fulton and Dr. M. Bouchard are co-investigators on this grant
*** Dr. B. Fairbairn is a co-investigator on this grant
**** Drs. B. Fairbairn, M. Gertler, and L. Hammond Ketilson are co-investigators on this grant

A2. Partnerships — Number of partners per category (i.e., all three level of government, NGOs, private sector, universities)

Number of regional partners per centres						
Year	Provincial Government	Municipal Government	NGO	Universities	Co-ops	Total
2004-2005	2 + Fed. Gov't 1		9	Univ. of Saskatchewan 8 + C-RERL 1 + CUISR 1 + CSC 1 + AgEcon 1 = 12 Univ. of Regina 2 Univ. of Manitoba 2 Univ. of Winnipeg 1 + WIRA 1 + Dept. of Urban St. 1 = 3 * Algoma Univ. Coll., Ont. 1 + CESD 1 = 2 Univ. of Toronto 1 Univ. of Wisconsin, USA 1 + Center for Cooperatives 1 = 2 UQAM, QC 1 Mount Saint Vincent Univ., NS 1 Univ. of Alberta 1 Univ. of Victoria 1 Ohio State Univ. 1 Univ. of Maryland, College Park, USA 1	21	63
2005-2006			3		1	4
2006-2007	4	2	22	Univ. of Western Ont. 2 Laurentian Univ., Ont. 1 Southern New Hampshire Univ., USA 1 Red River College, Man. 1 Univ. of Bristol, UK 1		34
Total	7	2	34	36	22	101

* CESD works with eight NGO's and one municipality, only two of which have "official status" with SSHRC at the moment.

A3. Students training per category (i.e., BA, MA, PhD, postdoctoral)

	Citizenship		Undergraduate		MA Theses		Ph.D. Theses	
	Canadian	Foreign	In Progress	Complete	In Progress	Complete	In Progress	Complete
Undergraduate	13	2	8	7				
Masters	13	1			10	4		
Doctoral	5	1					6	
Postdoctoral								
Total	**31**	**4**	**8**	**7**	**10**	**4**	**6**	

A4. Number of presentations per type (e.g., workshops, conferences, lectures, seminars) Held (H) or Planned (P)

Event Type	# Aimed at academic audiences		# Aimed at non-academic audiences		# Aimed at both academic and non-academic audiences	
	H	P	H	P	H	P
Workshop	3		3		8	
Conference	7	4	9		13	8
Congress	4	1			2	
Symposium					6	
Meeting	1		55		5	
Other(s) – Specify: – OISE webcast – CSEHub tele-learning web-conference – Poster presentation – Media participations						1 1 1 20

A5. Number of Publications (i.e., papers, book chapters, books)

Publication Type	# Submitted		# Accepted for publication		# Published	
	# Peer-reviewed	# Non Peer-reviewed	# Peer-reviewed	# Non Peer-reviewed	# Peer-reviewed	# Non Peer-reviewed
Book						
Book chapter	5		1	1		
Article in research journal	1		1			
Other: – Book review – Manual – Reports – Working papers – Self-assessment tool – Conference proceedings		1		1 1 5		1 3 1

A6. Research outputs – Description of projects undertaken

Note: Research projects are colour keyed to indicate the cluster themes with which they are connected.
Cluster connections are also indicated by number in the left-hand column.

Colour Key
- Cluster 1
- Cluster 2
- Cluster 3
- Cluster 4
- Cluster 5

Project Unit/ Cluster, etc.	Project Title	Project Lead, Affiliation	Specific Project-Level Research Objectives	Expected Deliverables	Projected Start Date	Projected Delivery Date	Projected Expendi-tures ($)
Northern Ontario (1)	Community Resilience Sault Ste. Marie	Jude Ortiz (lead, Algoma Univ. College); Co-investigator: Linda Savory-Gordon (Algoma Univ. College)	- To complete a portrait of Sault Ste. Marie - To increase awareness of resilience - To improve planning processes to incorporate a holistic approach (multisector planning approach) - To network - To build links among northern Ontario communities - To share knowledge	- Report - Holistic planning approach - Increased awareness of resiliency - Conference presentation in Hearst	2006/ 2007	March 2009	$85,000/ year (x3)
Northern Ontario (5)	The Socioeconomic Impact of the Arts in the City of Sault Ste. Marie	Jude Ortiz (lead, Algoma Univ. College); Co-investigator: Gayle Broad (Algoma Univ. College)	- To increase awareness of the socioeconomic impact of the arts in the city of Sault Ste. Marie - To inform policy making	- Report/article	2006/ 2007	April 2007	$5,500
Northern Ontario (1)	"Buy Local Beef": Algoma Co-operative Beef Marketing Study	Cecilia Fernandez (lead, Algoma Univ. College); Co-investigators: Miranda Mayhew (Algoma Univ. College), Gayle Broad (Algoma Univ. College)	- To identify the demand for local beef (marketing study) - To create a marketing strategy - To increase awareness of local beef - To network - To share knowledge	- Leading a marking strategy - Increased sales of local beef - Increased awareness of the availability of local beef	2006/ 2007	July 2006	$32,000
Northern Ontario (1)	Recovery of the Collective Memory and Projection into the	José Reyes (lead, ASOPRICOR), Gayle Broad (Algoma Univ.	- To network - To build links between Canada and Colombia	- Journal articles - Chapter in book - Conference	2005/ 2006	2010	$100,000

	Future — ASOPRICOR	College)	- To share knowledge	presentations			
Northern Ontario (4)	Initiatives, pratiques et appuis au développement économique communautaire: la participation de l'économie sociale dans la construction des capacités des communautés francophones: Nord de l'Ontario, Manitoba, et Saskatchewan	Rachid Bagaoui (lead, Laurentian Univ.); Co-investigators: Christian Howald and Elisabeth Labrie (students, Laurentian Univ.)	- To provide a better understanding of the contribution to the social economy made by Francophones outside Quebec, in the provinces of Ontario, Manitoba, and Saskatchewan, identifying the regional differences and commonalities - To network - To build links between northern Ontario communities and communities in Manitoba and Saskatchewan - To share knowledge	- Journal article - Conference presentation	2006/ 2007	2009	$31,000
Northern Ontario (5)	Ontario Disability Support Program	Gayle Broad (lead, Algoma Univ. College); Co-investigator: Alison Drain (CCEDNet intern)	- To network - To share knowledge - To inform policy	- Article	2006/ 2007	March 2008	$10,000 internship
Northern Ontario (5)	Coalition of Algoma Passenger Trains	Linda Savory-Gordon (lead, Algoma Univ. College); Co-investigators: Bonnie Gaikezheyongai, Diane Merini, and Sharon Sayers (Algoma Univ. College)	- To network - To build links among northern Ontario communities - To build links among Aboriginal and non-Aboriginal communities - To share knowledge	- Influence policy - Report - Increase awareness of the importance of the train - Meetings with stakeholders	2006/ 2007	March 2008	$10,000 internship
Northern Ontario (1)	Garden River First Nation Performance of Hiawatha	Alice Corbiere (Algoma Univ. College), Margot Francis (formerly Algoma Univ. College, now Brock Univ.)	- To network - To increase cultural awareness - To share knowledge	- Performance of the play - Report	2006/ 2007	March 2007	$5,000
Northern Ontario (1)	Women and Community Economic Development in Northern Ontario	Gayle Broad (lead, (Algoma Univ. College), Rosalind Lockyer (PARO Centre for Women's Enterprise)	- To network - To build links among northern Ontario communities - To share knowledge - To increase awareness of women in CED	- Conference	2006/ 2007	2007	$2,000
Northern Ontario (1)	Community Supported Agriculture (CSA) Project	Cecilia Fernandez (lead, Algoma Univ. College); Co-investigator: Miranda Mayhew (Algoma Univ. College)	- To network - To build links among northern Ontario communities - To share knowledge - To increase awareness of local produce	- CSA tool (manual on how to start a CSA) - Meeting with stakeholders	2006/ 2007	March 2007	$2,000
Northern	Business Plan for	Gayle Broad (lead,	- To create a business plan and marketing	- Increased sales of local	2006/	2008	$37,000

Ontario (1)	Farmers	Algoma Univ. College); Co-investigators: David Thompson and Shannon Atkinson (students, Algoma Univ. College)	strategy - To network - To share knowledge	beef - Development of a business plan and marketing strategy	2007		
Manitoba (1)	Community Research Hub: A Case Study of Social Economy	Judith Harris (lead, formerly Menno Simons College, now Urban and Inner-City Studies, Univ. of Winnipeg); Co-investigators: Sandra Leone (Community Research Hub (CRH) Manager, Spence Neighbourhood Association (formerly Inonge Aliaga)), Joan Hay (House of Opportunities), and Brock Legge (student, Univ. of Winnipeg)	- To design training modules - To conduct training - To link workers to employers - To organize community learning circles - To monitor the work of CRH workers - To establish working relations with University of Winnipeg, Social Planning Council of Winnipeg, Canadian Centre for Policy Alternatives (Manitoba) - To interview residents - To conduct market survey - To evaluate social enterprise - To organize workshops on policy implications - To produce academic papers	- Market feasibility study (completed) - Business plan (final draft stage) - 3 part-time research jobs (focus groups conducted and submitted, survey, transcription) - Brochure - Web site (in-progress) - 6 modules prepared (8 planned) - Community learning circles (4 completed, 2 planned) - Resident interview questionnaire (to be submitted for ethics review) - General meetings of workers (2 completed) - Two academic papers - Two PowerPoint presentations: CRH and CRH and development - Two articles for popular community develop-ment periodicals - Final Evaluation and Report on CRH case study	August 2006	September 2007	$10,000 internship
Manitoba (5)	Building a Policy Frame-work for CED and the Social Economy	Brendan Reimer (Canadian CED network, Prairies); Co-investigators: John Loxley (Univ. of Manitoba) and Dan Simpson (student, Univ. of Manitoba)	- To identify policy priorities that will support the social economy sector in building stronger communities - To identify various effective strategies and models of policy advancement - To engage practitioners in developing a policy framework for the CED and social economy sector in Manitoba	- Recommendations for policy change to support the social economy - Comprehensive framework for policy development - Final project report for	November 2006	September 2007	$17,000 internship and commu-nity salary replace-ment

				website - Conference presenta- tions (national and local) - Published article in policy journal			

Manitoba (1)	Harvest Moon Society Marketing Cooperative: Building Social Capital through an Alternative Food Economy	Stephane McLachlan (Environment and Geography, Univ. of Manitoba); Co-investigators: Jo-Lene Gardiner (Harvest Moon Society) and Colin Anderson (student, Environment and Geography, Univ. of Manitoba)	- To identify how new generation co-operatives, and specifically those focused on local food systems, increase social cohesion and social capital both within the immediate marketing co-operative and among the diverse stakeholders represented in the food system. More specifically:
			- To describe group dynamics and the evolving nature of social cohesion and capital within this emerging rural social enterprise
			- To explore the role of social capital in local sustainable food systems
			- To evaluate the role agricultural co-operatives play in managing risk and adapting to BSE and future stressors
				- Literature review
				- Academic publications,
				- Conference papers
				- Communication tools:
				  1. Website Develop-ment, related to research and as a communication tool for HMS marketing group
				  2. Brochure describing research, best practices
				- Press releases, articles for local and regional newspapers and TV
				- Workshops at Harvest Moon Festival regard-ing local food, social enterprise development, sustainable agriculture
				- Master's thesis
					May 2007	March 2008	$17,000

Manitoba (5)	Building a Tax Policy Framework to Enable Co-operative Development	Cindy Coker (lead, SEED Winnipeg); Co-investigators: Chris Clamp (Southern New Hampshire Univ.), Monica Juarez Adeler (student, Centre for the Study of Co-operatives, Univ. of Sask.)	- To answer the question "what and how does tax policy enable co-operative development?" - To identify the appropriate tax policy that played a key role in individual co-op development and the growth of co-operative development and support organizations - To understand the various factors that contributed to the development and sustainability of co-operative organizations - To make recommendations to stakeholders (i.e., government and co-operative sector) - To share gained knowledge nationally	- Final report - National and local presentations - Policy position papers	September 2007	August 2008	$20,000
Manitoba (1)	Eat Where You Live: Building a Social	Joel Novek (lead, Dept. of Sociology, Univ. of	- To assess possibilities for improving local food security through the social economy	- 2-3 articles for academic journals	July 2007	September 2007	$13,100

	Economy of Local Food in Western Canada	Winnipeg); Co-investigators: Shirley Thompson (Natural Resources Institute, Univ. of Manitoba), Kim Bailey (Mount Carmel Clinic), Paul Chorney (Manitoba Food Charter), Cara Nichols and James Kornelson (students, Univ. of Manitoba)	with specific focus on Winnipeg and Saskatoon - To examine the obstacles faced by social enterprises and community organizations in the food sector - To offer means by which these obstacles may be overcome	and/or presentation at academic conferences - At least one masters thesis in city planning - Summary report of major findings designed for organizations involved in food security			
Saskatchewan (4)	Exploring the Social Economy in Saskatche-wan: Rural Area	Isobel Findlay (Edwards School of Business, Univ. of Sask./CUISR); Co-investigator: Lori Blondeau (student, Univ. of Sask.)	- To map the social economy in a rural area of Saskatchewan	- Clear identification of social economy actors - Report - Article - Presentations	May 2006	End of Summer 2006	$7,500 internship
Saskatchewan (4)	Exploring the Social Economy in Saskatche-wan: La Ronge	Isobel Findlay (Edwards School of Business, Univ. of Sask./CUISR); Co-investigator: Robert Dobrohoczki (student, Centre for the Study of Co-operatives, Univ. of Sask.)	- To map the social economy in a northern setting in Saskatchewan	- Clear identification of social economy actors - Report - Article - Presentations	May 2006	End of Summer 2006	$7,500 internship
Saskatchewan (4)	Exploring the Social Economy in Saskatche-wan: Saskatoon's Core Neighbourhoods	Isobel Findlay (Edwards School of Business, Univ. of Sask./CUISR); Co-investigator: Mitch Diamantopoulos (student, Centre for the Study of Co-operatives, Univ. of Sask.)	- To map the social economy in an urban setting in Saskatchewan	- Clear identification of social economy actors - Report - Article - Presentations	May 2006	End of Summer 2006	$7,500 internship
Saskatchewan (1)	Aboriginal Funding Database	Dwayne Docken (lead, Urban Aboriginal Strategy); Co-investigators: Cara Spence and Karen Lynch (researchers)	- To develop a database with Aboriginal funding available to the Aboriginal community	- Database posted at the Urban Aboriginal Strategy website - Final report posted at the UAS website and at CUISR's website	December 2006	March 2007	$15,000

Saskatchewan (1)	Evaluation of Saskatoon Urban Aboriginal Strategy: A Research Report	Dwayne Docken (lead, Urban Aboriginal Strategy); Co-investigator: Cara Spence (researcher)	- To review the administrative structure and processes established by the Urban Aboriginal Strategy Saskatoon project, and provide recommendations to assist in the future success of the UAS as it moves beyond the pilot stage	- Final report posted at the Urban Aboriginal Strategy website and at CUISR's website	January 2007	March 2007	$1,500
Saskatchewan (1)	Putting People First: Building a Framework for Accessible, Individualized Resources for People with Disabilities	Judy Hanna (lead, Saskatchewan Association for Community Living); Co-investigator: Karen Lynch (researcher)	- To identify various models of individualized funding (IF) and individually funded services (IFS) - To identify and addressing arguments against IF and IFS	- Clear understanding of IF and IFS models - Report posted at the Saskatchewan Association for Community Living website and at CUISR's website	December 2006	April 2007	$9,000
Saskatchewan (1)	Building Education and Training, Linkages and Leadership	Isobel Findlay (lead, Edwards School of Business, Univ. of Sask./ CUISR); Co-investigators: Arlene Bear (student, Univ. of Sask.) and Marie Prebushewscki (Thickwood Hills Business Learning Network)	- To identify key factors that contribute to the success of the Big River First Nation Co-operative Model - To engage artisans in a way that encourages their participation in the activities of the organization and assists them to see the organization as a place of learning and cultural revitalization - To understand how the traditional governance of the artisans can be integrated into the formal governance of the (co-operative) organization and vice versa	- Project to begin in 2007 - Research report - Additional outcomes to be determined	May 2007	End of October 2007	$5,000 internship
Saskatchewan (1)	Advancing the Co-operative Sector: Mapping Development Needs of Co-operatives in Emerging, Under-represented, and Struggling Sectors	Isobel Findlay (lead, Edwards School of Business, Univ. of Sask./ CUISR); Co-investigators: Michael Chartier (student, Centre for the Study of Co-operatives, Univ. of Sask.), April Bourgeois (community intern, St. Mary's Univ.), and Warren Crossman (Saskatchewan Co-operative Association)	- To identify specific development needs of co-operatives operating in emerging, under-represented, or struggling sectors - To provide the foundation for co-operative development communications plan	- Research report	May 2007	September /October 2007	$11,000
Saskatchewan (3)	The Northern Trappers Association: Moving Forward as a Co-operative Enterprise	Isobel Findlay (lead, Edwards School of Business, Univ. of Sask./CUISR); Co-	- To identify key factors that contribute to the success of organizations that have faced challenges similar to those currently confronting the Northern Saskatchewan	- Research report	May 2007	September /October 2007	$6,000

		investigators: Northern Trappers Association, Dwayne Pattison (student, Centre for the Study of Co-operatives, Univ. of Sask.)	Trappers Association				
Saskatchewan (1)	Pre-Apprenticeship Training and Work for Incarcerated Youth: Literature and Environ-mental Scan	Isobel Findlay (Edwards School of Business, Univ. of Sask./CUISR); Co-investigators: Gloria Lee (student, Univ. of Sask.), Darlene Lanceley (Saskatche-wan Indian Institute of Technologies), Dwayne Docken (Urban Aboriginal Strategy), and Verona Thibault (SEDA)	- To provide a literature review and environmental scan of existing programs and support services available to Aboriginal community members returning from incarceration in federal, provincial, and youth institutions; target services include existing community-based education/training programs and support services - To identify gaps in services to target group	- Research report	May 2007	September /October 2007	$5,000 internship
Cluster 1 — Social Enterprise Development	The Contribution of Disability-Controlled Co-operatives to the Social Economy	Brett Fairbairn (Dept. of History and Centre for the Study of Co-opera-tives, Univ. of Sask.) and Kathleen James-Cavan (Dept. of English, U of S); Co-investigator: Kama Soles (student, Centre for the Study of Co-operatives)	- To be determined as thesis research is refined	- Thesis - Presentations	September 2006	September 2008	$24,000
Cluster 2 — Measuring & Mapping the Social Eco-nomy	Assessing the Contributions of Co-operatives to Social Enterprise Development	Lou Hammond Ketilson (lead) and Roger Herman (Centre for the Study of Co-operatives, Univ. of Sask.); Co-investigators: Carol Hunter and Quintin Fox (Canadian Co-operative Association) and Juanita Bacsu (student, Univ. of Sask.)	- To examine the degree and type of support provided by credit unions and co-ops (outside of Quebec) to new and developing co-operatives and other forms of social enterprise in Canada	- Research report	September 2006	December 2007	$6,000
Cluster 2 —	Financing of the Social	Wanda Wuttunee	- Phase I — To gain a better understanding of	- Database of financing	January	October	$5,000

Financing Strategies for Social Enterprise Development	Economy	(Univ. of Manitoba)	the types of financing available to social enterprise organizations in Manitoba, Saskatchewan, and Northwestern Ontario	sources that support the social economy	2007	2007	internship
			- Phase II — To identify models of sustainable social economic organizations	- Add to the examples of successfully financed social economy orgs.	May 2007	November 2007	$6,000 internship
Cluster 3 — Governance of the Social Economy	Toolkit for Empowering Practices in Social Economy Governance and Planning	Brett Fairbairn (lead, Dept. of History and Centre for the Study of Co-operatives, Univ. of Sask.)	- To create a website of downloadable, free resources appropriate for use in organizational training - To provide research and specific models that achieve participation/inclusion/sense of community ownership - To provide an overview of best governance practices in conventional models (corporations, boards, etc.), and compare similarities and differences with the social economy - To review learnings from Quebec multistakeholder co-operatives - To provide tools for standards of good governance (self-assessment) - To define and map democratic values - To provide information for practical board training, board management, board-staff relations - To study cultural and governance barriers in governance planning created by language and socio-economic differences - To study the challenges in managing diversity	- Website with ready-to-use planning tools, participatory processes, checklists for governance tasks, etc. - Presentations - Case studies - Specially commissioned research papers designed to fill gaps in existing knowledge	2007	2010	$30,000 plus possibility of $10,000 in outside sponsorships and in-kind contributions
Cluster 3 — Governance of the Social Economy	Self-Assessment of Democratic Character in Organizations	Brett Fairbairn (lead, Dept. of History and Centre for the Study of Co-operatives, Univ. of Sask.)	- To develop a questionnaire intended to help social enterprises and other organizations analyse their democratic practices, with a view to recognizing what they do well and what they want to work on - To develop a practical way to understand and assess democratic character of organizations in the social economy - To produce a self-assessment questionnaire for use by organizations interested in democratic practice	- Self-assessment questionnaire for use by organizations - Database of shared results - Publications about the questionnaire, its development, patterns in the ways different types of organizations assess themselves, benchmarks for questionnaire results, and what these things show	2007	2009	Covered by outside sources and in-kind contributions

				about participants' ideas concerning democracy			
Cluster 3 — Governance of the Social Economy	Exploring Collaborative Governance Models	Brett Fairbairn (lead, Dept. of History and Centre for the Study of Co-operatives, Univ. of Sask.); Co-investigator: Robert Dobrohoczki (student, Centre for the Study of Co-operatives)	- To identify literature on collaborative governance models to consider how they operate within existing policy, how to move pilots into mainstream policy, and what are success factors (including epistemes and stakeholder relationships)	- Research report	May 2007	September /October 2007	$6,000
Cluster 4 — Measuring & Mapping the Social Eco-nomy	Measuring and Mapping the Impact of the Social Economy: Co-operatives	Rose Olfert (Univ. of Sask.), Mark Partridge (Ohio State Univ.); Co-investigator: Chipo Kangayi (student, Univ. of Sask.)	- To evaluate the impact of co-operatives on population change in the communities in which they are situated - To provide an understanding of how co-operatives vary spatially - To assess how the different types of co-operatives impact local communities - To provide the visual depiction of the incidence and impact of co-operatives	- National level maps of co-op incidence - Workshop presentations - Publishable project report	May 2006	September 2007	$29,000
Cluster 4 — Measuring & Mapping the Social Eco-nomy	Mapping Co-operatives and Credit Unions in Ontario	Collaborating with Southern Ontario Regional Node	- To conduct a census of co-ops and credit unions in Ontario	- Research report	Fall 2006	Summer 2007	Expenses covered by Southern Ontario node; in kind contribu-tions from our node
Cluster 4 — Measuring & Mapping the Social Eco-nomy	Mapping the Nature and Extent of the Social Economy in Aboriginal Communities	Lou Hammond Ketilson (lead, Centre for the Study of Co-operatives, Univ. of Sask.) and Gayle Broad (Algoma Univ. College)	- To document the types of social economy organizations in Northern Ontario, Manitoba, and Saskatchewan	- Case studies - Literature review and concept paper - Meta-analysis of case studies	January 2007	September 2009	$15,000
Cluster 5 — Developing Policy Frameworks for the Social Economy	Independent Health Care Organizations and Canada's Social Economy	Greg Marchildon (Univ. of Regina)	- To track the growth, decline, and public policy significance of key health care organizations and co-operatives in Saskatchewan and Manitoba	- Journal article - Conference paper	September 2006	Expected summer 2009	$8,000

Cluster 5 — Developing Policy Frameworks for the Social Economy	Social Economy Leadership: Lessons in Organizational Entrepreneurship and Government Partnership	Cristine de Clercy (Univ. of Western Ontario)	- To investigate what distinguishes sustainable policies from unsustainable ones - To study important inputs and institutions in social economy policy sustainability - To study how social economy groups challenge policy barriers and change them (as well as fail to change them) - To investigate how tax policy enables social economy development and how alternative tax policy options might foster social economy development	- Book - Journal article - Book chapter - Three conference papers - Public lecture - Two newspaper articles	August 2007	Expected fall 2009	$15,000
Cluster 5 — Developing Policy Frameworks for the Social Economy	The Promise and Potential of Worker Co-operatives in Canada	Co-Supervisors: L. Findlay and I. Findlay (Univ. of Sask.); PhD Student: Mitch Diaman-topoulos (Co-op Studies Concentration, Inter-disciplinary Program, Univ. of Sask.)	- To examine the policy framework for the development of worker co-ops in Canada	- Thesis - One academic conference presentation - One journal article	September 2006	September 2009	$15,000
Cluster 5 — Developing Policy Frameworks for the Social Economy	Re-engaging Citizens: Co-operatives as Public Policy Instruments for Democratic Renewal	Supervisor: I. Findlay (Univ. of Sask.); PhD Student: Rob Dobroho-czki (Co-op Studies Concentration, Inter-disciplinary Program, Univ. of Sask.)	- To build a policy framework for developing the social economy	- Thesis - Three academic conference presentations - One journal article	September 2006	September 2009	$30,000
Cluster 5 — Developing Policy Frameworks for the Social Economy	Adult Education and the Social Economy: Re-thinking the Communitarian Pedagogy of Watson Thomson	Supervisor: Howard Woodhouse (Univ. of Sask.); MA Student: Michael Chartier (Educational Foun-dations, Univ. of Sask.)	- To examine the historical role of adult education in promoting co-operative development	- Thesis - One academic conference presentation	September 2006	December 2007	$12,000