



## SOCIAL ECONOMY SUITE PROGRAM MID-TERM REPORT

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*Submitted by  
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March 2008*

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

*The Northern Ontario, Manitoba, and Saskatchewan  
Regional Node of the Social Economy Suite*



Social Sciences and Humanities  
Research Council of Canada

Conseil de recherches en  
sciences humaines du Canada

Canada 

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## SOCIAL ECONOMY SUITE PROGRAM MID-TERM REPORT

| Identification                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                  |                          |                                             |                            |                          |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
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| File number<br>859-2005-0007                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Name of the National Hub or regional node<br><i>Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies, and Sustainable Communities / Réseaux, connaissances, synergies: entreprises sociales, économies intelligentes, et communautés durables</i><br><br><b>Northern Ontario, Manitoba, and Saskatchewan Regional Node</b> |                          |                                             |                            |                          |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
| Contact Person (Hub or node's director) :                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                  |                          |                                             |                            |                          |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
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| Date Submitted (dd/mm/yy)<br>March 3, 2008                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                  | Signature                |                                             |                            |                          |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
| COMMUNITY-UNIVERSITY Partnership                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                  |                          |                                             |                            |                          |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
| <p>1. What proportion of partnership's members (partners, researchers, contributors, etc.) have full access (i.e., unrestricted) to the National Hub or regional node's infrastructure and support?</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 16.6%;">Less than<br/>10%</th> <th style="width: 16.6%;">10-25%</th> <th style="width: 16.6%;">25-50%</th> <th style="width: 16.6%;">50-75%</th> <th style="width: 16.6%;">75-90%</th> <th style="width: 16.6%;">90% or<br/>more</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">X<input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <p><b>Note:</b> "Full access" has been interpreted as access at any point, to the overall project as well as to the individual projects. We consider our project to fall at the low end of the indicated range.</p> <p>2. Which of the following hindrance factors have been experienced by the governance structure to date? (check all that apply)</p> <ul style="list-style-type: none"> <li>X <input type="checkbox"/> Student recruitment</li> <li><input type="checkbox"/> Availability of/access to data</li> <li>X <input type="checkbox"/> Insufficient complementary funding</li> <li><input type="checkbox"/> Ethics approval</li> <li>X <input type="checkbox"/> Insufficient institutional support</li> <li><input type="checkbox"/> Obtaining licences, permits, visas</li> <li><input type="checkbox"/> Partnership negotiation</li> <li>X <input type="checkbox"/> Physical / material resources (e.g., office space)</li> <li>X <input type="checkbox"/> Lack of qualified personnel</li> <li>X <input type="checkbox"/> Research Time Stipend (SSHRC)</li> <li>X <input type="checkbox"/> Insufficient SSHRC funding</li> <li>X <input type="checkbox"/> Team collaboration</li> <li>X <input type="checkbox"/> Other(s) - Please specify: see a) – d) below</li> </ul> <ul style="list-style-type: none"> <li>a) No additional research project funding allocated to provincial organizations other than funds to support student researchers</li> <li>b) Lack of sufficient community release funds for community partner involvement</li> <li>c) Institutional leadership needed for community-based research</li> <li>d) Too much reporting required</li> </ul> |                                                                                                                                                                                                                                                                                                                                                  |                          |                                             |                            |                          | Less than<br>10% | 10-25% | 25-50% | 50-75% | 75-90% | 90% or<br>more | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | X <input type="checkbox"/> | <input type="checkbox"/> |
| Less than<br>10%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 10-25%                                                                                                                                                                                                                                                                                                                                           | 25-50%                   | 50-75%                                      | 75-90%                     | 90% or<br>more           |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                         | <input type="checkbox"/> | <input type="checkbox"/>                    | X <input type="checkbox"/> | <input type="checkbox"/> |                  |        |        |        |        |                |                          |                          |                          |                          |                            |                          |



3. Has the partnership led to the creation of new mechanisms within participating universities to enhance responsiveness to communities' research questions?

- X  Yes (go to 3b.)
- No

3b. Identify the types of mechanisms the National Hub or regional node has helped to create (e.g., formal interorganizational links, cross memberships/ appointments, supervisory status outside university, standing working groups, etc.).

The regional node has forged new relationships among universities in the three provinces covered by the node and established a formal interorganizational link through the project's governance system (see appendix 5).

The research clusters model has established formal working groups focused on specific sub-themes of the overall research program (see appendix 5).

Within each province, funds in support of annual provincial workshops have facilitated opportunities for community partners to meet with academics to plan, implement, and disseminate research.

In part, the partnership has contributed to the establishment of a new community-based research institute —NORDIK — at Algoma University College.

The partnership has built on existing research infrastructure and contributed to the extended life of two established CURAs, the Winnipeg Inner-City Research Alliance (WIRA, U of W) and the Community-University Institute for Social Research (CUISR, U of S).

Formal partnership agreements have been developed and implemented by university-based units such as the Community Economic and Social Development Unit (CESD) at Algoma University (and their research unit, NORDIK), WIRA, and CUISR, with each community organization participating in a Linking, Learning, Leveraging funded research project (see appendix 6).

4. How has the level of appreciation among community organizations changed in relation to the value/importance of research since their involvement with the National Hub or regional node?

| Significant decrease in level of appreciation | Moderate decrease        | Same                     | Moderate increase        | Significant increase in level of appreciation |
|-----------------------------------------------|--------------------------|--------------------------|--------------------------|-----------------------------------------------|
| <input type="checkbox"/>                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | X <input type="checkbox"/>                    |

**Note:** The level of appreciation is linked to the previous experiences of community partners in working with university researchers. Those working with the newly established NORDIK research institute have experienced a significant increase in the level of appreciation because many of them had never worked with a university partner before, or, if they had, their previous experience had been negative. Those community partners working with WIRA and CUISR had established relationships which continued to grow in appreciation, in particular as the community groups saw the results from the research process and saw benefits to their organizations through the application of the research results.

5. Knowledge Mobilization Staff: Indicate the total number of staff (student and non-student) that were hired for knowledge mobilization purposes to date (e.g., research coordinator, staff for dissemination activities, webmaster etc...)?

The project administrator is a full-time staff member at the Centre for the Study of Co-operatives, U of S. Approximately 60 percent of her time is dedicated to research coordination, knowledge mobilization, and webmaster activities (assisted by a part-time IT staff member who spends 50 percent of his time on LLL website needs). The centre's publications officer contributes about 30 percent of her time to editing, as well as the production of newsletters and other project publications. The centre's staff person responsible for co-



ordinating outreach and engagement activities devotes 20 percent of his time to LLL activities, such as planning and co-ordinating the week-long social economy conference held in Saskatoon May 2007 in conjunction with the Congress of Humanities and Social Sciences.

Funds have been provided to each of the three provincial partner organizations — the Community Economic and Social Development Unit at Algoma UC, the Winnipeg Inner-City Research Alliance (U of W), and the Community-University Institute for Social Research (U of S) — to pay for staff time to carry out knowledge mobilization activities. CESD has employed 5 students who have contributed part of their internship time as well as 2 IT staff at the university. A staff member at WIRA contributes about 25 percent of her time to knowledge mobilization and webmaster activities. A staff member at CUISR devotes 30 percent of her time to project co-ordination and dissemination activities.

6. In general, do the community organizations involved in the National Hub or regional node intend to continue involvement in research once the period of the grant is terminated?

| Unlikely                 | Possibly                 | Likely                              | Definitely               | Unknown                  |
|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Note:** This is a difficult question to answer. We anticipate that many will continue to be involved in research due to the positive relationships that have been developed and the value of the research produced. Many of our community partners have been working with the four lead provincially-based organizations (CESD, WIRA, CUISR, and the Centre for the Study of Co-operatives) for a long period of time and readily partner with new research initiatives when there is immediate relevance identified in the planned research activities. Their decision to partner is also aided if there are research funds available to support their participation as well as to implement the research.

### RESEARCH AND KNOWLEDGE MOBILIZATION TRAINING

1. Students and Postdoctoral Researchers: Indicate the total number of students and postdoctoral researchers (both paid and unpaid) that have been participating in the National Hub or regional node's activities to date.

| <b>Paid</b>   | <b># Canadian</b> | <b># Foreign</b> |
|---------------|-------------------|------------------|
| Undergraduate | 15                | 2                |
| Masters       | 18                | 3                |
| Doctoral      | 7                 | 2                |
| Postdoctoral  | 1                 | 0                |
| <b>Unpaid</b> | <b># Canadian</b> | <b># Foreign</b> |
| Undergraduate | 0                 | 0                |
| Masters       | 3                 | 0                |
| Doctoral      | 1                 | 1                |
| Postdoctoral  | 0                 | 0                |

2. Indicate the number of research staff who are participating in the Canadian Social Economy Hub or regional node.

See appendix 1.

3. If available, append a list of thesis or postdoctoral research projects that have been or will be produced following the students or researchers' involvement in the National Hub or regional node's research activities.

See appendix 2.



4. What type of research skills have students and research staff acquired through the National Hub or regional node? (Check all that apply):

- X  Data collection
- X  Data entry
- X  Data analysis
- X  Computer skills (use of specialized software)
- X  Proposal writing / preparation
- X  Research planning
- X  Report writing
- X  Publication experience
- X  Opportunity for thesis work
- X  Other(s) - Please specify. See a) to d) below.

- a) Community-based research methods, Participatory Action Research methods
- b) Developing marketing and business plans for social enterprises
- c) Working with GIS technology to construct maps that locate co-operatives in Canada
- d) Learning to work under pressure and manage tasks concurrently

5. Explain how the involvement of participants in the research activities of the National Hub or node has improved their collaborative research skills?

In many projects we have provided direct research training to participants including identifying research questions in a collaborative manner; conducting data collection; analysis; and report writing.

Participation in the research has, for a number of the students, proven a major opportunity to build relationships and capacity, to expand their understanding of Canada's diversity, to negotiate some of the barriers to effective engagement of all stakeholders, and to come to know and respect different communities (Aboriginal and abilities most conspicuously). One student has been transformed by his immersion in the Aboriginal community; another spoke to the intellectual and social enrichment associated with working with personnel at the Saskatchewan Co-operative Association who introduced him to a diverse range of emergent, struggling, and other co-operatives. Yet another has commented on how useful his highly theoretical training in law, politics, and governance issues has proven to grassroots organizations seeking his advice. It is important to note that the research projects have benefited from the enormous professional and academic experience a number of the mature students have brought to the research, which has facilitated the collaborations.

Some specific examples illustrate these points.

**Harvest Moon Project** — Community partners have been involved in all steps of the research process, thus facilitating a hands-on approach to learning research skills. Celia Guilford and Jo-Lene Gardiner in particular have been involved extensively in the research design and data collection, and will be involved in data analysis. Jo-Lene's participation on Colin Anderson's thesis advisory committee will allow her to become more familiar with the academic/graduate research process. As this project is grounded in a participatory action research methodology, Colin Anderson has used a collaborative research approach to his thesis, working closely with the farmer members of the Harvest Moon Society (HMS). In this role, he has gained skills in meeting and focus group facilitation, interviewing, data analysis, proposal writing, videography and more.

**Community Research Hub** — Research is the focus of the 6 training modules that we have developed. Community participants are conducting focus groups, door-to-door surveying, community consultations, and transcriptions.

**Eat Where You Live** — The basic vision for the Eat Where You Live project is one of active participant observation. The academic partners to the research — Cara Nichols, James Kornelsen, and Joel Novek — will invest their time, effort, and skills to assist the community partners, Manitoba Food Charter and Mount Carmel Clinic, in mutually-agreed-upon endeavours. In return, the academic partners will gain valuable information for coursework, theses, academic presentations, and publications. These reports and publications can then be drawn



upon by the community partners and other social enterprises and community organizations to evaluate their operations, assess future courses of action, and make decisions.

Student placement requires careful planning and co-operation. Cara works with Mount Carmel Clinic to manage its community garden and assess its effectiveness. This meets not only Mount Carmel's needs but will also furnish Cara with material for her MA thesis in Urban Planning.

James is working with the Community Economic Development Society from Knox United Church, which is developing the Central Park Market concept in downtown Winnipeg, a project suggested by our community partner the Manitoba Food Charter. James is engaged with a number of social enterprises in addition to Knox Community Development, including Earthshare, CCEDNet, and Manitoba Farmers' Markets. Both James and Cara are gaining valuable skills in community capacity building. Since James is only in his first year of graduate studies at the Natural Resources Institute, U of M, it is not yet certain that this work will lead to an MA thesis, though this is to be hoped for.

Joel Novek, as principal investigator, is facilitating the collaboration between the student interns and the community partners. As his contribution, he is serving on the Research and Policy Committee of the Manitoba Food Charter. He is also responsible for supervising the work of the student interns, developing academic presentations and publications, and communicating research results to the community partners.

**Penokean Hills Farms** —The farmer members of Penokean Hills Farms worked in partnership with student intern Alicia Mills for the past year to develop a marketing plan. She feels she has better sense of what's going on in the community, and through her involvement with the project has acquired community development, marketing, and networking skills. She has also strengthened her public speaking skills and her ability to share what's going on in the community with others.

From the farmers' perspective, the work on this project has created opportunities for collaboration with farmers across the region and beyond. The beef marketing project has been helping those groups with their programs and they've been working together. Information is being shared through the Ontario Cattlemen's Business with other producers in Ontario and Alberta, and groups in Manitoba are also looking to this project for inspiration.

The project has facilitated educational and work experience for students, community partners, and academics. There has been a great expansion of knowledge for many people at different levels. Last May, a Colombian delegation from Asiprocor visited to learn about this project and indicated the experience was excellent for knowledge sharing and creating a global connection.

**Community Resilience and the Arts** — The final research report was presented to the Arts Council; the report has been endorsed by several other groups and is being presented to city council for its endorsement. There is now a much better understanding within the community leadership about the connection between culture and the economy. The research has produced documentation that the arts community can use to move forward and use a basis for funding leverage. The experience of participating in the research has revitalized the arts association and, thereby, the arts community and, ultimately, the whole community. The research has provided the Arts Council with something around which to crystallize their planning and has contributed to a community building process.

**The Artisan Cooperative of Big River First Nation** is responding to the need of communities to establish business enterprises to create income and build capacity within the artisan community. This study will identify key factors that contribute to the success of organizations that face challenges. Some of the main issues identified include: developing policies and practices that encourage transparency and accountability; mobilizing membership participation; improving communication channels among the various stakeholders; and integrating the traditional values of the artisans into a co-operative organization. Special efforts will be made to engage the membership in a way that encourages their participation in the organization's activities so members see the organization as a place of learning and cultural revitalization.



6. Explain how the activities of the National Hub or the regional node contribute to the development of curriculum and / or other types of training programs?

Across the region the LLL community partners and academics have been actively transforming research output into curriculum and other types of training activities. Faculty have incorporated the findings of their research as well as aspects of methodology into existing courses. Their project work has allowed them to bring practical experience into the classroom, an important aspect of curriculum development. Students have used the reports in class papers, thereby gaining knowledge of the social economy. Students directly involved in project research have enhanced their knowledge and gained skills relevant to obtaining long-term employment. The following specific examples illustrate a range of activities.

**Northern Ontario**

- Community Economic and Social Development Program, Algoma University College — Qualitative methods courses in both the CESD and Sociology departments at Algoma are being adjusted to reflect new methodological learnings in community-based research. These courses will also reflect the experience gained in working with Indigenous communities. The CESD courses, including field placement courses, will also reflect the learnings gained from working with community groups and extending the social economy in the region and internationally.
- CESD 3907 — CESD and Co-operatives was offered in June 2007. The curriculum for this course was designed by a member of one of the partners in the Social Economy project, OnCoop. One of the students is now using that experience to teach a college-level course in co-operatives at Northern College in Timmins.
- CESD, in partnership with CCEDNet, developed and delivered a train-the-trainer workshop in Feb 08 that included an introduction to the social economy and showcased the results of several LLL research projects. Sixty participants joined in-person and on-line.

**Manitoba**

- University of Winnipeg — Research from the project will contribute a module on social economy, social enterprise, and co-operatives to course content for 60.3110/3: Poverty-Focussed Development in the International Studies Program.
- Community Research Hub — will eventually have 8 training modules. Participants are also receiving training in co-operative development.
- Eat Where You Live — The WIRA/LLL activities have already been incorporated into two University of Winnipeg sociology courses, 50.2109/3: Social Policy and 50.2502/3: Sociology of the Environment. Both courses have gained a new emphasis on food security issues and have encouraged students to conduct research in partnership with local community organizations working in this area.
- The Richardson College of the Environment is a recent initiative at the University of Winnipeg that could contribute to trans-disciplinary curriculum development in the area of food studies. The university is hosting a conference on local food security in March that could be a significant step in this direction. The principal investigator for this project serves on the selection committee for the principal of Richardson College and hopes to ensure that curricular development in this field will be one of his/her priorities.
- Harvest Moon Research Project — A number of training and curriculum development activities were or are in the process of being developed.
  - Boys and Girls Clubs of Winnipeg Youth for ECO Action: Farm Tour Youth Exchange — This educational exchange took place 10–12 August 2007 and was designed to facilitate a better understanding between urban and rural youth. Activities included farm tours, gardening, and learning more about livestock. Activities were planned around food and food preparation to give the youth an appreciation of where their food comes from. Plans are underway to make this an annual event with the future possibility of rural youth traveling to Winnipeg to interact with the Boys and Girls Clubs in an urban setting.
  - Farmer Workshops — A planned series of workshops to increase knowledge and skill sets around local food production, marketing, distribution, and consumption.



- Harvest Moon Society Experiential Learning Curriculum —Jo-Lene Gardiner, Celia Guilford, Colin Anderson, and other members of HMS have drafted a proposal to develop experiential agro-environmental education based out of the Harvest Moon Society. This curriculum would be designed to engage the local school division in a collaborative community/school division curriculum development project.
- Workshops at the Harvest Moon Festival 21 and 23 September 2007. Colin Anderson chaired the education committee for the festival, and working with the Harvest Moon Local Food Initiative, planned and organized 12 workshops on local food, community development, and rural culture; activities also included youth-specific sessions and one farm tour. Over 280 individuals participated.
- Tax Policy Research Project —This research will be useful for structuring future funding for the co-op sector. Results to date indicate that the research will support the importance of future funding for training and technical assistance programs and provide models for funding for co-op organizations.

**Saskatchewan**

- In May 2007, project personnel developed and offered the first in a series of one-day Graduate Student Workshops for students studying the social economy; the focus was on conducting community-based research. The workshop was part of a week-long program of activities focused on the social economy in conjunction with the Congress for the Humanities and Social Sciences.
- Comm 300.3: Business Communications II — a newly offered core class that includes a section on communications planning for social enterprises
- InterD 898.3: Co-operatives and Sustainable Development, Co-operative Studies Concentration, Interdisciplinary Graduate Program, University of Saskatchewan. The course is being offered this term.
- Aboriginal Economic Development, Concentration in Indigenous Management, MBA program, Edwards School of Business, University of Saskatchewan.
- Research has contributed to expanded training materials and seminars offered by CUISR. We have developed a package of orientation materials for interns and delivered a series of workshops and seminars.

**RESEARCH AND KNOWLEDGE PRODUCTION**

1. Provide a brief overview of the way in which the research team is organized as well as a detailed description of research projects.

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

Recognizing the importance of accessibility, we 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 clusters within the 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 them 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, academic and community partners work closely with 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 research proposals and to find students 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 held in February 2007.

Detailed information regarding project titles, leads, objectives, deliverables, and deadlines are provided in appendix 3. Research projects are identified by provincial and cluster affiliation. They have also been numbered sequentially and assigned project numbers for future reference.

See appendix 3.

2. Research Publications: Indicate the total number of peer-reviewed and non peer-reviewed research publications that have been completed by the regional node to date.

| Publication Type                   | # Submitted     |                     | # Accepted for publication |                     | # Published     |                     |
|------------------------------------|-----------------|---------------------|----------------------------|---------------------|-----------------|---------------------|
|                                    | # Peer-reviewed | # Non Peer-reviewed | # Peer-reviewed            | # Non Peer-reviewed | # Peer-reviewed | # Non Peer-reviewed |
| <b>Book</b>                        |                 |                     |                            | 1                   |                 |                     |
| <b>Book Chapter</b>                |                 | 3                   | 2                          | 1                   |                 |                     |
| <b>Article in Research Journal</b> | 2               |                     | 2                          |                     |                 |                     |
| <b>Other:</b>                      |                 |                     |                            |                     |                 |                     |
| Book review                        |                 |                     |                            | 1                   |                 |                     |
| Manual                             |                 |                     |                            | 1                   |                 | 1                   |
| Research Reports                   |                 | 1                   |                            | 1                   |                 | 8                   |
| Working papers                     |                 | 1                   |                            |                     |                 | 3                   |
| Self-assessment tool               |                 |                     |                            |                     |                 | 1                   |
| Conference proceedings             |                 |                     |                            |                     |                 | 1                   |
| Video                              |                 |                     |                            |                     |                 | 1                   |
| Web publications                   |                 |                     |                            |                     |                 | 3                   |
| Case studies                       |                 |                     |                            |                     |                 | 4                   |

3. Append a list of publications sorted by peer reviewed and non peer-reviewed publications and clearly indicate the type of publication (e.g., book, book chapter, article) and their status (i.e., submitted; accepted for publication; published).

See appendix 4.



### DISSEMINATION OF RESEARCH RESULTS

1. Use the table below to indicate the number of knowledge dissemination mechanisms/tools/vehicles the team has already developed (D) or plans to develop (P). Also indicate whether the events are aimed at primarily academic or primarily non-academic audiences, or both.

| Contribution Type                                                                                                                                                                                    | # Aimed at academic audiences |    | # Aimed at non-academic audiences |   | # Aimed at both academic and non-academic audiences |                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|----|-----------------------------------|---|-----------------------------------------------------|-------------------|
|                                                                                                                                                                                                      | D                             | P  | D                                 | P | D                                                   | P                 |
| Advisory services                                                                                                                                                                                    |                               |    |                                   |   | 3                                                   | 2                 |
| Article in popular media                                                                                                                                                                             |                               |    | 1                                 |   |                                                     | 7                 |
| Article in Professional or trade journal                                                                                                                                                             | 4                             | 11 |                                   |   |                                                     | 5                 |
| Conference paper                                                                                                                                                                                     | 19                            | 7  | 14                                | 6 | 44                                                  | 11                |
| Conference proceedings                                                                                                                                                                               |                               | 1  |                                   |   |                                                     | 3                 |
| Consultancy                                                                                                                                                                                          |                               |    | 2 units, multiple times           |   |                                                     |                   |
| Creative work                                                                                                                                                                                        |                               |    |                                   |   | 1                                                   |                   |
| Database/dataset/archive                                                                                                                                                                             |                               |    |                                   |   | 1                                                   | 1                 |
| Development of policies and programs                                                                                                                                                                 | 2                             | 2  |                                   |   |                                                     |                   |
| Educational aid                                                                                                                                                                                      |                               |    |                                   |   | 2                                                   | 5                 |
| Medias (e.g., interview, etc.)                                                                                                                                                                       |                               |    |                                   |   | 5                                                   | 15                |
| Newsletter/press release/pamphlet                                                                                                                                                                    |                               |    |                                   |   | 6                                                   | 5                 |
| Public lecture or address                                                                                                                                                                            | 1                             |    | 2                                 |   | 6                                                   | 4                 |
| Radio broadcast                                                                                                                                                                                      |                               |    |                                   |   | 1                                                   |                   |
| Reports                                                                                                                                                                                              | 1                             |    |                                   |   | 6                                                   | 43                |
| Television broadcast                                                                                                                                                                                 |                               |    |                                   |   |                                                     |                   |
| Textbook                                                                                                                                                                                             |                               |    |                                   |   | 1                                                   | 3                 |
| Thesis                                                                                                                                                                                               |                               |    |                                   |   | 1                                                   | 12                |
| Web site                                                                                                                                                                                             |                               |    |                                   |   | 3                                                   |                   |
| Other(s) - Please specify:<br>- media products<br>- audio-visual material<br>-new courses<br>-Brown Bag Luncheons<br>- OISE webcast<br>- CSEHub telelearning web-conference<br>-Poster presentations | 2                             | 3  |                                   |   | 1<br>2<br>3<br>1                                    | 10<br>5<br>8<br>1 |
| Presentations to Government:<br>-- Municipal<br>-- Provincial                                                                                                                                        | 2                             |    | 3                                 |   |                                                     | 5<br>4            |



2. Use the table below to indicate the number of knowledge-dissemination events that have already been held (H) or that you plan to hold (P). Also indicate whether the events are aimed at primarily academic audiences or primarily non-academic audiences, or both.

| 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                             | 4 |                                   | 2 | 8                                                   | 7 |
| Conference                                                                |                               |   |                                   |   | 1                                                   | 1 |
| Congress                                                                  |                               |   |                                   |   |                                                     |   |
| Symposium                                                                 |                               |   |                                   |   | 2                                                   |   |
| Meeting                                                                   | 1                             |   | 63                                |   | 5                                                   |   |
| Other(s) - Please specify:<br>-broadcast<br>-workshop<br>-Training events | 1                             |   | 1<br>2                            |   | 1                                                   |   |

3. Knowledge Mobilization Audiences: Who are the main audiences of the National Hub and regional node's knowledge mobilization efforts? Please check all that apply, then priority rank the top three identified audiences (#1, #2 and #3).

| Audience                                                                 | Rank |
|--------------------------------------------------------------------------|------|
| <input checked="" type="checkbox"/> Academic and Other Experts           |      |
| <input type="checkbox"/> Administrators                                  |      |
| <input checked="" type="checkbox"/> Community Groups                     |      |
| <input checked="" type="checkbox"/> Community Leaders                    |      |
| <input checked="" type="checkbox"/> Decision-Makers                      |      |
| <input checked="" type="checkbox"/> Federal Government                   |      |
| <input checked="" type="checkbox"/> General Public                       |      |
| <input type="checkbox"/> International Intergovernmental Body            |      |
| <input checked="" type="checkbox"/> International Organization           |      |
| <input checked="" type="checkbox"/> International Research Communities   |      |
| <input checked="" type="checkbox"/> Learned Societies (discipline-based) |      |
| <input type="checkbox"/> Libraries, Museums, Archives                    |      |
| <input checked="" type="checkbox"/> Municipal Government                 |      |
| <input checked="" type="checkbox"/> Non-Profit Organizations             |      |
| <input checked="" type="checkbox"/> Policy-Makers                        | 3    |
| <input type="checkbox"/> Private Sector                                  |      |
| <input checked="" type="checkbox"/> Professionals/Practitioners          | 1    |
| <input checked="" type="checkbox"/> Provincial Government                |      |
| <input checked="" type="checkbox"/> Students: Undergrad & Graduate       | 2    |
| <input type="checkbox"/> Unions                                          |      |
| <input checked="" type="checkbox"/> Universities                         |      |
| <input type="checkbox"/> Foreign Government                              |      |
| <input type="checkbox"/> Informed Public                                 |      |
| <input checked="" type="checkbox"/> Media                                |      |

## Personalized Mid-Term Report

### Section I. One-Page Summary

The goal of the Linking, Learning, Leveraging 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 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?

These are addressed in five research clusters: 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. 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) and 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.

In addition to our provincial partner organizations, we are joined in our efforts by representatives from 10 co-operative organizations, national, provincial, and local; 38 nonprofit organizations; as well as representatives from federal (2), provincial (5), and municipal (2) levels of government. Thirty-six faculty from 19 universities and 6 associated research centres join 57 community partners to plan, implement, and disseminate the research.

The anticipated outcomes will include published books, journal articles, conference papers, monographs, tool kits and manuals, students trained in community-based research, increased research and organizational capacity of community partners, and refinement and changes in local, provincial, and national policies.

See Appendix 5 for a breakdown of partners by category and Appendix 6 for a complete list of partners.

## **Section II. Community-University Alliance**

### **Research Overview and Objectives**

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 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?

These are addressed in five research clusters: 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. 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) and 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. There have been no departures from the node’s objectives as set out originally in the formal application.

### **Management and Governance Structure**

The management and governance model for the Linking, Learning, Leveraging project is intended to create a decentralized, responsive, transparent, representative, and accountable decision-making structure. Community participation is key to the success of the project.

See Appendix 8 for a complete list of management board and advisory committee members, as well as a graphic depiction of the governance structure.

#### *The Governance Model*

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. The board is responsible for setting policy and direction for the overall project, taking into consideration input from the project’s Advisory Council. The regional

node project administrator is a nonvoting member of the Management Board, which meets in person a minimum of once per year and approximately every three months by conference call. See Appendix 12 for a list of Management Board meetings.

### *The Management Model*

The Northern Ontario, Manitoba, and Saskatchewan node operates under a decentralized management model, with decisions regarding research activities and the allocation of funds administered at three levels.

1. At the provincial level — by designated organizations in each of the three provinces, including CUISR and the University of Saskatchewan in Saskatoon; WIRA and the University of Winnipeg in Winnipeg; and the CESD Unit at Algoma University College in Sault Ste. Marie. Each provincial organization has a co-management model, with one person responsible for academic leadership and liaison and another for community leadership and liaison. 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. Proposals are adjudicated in WIRA by a community-led executive committee and in CUISR by an advisory committee comprised of academics and community representatives. CESD develops targeted research projects in consultation with the Northern Ontario academics, government and community organizations, and individuals who are partners in the project.
2. At the cluster or research theme Level — by community and academic co-leads. The clusters are comprised of community and academic partners from across the node's region, as well as from outside, who work in close collaboration with the members of the research cluster to make decisions regarding research priorities and the allocation of resources. The academic co-leads have academic expertise consistent with the cluster's research focus and provide 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, they may provide administrative leadership as well.
3. Overall — 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. To assist her in this role, the P.I. has retained central 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 central 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.

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.

**Note:** There has been a change to one of the cluster co-leads. Dr. Brett Fairbairn, academic co-lead for the Governance Cluster has stepped down from this leadership role to assume the position of Provost and Academic Vice-President at the University of Saskatchewan. He will continue his involvement in the project through the completion of his recently awarded SSHRC Standard Research Grants, “Cognition and Governance in the Social Economy.” Academic leadership of the cluster has been assumed by Dr. Murray Fulton, Bioresource Policy, Business and Economics Department, University of Saskatchewan.

### **Developing Capacity to Work Together**

Our project is fortunate to have the accumulated experience of two successful CURAs associated with its network of researchers. We were able to build on the foundation of existing research networks and to work with existing protocols developed over the life of the previous CURAs and have used this experience to avoid some of the pitfalls and challenges that CUISR and WIRA experienced in their developmental years.

Project participants (co-applicants, collaborators, and partners) are invited to regional symposia and provincial workshops to share ideas, provide feedback on planned and completed research, set research priorities, and signal interest in participating in or initiating a research project. The proposal initially included two region-wide conferences or symposia, and annual provincial-level workshops. The Management Board decided to add a third regional symposium to facilitate network development and knowledge dissemination. Each of these gatherings — regional and provincial — is intended to facilitate the ongoing research planning, implementation, feedback and analysis, and dissemination process occurring within and among clusters.

Partner organizations are offering the time of senior management, board volunteers, and research and marketing staff as in-kind contributions to the project. These sector 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 fora provide mechanisms to maintain communication among all participants and to continue to integrate input. Within the clusters, Internet and telephone conferences and the discussion fora are the primary means through which research can be planned and implemented.

The third regional symposium is planned for the fourth year of the node’s work. This event will include presentation of the research outcomes from all clusters within the project, as well as research sponsored at the provincial level.

### **Impact of Linking, Learning, Leveraging Activities**

Some of the following points were mentioned in the first section of the Mid-Term Report, but are further elaborated here.

The regional node has forged new relationships among universities in the three provinces covered by the node and has established a formal inter-organizational link through the project’s

governance system. Similarly, the research clusters model has established formal working groups focused on specific sub-themes of the overall research program. Frequent interaction between community and academic partners facilitated by the project management process has increased the level of understanding between university and community organizations and has provided increased opportunities for cross-provincial research and communication.

Within each province, funds in support of annual provincial workshops have facilitated opportunities for community partners to meet with academics to plan, implement, and disseminate research. Each successful research experience reinforces the willingness to participate again. We have seen repeat applications for funding from community partners, and a demonstrated willingness to participate in subsequent research initiatives.

The partnership has contributed to the establishment of a new community-based research institute, NORDIK, at Algoma University College. Further, as noted above, the partnership has built on existing research infrastructure and contributed to the extended life of two established CURAs — WIRA in Winnipeg and CUISR in Saskatoon. The University of Saskatchewan's 2008–2011 Strategic Plan includes the proposed creation of a Centre for Community-Based Research, which signals the university's commitment to community-based research activities and recognizes the accomplishments of both CUISR and the Centre for the Study of Co-operatives.

Formal partnership agreements have been developed and implemented by university-based units such as CESD at Algoma University (and their research unit, NORDIK), WIRA, and CUISR, with each community organization participating in a Linking, Learning, Leveraging funded research project (see Appendix 9). These protocols set a standard for conducting community-based research that will be incorporated in the new U of S Centre.

### **Actions Taken to Address Issues Raised by the Adjudication Committee**

The Linking, Learning, Leveraging team is pleased that the committee judged the proposal meritorious. We accepted as additional guidelines the several suggestions and minor reservations expressed by the committee. Specific actions planned or already addressed by the project are described below, following each item identified by the committee.

1. The governance protocol should be more specific.  
Please see Appendix 8 for a detailed description of the model that has been implemented to govern this project.
2. The evaluation framework should be more specific.  
Evaluation procedures have been identified in detail in the text of the Milestone Report (Appendix 7). Section 7 of that report describes the formal evaluation process planned for the end of year three of the project.
3. The project team requires better representation from the Northern Ontario region.  
The academic director for Northern Ontario and co-lead of cluster 1, Dr. Gayle Broad, has made significant progress in enlarging the network of Northern Ontario community partners and academics associated with the project. A workshop held in April 2006 brought together more than 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 2007 in conjunction with the second Linking, Learning, Leveraging Regional Symposium in Winnipeg saw seventeen team members from Northern Ontario participate. This workshop identified the themes that are arising in Northern Ontario and reflected on the progress to date and any gaps. The group decided to continue its 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 MA student from Trent, has extended the academic depth of the Northern Ontario team. The addition of Rosalind Lockyer, Monique Beaudoin, and José Reyes has added depth on the community partnership side.

4. We recommend that the project team develop an international strategy.

Two international partners have been added to the Management Board: Dr. Will Bartlett from the School for Policy Studies at the University of Bristol, UK, and José Reyes, a member of the ASOPRICOR Co-operative in Colombia. In addition to contributing to the overall governance of the project, each of these partners will collaborate in the research of the node.

Dr. Bartlett's earlier research has focused on co-operatives in Italy and Spain and the economies of the former Yugoslav states. A colleague of his at Leeds, Virginie Perotin, and Dr. Bartlett are also beginning a research collaboration around French co-operatives. As a contribution to the work of our node, he plans to examine the social economy in eastern Europe, addressing its emergence in the transition countries and outlining the developments and factors that have determined the different patterns of the social economy. He will draw comparisons with the developments in the social economy in southern Europe (Italy and Spain) and northern Europe (UK and Scandinavia).

Since the project proposal did not build in funds to support the travel of an international partner, we are using the following process to gather Dr. Bartlett's input:

- all major project documents (original application, the Milestone Report, and 2006–07 Annual Report) and the minutes of Management Board meetings have been shared with him for his consideration and feedback. This consultation has taken place by e-mail.
- we have encouraged him to attend relevant Canadian conferences with the goal of organizing a Management Board meeting in conjunction with the conference. Thus far there have not been any that were convenient for him, but we continue to look for opportunities. The upcoming CCEDNet conference in Saskatoon is a possibility.

Mr. Reyes has been a regular attendee and much-valued participant at both the two Northern Ontario provincial workshops and the two Linking, Learning, Leveraging regional symposia. ASOPRICOR is a partner in the Northern Ontario research led by the CESD Unit at Algoma University College. The addition of a community partner from Latin America has made a significant contribution to understanding the social economy in an international context. To date, much of the research on the social economy has derived from examples from the UK and Europe, but Latin America shares a number of similarities and differences to the North American context that may provide some valuable learnings for the Social Economy Suite. ASOPRICOR is

a small association involving several hundred families who have developed a number of co-operatives and social enterprises, as well as several other responses to the marginalization of their communities by the economy of Colombia, and indeed, of all of Latin America. Some of the issues we will explore in this collaborative inquiry include the impact of the historical and cultural context on social economy and social enterprise development; Indigenous perspectives on the social economy; and the development of respectful relations between and among cultural differences. As we struggle to define and better understand the social economy, a Latin American perspective on these and other issues should prove a valuable comparator to the Canadian experience.

## **Effectiveness of the Governance Structure in Managing**

### **Key Aspects of Partnership Collaboration**

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 will make every attempt to defray expenses for all meetings. The project has also budgeted funds to defray costs for community partners to participate in regional and provincial workshops, which offer important opportunities for them to provide input into the research planning and implementation process. We plan to assess the balance in the partnership by conducting interviews with a sample of community partners, including those who attended and those who did not attend meetings and provincial gatherings.

Building collaboration into the process of developing a proposal and then working through the successful proposal requires planning and sensitivity to community needs. Researchers in this node are involved in consultation processes that go beyond the usual research project. These collaborative efforts build consensus and community sensitivity. Our team's interdisciplinary character requires researchers and community partners to move beyond their normal operational "silos" and consider alternative methods of collecting and interpreting information. For example, a project focused on mapping the development needs of co-operatives in emerging and underrepresented sectors has benefited from the knowledge, experience, and skills of two community organizations, as well as faculty and students representing three disciplines.

To the extent that community and university researchers engage in all aspects of the research, they both gain an appreciation for all the tasks that are part of the process. In addition to developing collaborative skills as they work on these particular tasks together, they develop a better understanding of each others' perspectives, they develop a better working knowledge of participatory research approaches, they develop a sense of the potential of research and its application, and they gain a greater appreciation of the strengths that partnerships can bring to the research process. They also gain a better understanding of the importance of governance in partnership approaches to collaborative research, the importance of developing working guidelines, methods of conflict resolution, etc.

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. We have had very good attendance at our regional symposia (January 2006: 75; February 2007: 44) and attendance at provincial workshops has been excellent in some locations, fair in others (Ontario: April 2006: 30 plus; Feb 07: 17; February 08: 25; ASOPRICOR in Colombia: three assemblies with 150 people at each; Manitoba: February 07: 10, January 08: 25; Saskatchewan : December 2006: 34, 07 meeting rescheduled for May 08). On balance, the participation of community and academic partners in governance and research management decisions has been fairly equal. This is a high priority of the project and we continue to work towards achieving this balance. (See Appendix 9 for examples of written agreements and protocols outlining partnership functioning).

### **The Advisory Council**

The only component of the governance and management model that has not yet been implemented is the proposed Advisory Council, whose role is to provide advice to the Management Board. As described in the Milestone Report,

*The Advisory Council will be comprised of two community partners from each of Northern Ontario, Manitoba, and Saskatchewan, plus two at-large community partners. The Advisory Council provides 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.*

In the past year, a number of individuals have expressed an interest in joining the proposed Advisory Council. We have found, however, that due to the significant geographical distances across our region, it has been very difficult financially to bring our Management Board together, never mind an additional eight individuals who would compose the advisory council.

However, the provincial-level advisory committees to each of CESD, WIRA and CUISR (see Appendix 8 for composition) are in place and functioning well. They meet regularly at the provincial level to provide input and advice on research plans, and to adjudicate research proposals. To some extent, they have begun to take on the role of the central Advisory Council. In addition, we have added two international observer/members to our Management Board.

The LLL Management Board will be asked at the upcoming in-person meeting to consider if the proposed Advisory Council is necessary to the effectiveness of the management process. If it is deemed to be, additional funds to support travel will have to be found from external sources. There will still be an opportunity to hold at least two meetings and to involve the Advisory Council in the final evaluation of the overall project.

### **Team Members, Collaborators, and Partners**

As mentioned previously, there has been a change to one of the cluster co-leads. Dr. Brett Fairbairn, academic co-lead for the Governance Cluster, has stepped down but has been replaced by Dr. Murray Fulton, Bioresource Policy, Business and Economics Department, University of Saskatchewan. Dr. Fairbairn will continue his involvement in the project through the completion of his recently awarded SSHRC Standard Research Grant, "Cognition and Governance in the Social Economy."

A few of the academics who appeared as collaborators have not yet become involved in a specific project (i.e., Drs. L. Bell, E. Peters, B. Stirling, B. Oleson, L. Brown, G. Marchildon, and E. Goddard). This does not mean, however, that they have left the LLL project, as opportunities still exist for their involvement. At the same time, a number of academics not identified as collaborators in the project have become involved through their role in supervising scholarship and internship recipients.

As with the academic partners, some of the original community partners have not yet found a project to fit with their interests. On the other hand, a steadily increasing number of community organizations not previously identified as partners have become involved with the overall project. These partners come on stream as they initiate research projects at the provincial level through CESD, WIRA and CUISR. Some, such as the Harvest Moon Society, have indicated an interest in providing a letter of support to the project.

### **Delays Encountered and Their Impact on Anticipated Results and Project Completion Date**

The Linking, Learning, Leveraging project is well on track for the completion of the projects identified within Appendix 3. There will continue to be new projects identified as projects are approved in response to the Calls for Proposals by WIRA and CUISR, as well as within the Northern Ontario research plan — approximately 8–12 more in total. Research co-ordinators at the provincial and cluster level will be discouraged from funding projects with start dates later than summer 2009 to ensure time for completion of data collection and report writing.

The project has not encountered any major problems, although there have been small delays at the individual project level, some as long as six months. At times it has been difficult to find a student, or the project has been extended because it was larger than anticipated. The move by the academic co-lead of cluster 5 from Saskatchewan to Ontario created some delays as funds were transferred to the University of Western Ontario. This transfer was completed summer 2007. Finally, the P.I's administrative responsibilities have interfered with her academic leadership role in cluster 4. These issues should be relieved this summer with the addition of research support and the presence of two cluster 4 faculty members coming to Saskatoon as visiting professors at the Centre for the Study of Co-operatives.

On balance, however, I do not anticipate any major changes in output or completion date of the LLL project overall.

### **Section III. Research Training and Development**

Employment and training of graduate and undergraduate students is an integral part of this project. Thus far the project has supported 6 MA and 6 PhD thesis research projects related to the project objectives, and one postdoctoral project. Graduate students have participated in research design, discussions with partners, field research, data analysis, preparation and writing of studies, and presentation of results in both academic and community settings. Student placements with community partners have enabled 17 undergraduate, 16 masters, and 3 doctoral students to learn about the social economy generally and to conduct specific research for the partner involved. More projects yet to get underway will offer still more training opportunities. Please refer to pages 6–7 in section one of the Mid-Term Report for detailed information on curriculum developed since the start of the project.

Scholarships and research assistantships have been advertised as tenable in any of the three provinces of the node and in any discipline related to one of the project topics: social enterprise

development; financing strategies for social enterprise development; governance of social economy enterprises; measuring and mapping the social economy; and developing policy frameworks for the social economy. Scholarship applications are adjudicated by a sub-committee of the relevant cluster.

Wherever possible, we have facilitated student experience in the field, where they have been interacting with community partners and conducting research in collaboration with experienced academics, as well as participating in the central project symposia. An interdisciplinary graduate seminar at the University of Saskatchewan serves as a foundation for offering students training in community-based research methods as well as case writing skills.

In addition to being involved in all stages of the research process, research staff (students, staff, and community partners) are provided with opportunities to participate in the regional node through: (1) discussion forums on the Linking, Learning, Leveraging website; (2) the annual provincial workshops; and (3) conferences directly related to their research.

With contributions from the National Hub, Linking, Learning, Leveraging hosted the first in a series of graduate student workshops for students studying the social economy. Building Respectful Relationships: Conducting Community-Based Research 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.

In Northern Ontario, weekly research discussion forums are held throughout the academic year. Researchers have the opportunity to develop skills through training, mentoring, and supervision. For example, in April 07, student researchers attended a conference on resiliency in forest-dependent communities in Hearst, a Northern Ontario Francophone community. Two participants from the ASOPRICOR project in Colombia attended this conference. A group of researchers interested in food security and working with community-based organizations also met in April to examine opportunities to collaborate among Francophone, Indigenous, and Anglophone communities in Northern Ontario as well as with the community researchers from Colombia.

In Manitoba, learning about community-based research and the development of skills in this area is the primary objective of the Community Research Hub, which has organized Community Learning Circles through which participants have access to six training modules. Within the context of the project, community participants are conducting focus groups, door-to-door surveys, community consultations, and transcribing interviews. A major goal of this research initiative is to increase the education and employability of participants and to link community participants to employers.

In Saskatchewan, students and community partners actively participate in the design of the research, and community and university researchers are gaining an understanding about the nature and processes of community-based research. Community partners facilitate the collection of the data (organizing focus groups and interviews) for the students. Once the data is collected, community partners and researchers discuss the analysis of the data together. Weekly updates from researchers keep community partners informed on literature reviews and the general write-up of the report.

In Manitoba, a student researcher comments on the what he has learned about community-based research from participating in one of the LLL funded projects:

*With community-based research, it is difficult to separate out what is academic and what is not. The basis of my methodology is participatory action research and I consider this to include my participation in committees, grant writing, community workshops, and other activities (including those both related and unrelated to the*

*“formal” data collection methods). Even the presentations, workshops (such as at the Harvest Moon Festival and at the upcoming food conference) have been facilitated by my participation in the project and, in some cases wouldn't be happening without my help in linking people in my project to other opportunities. My involvement and the time I can commit to the group helps take us from beyond the action and business aspects of what we are doing to sharing/disseminating the information and taking time to engage in explicitly reflective activities (i.e., focus group discussions about concepts and issues, progress, etc.). These reflective activities are not only useful for the “research” but have been useful for the “action” as well. After one of our focus group interviews, one participant stated to the group, “that was one of the most useful meetings we've had” and then went on to remark that we need to take more time and opportunities to talk more broadly about the issues and talk openly with each other (in the group). Everyone agreed.*

*I must qualify these comments by saying that I am not taking credit for the multiple successes of the group. It's not that our amazing progress necessarily would not have happened without my participation but that things would have certainly taken longer and would not have been documented as thoroughly. I have played an important role as a facilitator, networker, documenter, enabler, and research assistant to the group but ultimately the credit for our success lies with the collective minds involved in the project.*

*(Colin Anderson, Harvest Moon Project)*

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. In Saskatchewan, a pilot student mentorship model matches a master's or doctoral student with an undergraduate to work together with community partners on a research project. We have found that both students, as well as community, benefit from the experience.

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

In Manitoba, student and community researchers will gain the following skills:

- community liaison
- 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

A few of the student interns have now completed their own graduate work and moved on from the project. Two of the master's students have taken employment in Saskatoon in their discipline; one has accepted a position as an economic development officer in a small Saskatchewan community. One of the doctoral students has accepted a faculty position at the University of Regina. A master's student who worked as an intern has been accepted into a doctoral program in Ontario and awarded a PhD scholarship within the LLL project. Several undergraduate students associated with the CESD projects have started graduate programs and continue to be involved in LLL projects.

#### **Section IV. Research and Knowledge Production**

As mentioned previously, our project is fortunate to have the accumulated experience of two successful CURAs associated with its network of researchers. We have built on the foundation of existing research networks and worked with existing protocols developed over the life of the previous CURAs. We have also been able to build on the strong relationship that the Community Economic and Social Development Unit at Algoma University enjoys with its First Nations students and partners. In addition, many faculty and community partners affiliated with a completed, SSHRC-funded strategic grant led by Dr. Brett Fairbairn at the Centre for the Study of Co-operatives committed to continued involvement in research with us and joined as community partners for the Linking, Learning, Leveraging project. This strong foundation has contributed to the development of a network of researchers – community, academic, and student partners– working together with extremely positive outcomes.

#### **Top Five Achievements to Date**

##### *1. Knowledge Production*

Twelve 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 (See Dissemination of Research Results, pp. 9–10). Eight research reports have been written and three working papers are complete. One non-peer-reviewed book has been completed and will be published in 2008. Three non-peer-reviewed book chapters have been submitted; two peer-reviewed and one non-peer-reviewed chapter have been accepted. Two peer-reviewed journal articles have been submitted and another has been accepted. A manual and a self-assessment tool have been developed; a second manual is in process. A train-the-trainer workshop was held. See Appendix 4.

##### *2. Knowledge Mobilization*

From 28 May to 1 June 2007, 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 to this subject and involved research partners from the six regional nodes across the country. The National Hub partnered with the Northern Ontario, Manitoba, Saskatchewan node to co-ordinate a Social Economy display as part of the Congress Publishers' Exhibit. See Appendix 19 for the conference program.

### *3. Building Collaboration*

The central model for building collaboration within the LLL project consists of annual opportunities for in-person meetings of community, academic, and student partners to share ideas, set research priorities, and discuss research results. The inaugural Linking, Learning, Leveraging Regional Symposium was held in Saskatoon January 2006. Project partners gathered for a day and a half to discuss issues of definition, to introduce existing social economy activities in each of the three provinces to other members of the team, to set research priorities for the coming five years, and to establish research plans within the research clusters. 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. CUISR had held their provincial workshop in December 2006. WIRA hosted their second provincial workshop January 11, 2008 and CESD their third on February 8 and 9. CUISR's second provincial workshop is planned for May 2, 2008.

### *4. Training and Development*

*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. See appendix 20 for the workshop agenda.

### *5. Leveraging External Funds*

Since 2005, a total of \$1,368,422 in cash 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. (See Appendix 10 for details).

### **Update on Research Projects**

Twelve research projects have been completed; another 30 are new in the past year, and 8 are ongoing since the start of the project. In total, 56 projects have been identified and funding allocated, with the potential of an additional 8–12 to be funded through the Call for Proposals process utilized by WIRA and CUISR.

The following section provides an overview of the projects completed to date. Please refer to Appendix 3 for detailed descriptions of project objectives, outcomes, budgets, and research teams, and to Appendix 3a for a narrative description of the projects organized by “completed,” “ongoing,” and “new.”

The following completed projects 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
- Penokean Hills Marketing Project
- Developing and Retaining Human Capital in First Nations

The five research projects focus on urban, First Nations, 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 websites.

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
- A New Vision for Saskatchewan: Changing Lives and Systems through Individualized Funding for People with Intellectual Disabilities

One cluster 4 project has been completed. 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.

- Measuring and Mapping the Impact of the Social Economy: A Case of Co-operatives in Canada

## Section V. Dissemination of Research Results

Our project's dissemination plan has incorporated many of the innovative communication strategies employed by the Community-University Institute for Social Research and the Centre for the Study of Co-operatives, and we will continue to disseminate results through a variety of community- and academic-focused methods. The former has included, for example:

- “Brown-Bag” presentations — located in the community, presented by community groups and/or student researchers, to a community-based audience, which may include academics
- community forums — meetings with the general public in conjunction with partner organizations to present research findings oriented towards the community, sometimes using theatre to dramatize the results
- theme-focused seminars — events that bring together research partners and the general community, providing discussion around multiple studies on a common research theme

We will continue to use well-established relationships with local media, making use of news and events programming on radio and television, as well as features sections of local newspapers, to profile research results that have a community focus. We have encouraged researchers in other subregions of our node to nurture similar partnerships and Northern Ontario in particular has been successful in doing this.

CESD developed and delivered a one-day “train-the-trainer” workshop in February of this year. The workshop was designed to orient developers to the various types of social economy organizations and to provide case studies demonstrating successful social economy enterprises. The event was very successful, with forty participants attending in person and another twenty joining in on-line.

Our communications plan also includes more conventional means of communicating research results. There are three components: conferences and workshops, print publications, and website/electronic publications. These complementary methods enable dissemination to wide and varied audiences.

Research within the various clusters is initially published in the form of reports and conference papers. Faculty and student team members have been asked to present their findings at external academic conferences in their disciplines and to submit their research to peer-reviewed journals in their respective disciplines. Academic and community partners have also been encouraged to present research findings to relevant practitioner-oriented conferences and workshops. Our partners are responding to this encouragement and many have presented papers to practitioner- and academic-oriented audiences over the past two years.

The proposal identified plans for two large conferences or symposia, one in the first year to provide a forum for the discussion of theoretical and methodological approaches to the study of the social economy, and a capstone conference in the fourth year, to showcase research findings, analysis, and policy implications. We have increased the number of regional symposia to three, holding the first in January 2006, the second in February 2007, with plans for the third in the fall of 2009. Smaller annual workshops take place at the provincial level. Finally, in addition to the three planned symposia, in May of 2007 we hosted an international conference focused on the Social Economy.

A first edited volume of case studies (twelve cases in total) has been completed (Jorge Sousa and Roger Herman, eds., *A Co-operative Dilemma: Converting Organizational Form* (Saskatoon: Centre for the Study of Co-operatives, forthcoming 2008). Edited volumes are

anticipated from the international conference and the final regional symposia. We plan to seek a peer-reviewed press for the second volume. As part of the project, the Centre for the Study of Co-operatives has designed print and web-based publications aimed at partner organizations, the co-operative sector, public-sector agencies and policy makers, students, libraries, and the general public. In addition to these numerous communication activities, many of our partner organizations intend to publish results and make them widely available to their members through their in-house newsletters and online discussion fora. For more details on the Knowledge Dissemination and Communication Plan, see Appendix 11. For a list of events that have taken place or are planned, see Appendix 12. For detailed information regarding the types of dissemination vehicles in use by the Linking, Learning, Leveraging project, please refer to the Dissemination of Research Results and Knowledge Dissemination Events tables on pages 9–10.

### *Linking, Learning, Leveraging Website*

The website for the Linking, Learning, Leveraging node of the Social Economy Project, at [www.usaskstudies.coop/socialeconomy](http://www.usaskstudies.coop/socialeconomy), houses all historical and current information about the project as well as links to other associated sites and information. Along with the static information, there is a blog on the site where current information is posted. Our node is so geographically broad that maintaining good communications is both a challenge and a priority. The website and the corresponding blog are imperative for providing a one-stop, searchable location on the Internet for information and communications about the project. Individuals and organizations interested in becoming involved in the project can easily find information about scholarships, internships, and how to initiate a project or partner with one already in progress. Our publications, including our newsletters and reports, are available on the site, and press releases and media coverage are documented there as well. Past project events are documented and information about upcoming events are provided. Search Engine Optimization has been taken into account in the development of the site in order that this project be easy to find through both specific and random internet searching.

## **Section VI. Performance and Evaluation**

The principal investigator and project administrator continuously monitor the overall execution of the research program. This is facilitated through the reports required from the academic partners administering the decentralized funds, as well as standardized activity reports completed by the co-leads/directors of the five clusters and three provincial organizations.

Internal tracking systems have been established at the various universities. At CESD, for example, each project has a proposed end date with a set of deliverables. All dates are on a calendar and are tracked internally by both the CESD department and the accounting department at Algoma University College. The co-directors meet with the community partners on a regular basis and provide supervision and support to all community-based researchers. Full reports on methodology are required of all researchers, both academic and community-based.

Within WIRA and CUISR, the progress of research projects is monitored by the research liaison and community liaison directors, who regularly check on progress, require a status report half-way through the work, and check on the status of work if projects are not completed on time. Upon completion of the work, the directors review the draft report and make suggestions for improvements, provide initial editing, and also discuss dissemination possibilities with the partnership team.

The usefulness and quality of the research conducted is monitored by collecting information regarding: dissemination events; publications; media coverage; spin-off research initiatives; ability to leverage other money; and impact on policy development and program development, as both illustrate the policy relevance of the work.

In the longer term, research outputs will be examined for

- lasting effects in the community — the sustainability of the research network, for example; the use of information by community groups in efforts to influence policy; feedback indicating that tools developed through the project have been relevant and useful
- long-term outcomes for students — numbers successfully completing their programs, finding relevant jobs, pursuing additional graduate work

Ongoing evaluation has been conducted on an informal basis by the LLL project director at each of the provincial workshops and regional symposia. Feedback has been gathered regarding concerns related to restricted funding for student interns and community advisors, as well as communication challenges within clusters. Actions have been taken to provide additional funds to projects. Additional meetings have been held to address communication issues, and we have experimented with web-based tools to find the best means for facilitating communication. Finally, we have added a third, unplanned, Regional Symposium in response to feedback received from Management Board members and research partners. We found that it was necessary to hold a second regional symposium in year two to facilitate the collaboration building process, as well as to firm up research planning.

A more formalized evaluation was conducted at the February 2008 Northern Ontario workshop. (See Appendix 13 for the evaluation guide). Workshop participants provided extremely valuable feedback, emphasizing their satisfaction with the collaborative process used for research formulation, implementation, and dissemination, as well as the value to their organizations of the research produced.

### **Research Project Stakeholder Evaluation Summary**

A brief survey instrument was designed for and administered to a sample of the individual research project stakeholders (see Appendix 14). The instrument contained questions that solicited open-ended qualitative responses with specific illustrative examples as well as five-point scales allowing rough quantitative measures of the respondents' experiences. The instrument was designed to solicit feedback from three distinct sub-groups — academic researchers, community-based organization representatives, and students engaged in the project. The survey asked questions about individual experience with the project relating to: overall project design; project management; relevance of the research; impact resulting from the research process or findings; effectiveness of knowledge dissemination; development of research or project management skills; and the effectiveness of this model of community-university collaboration. Samples were collected from projects in each of the Northern Ontario, Manitoba, and Saskatchewan regions.

While the evaluation results were very positive overall and validated the various methodologies employed, they also provided useful information on how such projects might be improved or how common challenges might be anticipated or minimized on future projects. The results from each of the three regions, and from each of the three stakeholder groups, were consistent. Respondents spoke of the importance and value of the research results, but also of the process and how it has and will continue to have a positive impact. The opportunity for

involvement by all stakeholders in the design and execution of the research was lauded, as was the variety of dissemination strategies. The following quotation captures the essence of most of the responses:

*I feel that this project demonstrates the best of the social economy research — we are increasing our understanding of how social enterprises work, how they are governed, financed, and sustained, while at the same time concretely contributing to expanding the social economy of the region.*

The occasional difficulties encountered and the corresponding suggestions for improvements typically related to an underestimation of the time involved in undertaking such research, and in one instance highlighted the important role that media can play in shaping the public perception of research.

The data compiled to date, and that added from continued utilization of this evaluation tool, will help to guide and shape ongoing research undertaken in the node. Each research project will be evaluated using this survey instrument as soon as the project is complete.

## **Section VII. Budget Justification**

### *Project Budget Review — September 2005 – 31 August 2008*

Division of project funds has been accomplished by allocating specified annual amounts to each cluster and provincial organization. These amounts have been allocated on an equitable basis, and each co-lead is aware of the funds that have been allocated to others. They are also aware that funds can and will be reallocated to address projects identified as a priority by the total research team. The co-leads have in most cases adhered closely to the annual budgets, and have paced research to follow anticipated funds. See Appendix 18 for a detailed breakdown of amounts and categories.

Memoranda of Understanding (MOU) have been signed with the two universities in Manitoba (Winnipeg and Manitoba) and two in Ontario (Algoma and Western) where academic co-leads are located. These MOUs have established the procedures for the administration of decentralized funds and associated reporting requirements. On the whole, the process of distributing funds to the project's sister universities has gone very smoothly, and internal processes and procedures at the respective universities have been supportive of project objectives. A sub-account administered by CUISR has also been established at the University of Saskatchewan. Budgeted amounts are dispersed to the Manitoba, Ontario, and CUISR accounts on an annual basis, the first having gone out March 2006, the second 31 March 2007, with a third disbursement in March 2008.

Financial reports on the expenditures incurred by the accounts are provided to the University of Saskatchewan Financial Services Division one year following receipt of disbursements. Thus far, the U of S has filed one report to SSHRC for expenditures incurred during the period 1 April 2006 to 31 March 2007. For additional and detailed information regarding expenditures to date please consult Appendices 15 and 16. Appendix 15 provides a breakdown of the 2006–07 financial reports provided by the University of Saskatchewan, Financial Services Division, and covers project expenditures from 1 September 2005 to 31 March 2007. Appendix 16 provides a statement of spending for the period 1 April 2007 to 31 December 2007.

Overall the project is on, or close to being on, budget. It should be noted, however, that many of the research projects did not come on stream until May of 2007, and a number of scholarships were awarded during 2007, so the financial reports that will be provided to SSHRC in spring of 2008 will reflect significant increases in spending.

In some instances, additional funds secured from other sources have allowed new — or unanticipated — projects or bolstered those funds designated for specific initiatives, thus allowing a broader scope or deeper penetration of the particular research area. We are very satisfied with the amount of external funds generated by academic and community partners. See Appendix 10 for an overview of additional resources secured or anticipated.

While precise tracking of in-kind support is more difficult, such contributions are equally important (see Appendix 17 for details). In general, the level of in-kind support identified in the application has been or is being provided. This has typically taken the form of the time spent by representatives, managers, and researchers, the provision of space for meetings, workshops, and conferences, the data and information provided that is otherwise unavailable, and in some instances, travel costs not eligible for reimbursement by the project. Noteworthy examples of individual contributions of time include that by Martin Chicilo of Affinity Credit Union, Quintin Fox from the Canadian Co-operative Association, or Brenden Reimer from the Canadian Community Economic Development Network, each of whom spend inordinate amounts of unpaid time as community co-leads for research clusters. Less obvious but equally important is the cumulative time spent by individuals in meetings, planning sessions, evaluation sessions, and research activities. Meeting space has been provided by the University of Winnipeg, Algoma University College, and the University of Saskatchewan for numerous conferences and workshops, but community partner organizations have also hosted countless meetings, focus group sessions, or provided offices for individual research interviews. While the value of the information provided is most easily illustrated by the data provided by the Co-operatives' Secretariat, Government of Canada, and used for mapping the physical locations of social economy enterprises in Canada, each time a research participant responds to a survey, engages in an interview, or joins a focus group, he or she is providing valuable data. In some instances a community or academic partner has been less involved than anticipated and the corresponding contribution has decreased. However, many additional community partners and academic researchers have joined the project and provide additional in-kind contributions, thus offsetting any reduction that may have occurred. Further, in some instances, the actual level of in-kind contribution far exceeds that originally anticipated (e.g., the Centre For the Study of Co-operatives and the Community-University Institute for Social Research at the University of Saskatchewan, the Winnipeg Inner-City Research Alliance at the University of Winnipeg, and the Community Economic and Social Development Unit at Algoma University, or that of individual researchers such as Lou Hammond Ketilson, Isobel Findlay, Tom Carter, or Gayle Broad). In each of these examples the larger-than-anticipated contribution relates to the complexity of guiding, monitoring, and administering this type of research project.

Other original promises of support for this project, such as Research Time Stipends (RTS) and cash contributions for graduate student scholarships by the University of Saskatchewan, have likewise been fulfilled.

#### *Budget Justification — September 2008 – August 2010*

I am not aware of any reason to depart from the planned expenditures as set out in the annual budgets for 2008–2009 and 2009–2010. As I mentioned previously, provincial and cluster co-leads have in most cases adhered closely to the annual budgets. They have planned and paced their research activities around received and anticipated funds. In most cases where resources have been needed in excess of the amount budgeted for activities, the relevant co-leads have sought and been successful in finding additional funds from other sources.

At the provincial level, CUISR and WIRA will advertise two more requests for proposals, and will meet the request for interns to support research initiatives. Each of the three provinces will hold two more workshops for project participants, covering expenses for travel and meals with allocated funds. All but the equivalent of two doctoral scholarships have been awarded within the clusters.

As research projects continue to be completed, associated costs for dissemination will increase for students and partners alike. Travel funds have been budgeted to attend domestic and international conferences. Editorial support is being provided by a centre staff person and funds have been allocated centrally to support the cost of printing. We did not budget for translation expenses and have sought external funds for this activity on a project-by-project basis. Expenses associated with translation will continue to mount but will be funded externally.

The date for the final project-wide symposium is being planned at this moment to avoid conflict with the conference plans of other nodes. A fall 2009 date is anticipated.

## Appendix 1: Research Staff Participating in the Northern Ontario, Manitoba, and Saskatchewan Regional Node of the Social Economy Suite

| RESEARCH STAFF         |                                                                                                          |                     |      |                                                         |                                                                                         |
|------------------------|----------------------------------------------------------------------------------------------------------|---------------------|------|---------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Name and surname       | Provenance of research staff member (university or community-based organization)                         | Student (Yes or no) | Paid | Unpaid (if unpaid, how is their involvement supported?) | Role of research staff member (research coordinator, project manager, technician, etc.) |
| <b>Ontario</b>         |                                                                                                          |                     |      |                                                         |                                                                                         |
| Shannon Atkinson       | Algoma University College                                                                                | Yes                 | Yes  |                                                         | Researcher                                                                              |
| Juanita Bacsu          | University of Western Ontario                                                                            | Yes                 | Yes  |                                                         | Researcher                                                                              |
| Rachid Bagaoui         | Professor, Laurentian University                                                                         | No                  | No   | Faculty                                                 | Researcher                                                                              |
| Monique Beaudoin       | Formerly CCEDnet (Ontario); currently le Comité de Recherche sur l'économie sociale du nord de l'Ontario | No                  | No   | Collaborator                                            | Co-lead Cluster 4                                                                       |
| Meghan Boston          | Algoma University College – CESD                                                                         | No                  | No   | External Funding                                        | Researcher                                                                              |
| Amy Boyer              | Algoma University College – CESD                                                                         | Yes                 | Yes  |                                                         | Researcher                                                                              |
| Gayle Broad            | Algoma University College – CESD                                                                         | No                  | No   | Faculty                                                 | CESD Research Director; Co-lead Cluster 1                                               |
| Cristine de Clercy     | University of Western Ontario                                                                            | No                  | No   | Faculty                                                 | Academic Supervisor; Co-lead Cluster 5                                                  |
| Alice Corbiere         | Algoma University College- CESD                                                                          | No                  | No   | External Funding                                        | Research Co-ordinator                                                                   |
| David Elgie            | Indian and Northern Affairs Canada                                                                       | No                  | No   | Community Organization                                  | Community Advisor                                                                       |
| Cecilia Fernandez      | Algoma University College – CESD                                                                         | No                  | No   | External Funding                                        | Research Co-ordinator                                                                   |
| Quintin Fox            | Canadian Co-operative Association                                                                        | No                  | No   | Community Organization                                  | Community Advisor; Co-lead Cluster 3                                                    |
| Margot Francis         | Brock University                                                                                         | No                  | No   | Faculty                                                 | Researcher                                                                              |
| Bonnie Gaikhezheyongai | Algoma University College                                                                                | Yes                 | No   | External Funding                                        | Researcher                                                                              |
| Sheila Gruner          | Algoma University College – CESD                                                                         | Yes                 | No   | External Funding                                        | Researcher                                                                              |
| Karl Hele              | University of Western Ontario                                                                            | No                  | No   | Faculty                                                 | Researcher                                                                              |
| Christian Howald       | Laurentian University                                                                                    | Yes                 | Yes  |                                                         | Researcher                                                                              |
| Rosalind Johnston      | Algoma University College – CESD                                                                         | Yes                 | No   | External Funding                                        | Executive Assistant, CESD                                                               |
| Elisabeth Labrie       | Laurentian University                                                                                    | Yes                 | Yes  |                                                         | Researcher                                                                              |
| Rosalind Lockyer       | PARO Centre for Women's Enterprise                                                                       | No                  | No   | Community Organization                                  | Research Coordinator                                                                    |

|                     |                                                                          |     |     |                              |                            |
|---------------------|--------------------------------------------------------------------------|-----|-----|------------------------------|----------------------------|
| Miranda Mayhew      | Algoma University College – CESD                                         | Yes | No  | External Funding             | Researcher                 |
| Diane Merini        | Algoma University College                                                | No  | Yes |                              | Research Co-ordinator      |
| Chris Metatawabin   | Fort Albany First Nation                                                 | No  | No  | Community Organization       | Research Co-ordinator      |
| Alicia Mills        | Algoma University College                                                | No  | Yes |                              | Research Co-ordinator      |
| Michael Mills       | Indian and Northern Affairs Canada                                       | No  | No  | Community Organization       | Community Advisor          |
| Jude Ortiz          | U. of the West of England, Bristol, UK; Algoma University College – CESD | Yes | No  | External Funding             | Research Co-ordinator      |
| José Reyes          | ASOPRICOR; Algoma University College – CESD                              | Yes | Yes |                              | Research Coordinator       |
| Madison Saunders    | Algoma University College                                                | No  | Yes |                              | Researcher                 |
| Linda Savory-Gordon | Algoma University College – CESD                                         | No  | No  | Faculty                      | Academic Supervisor        |
| Sharon Sayers       | Algoma University College                                                | Yes | Yes |                              | Researcher                 |
| Christine Sy        | Trent University                                                         | Yes | Yes | Student                      | Researcher                 |
| Bob Tarantini       | Algoma University College                                                | Yes | No  | Student                      | Researcher                 |
| David Thompson      | Algoma University College                                                | Yes | Yes |                              | Researcher                 |
| Mark Ventry         | Ontario Co-operative Association                                         | No  | No  | Community Partner            | Researcher                 |
| <b>Manitoba</b>     |                                                                          |     |     |                              |                            |
| Monica J. Adeler    | University of Saskatchewan                                               | Yes | Yes |                              | Researcher                 |
| Inonge Aliaga       | Spence Neighbourhood Assoc.                                              | No  | No  | Community Organization       | Community Advisor          |
| Colin Anderson      | University of Manitoba                                                   | Yes | Yes |                              | Researcher                 |
| Kim Bailey          | Mount Carmel Clinic                                                      | No  | No  | Community Partner            | Community Co-lead          |
| Tom Carter          | University of Winnipeg                                                   | No  | No  | Faculty                      | WIRA Research Director     |
| Paul Chorney        | Manitoba Food Charter                                                    | No  | No  | Community Partner            | Community Co-lead          |
| Cindy Coker         | SEED, Winnipeg                                                           | No  | Yes |                              | Research Co-ordinator      |
| Anita Friesen       | University of Winnipeg (WIRA)                                            | No  | Yes |                              | WIRA Program Administrator |
| Jo-lene Gardiner    | Harvest Moon Society                                                     | No  | No  | Community Partner            | Community Advisor          |
| Lois Gray           | University of Manitoba                                                   | Yes | Yes |                              | Researcher                 |
| Celia Guildford     | Harvest Moon Society                                                     | No  | No  | Community Salary Replacement | Community Researcher       |
| Jesse Hajar         | University of Manitoba                                                   | Yes | Yes |                              | Researcher                 |
| Joan Hay            | House of Opportunities                                                   | No  | No  | Community Partner            | Community Advisor          |

|                     |                                                                            |     |     |                                |                                           |
|---------------------|----------------------------------------------------------------------------|-----|-----|--------------------------------|-------------------------------------------|
| Judith Harris       | University of Winnipeg                                                     | No  | No  | Faculty                        | Research Co-ordinator                     |
| James Kornelson     | University of Manitoba                                                     | Yes | Yes |                                | Researcher                                |
| Sandra Leone        | Community Research Hub (CRH) and Manager, Spence Neighbourhood Association | No  | No  | Community Partner              | Community Advisor                         |
| Brock Legge         | University of Winnipeg                                                     | Yes | Yes |                                | Researcher                                |
| John Loxley         | University of Manitoba                                                     | No  | No  | Faculty                        | Academic Advisor                          |
| Stephene McLachlan  | University of Manitoba                                                     | No  | No  | Faculty                        | Research Co-ordinator                     |
| Richard Milgrom     | University of Manitoba                                                     | No  | No  | Faculty                        | Academic Supervisor                       |
| Cara Nichols        | University of Manitoba                                                     | Yes | Yes |                                | Researcher                                |
| Joel Novek          | University of Winnipeg                                                     | No  | No  | Faculty                        | Research Co-ordinator                     |
| John Osbourne       | University of Winnipeg                                                     | Yes | Yes | Internship Student             | Student Researcher                        |
| Brendan Reimer      | CCEDNet – (Prairies and Northern Territories)                              | No  | No  | 1 Community Salary Replacement | Research Co-ordinator; Co-lead, Cluster 5 |
| Russ Rothney        | Assiniboine Credit Union                                                   | No  | No  | Community Organization         | Community Advisor                         |
| Dan Simpson         | University of Winnipeg                                                     | Yes | Yes |                                | Researcher                                |
| Terry Thompson      | Arctic Co-operatives Ltd.                                                  | No  | No  | Community Organization         | Community Advisor                         |
| Robyn Webb          | University of Manitoba                                                     | Yes | Yes |                                | Researcher                                |
| Wanda Wuttunee      | University of Manitoba                                                     | No  | No  | Faculty                        | Research Co-ordinator; Co-lead Cluster 2  |
| <b>Saskatchewan</b> |                                                                            |     |     |                                |                                           |
| Heather Acton       | Centre for the Study of Co-operatives, University of Saskatchewan          | No  | No  | University In-kind             | LLL/RCS Project Administrator             |
| Karen Archibald     | Child Hunger and Education Program                                         | No  | No  | Community Organization         | Community Advisor                         |
| Maria Basualdo      | CUISR, University of Saskatchewan                                          | No  | Yes |                                | Community Liaison                         |
| Arlene Bear         | University of Saskatchewan                                                 | Yes | Yes |                                | Researcher                                |
| Lynne Bell          | University of Saskatchewan                                                 | No  | No  | Faculty                        | Academic Partner                          |
| Julia Bidonde       | Saskatchewan Association for Community Living                              | No  | No  | Community Organization         | Community Advisor                         |
| Lori Blondeau       | University of Saskatchewan; TRIBE Inc.                                     | Yes | Yes |                                | Researcher                                |
| Faith Bodnar        | Saskatchewan Abilities Council                                             | No  | No  | Community Organization         | Community Advisor                         |
| Karen Bonesky       | South West Centre for Entrepreneurial Development                          | No  | No  | Community Organization         | Community Advisor                         |

|                      |                                                                   |     |     |                                |                                                   |
|----------------------|-------------------------------------------------------------------|-----|-----|--------------------------------|---------------------------------------------------|
| April Bourgeois      | Prairie Labour Workers Co-op Council                              | Yes | No  | 1 Community Salary Replacement | Community Researcher; Co-Lead Cluster 1           |
| Kim Brown            | University of Saskatchewan                                        | No  | Yes |                                | Researcher                                        |
| Michael Chartier     | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Martin Chicilo       | Affinity Credit Union                                             | No  | No  | Community Organization         | Community Advisor; Co-lead Cluster 2              |
| Louise Clarke        | University of Saskatchewan                                        | No  | No  | Faculty                        | Academic Advisor                                  |
| Bryan Clavier        | Spruce River Research                                             | No  | No  | Community Organization         | Community Advisor                                 |
| Kathie Cram          | Community Development Society of Saskatchewan                     | No  | No  | Community Organization         | Community Advisor                                 |
| Warren Crossman      | Saskatchewan Co-operative Association                             | No  | No  | Community Organization         | Community Advisor                                 |
| Mitch Diamantopoulos | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Robert Dobrohoczki   | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Dwayne Docken        | Saskatoon Urban Aboriginal Strategy                               | No  | No  | Community Organization         | Community Advisor                                 |
| Brett Fairbairn      | University of Saskatchewan                                        | No  | No  | Faculty                        | Academic Supervisor; Co-lead, Cluster 3           |
| Isobel M. Findlay    | University of Saskatchewan                                        | No  | No  | Faculty                        | CUISR Research Director; Academic Advisor         |
| Flo Frank            | Common Ground Consulting                                          | No  | Yes |                                | Community Advisor                                 |
| Murray Fulton        | University of Saskatchewan                                        | No  | No  | Faculty                        | Academic Supervisor                               |
| Michael Gertler      | University of Saskatchewan                                        | No  | No  | Faculty                        | Academic Advisor                                  |
| Lou Hammond Ketilson | Centre for the Study of Co-operatives, University of Saskatchewan | No  | No  | Faculty                        | LLL/RCS Principal Investigator; Co-lead Cluster 4 |
| Judy Hannah          | Saskatchewan Association for Community Living                     | No  | No  | Community Partner              | Research Co-ordinator                             |
| Wu Haotao            | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Jason Heit           | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Roger Herman         | University of Saskatchewan                                        | No  | No  | University In-kind             | Research Co-ordinator                             |
| Kathleen James-Cavan | University of Saskatchewan                                        | No  | No  | Faculty                        | Academic Supervisor                               |
| Chipo Kangayi        | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Philip Knudtson      | University of Saskatchewan                                        | Yes | Yes | Student                        | Researcher                                        |
| Darlene Lanceley     | Dept. of Sociology, University of Saskatchewan / CUISR            | No  | No  | Faculty                        | Research Co-lead                                  |
| Gloria Lee           | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |
| Karen Lynch          | University of Saskatchewan                                        | Yes | Yes |                                | Researcher                                        |

|                               |                                                                                 |     |     |                                |                                                             |
|-------------------------------|---------------------------------------------------------------------------------|-----|-----|--------------------------------|-------------------------------------------------------------|
| Greg Marchildon               | University of Regina                                                            | No  | No  | Faculty                        | Academic Partner                                            |
| Dionne Miazdyck-Shield        | Saskatchewan Abilities Council                                                  | No  | No  | Community Organization         | Researcher                                                  |
| Jesse Morin                   | Saskatchewan First Nations Wholesale Co-operative                               | No  | No  | Community Organization         | Community Advisor                                           |
| Walter Nisbet                 | Canadian Organic Certification Co-operative                                     | No  | No  | Community Organization         | Community Advisor                                           |
| Rose Olfert                   | University of Saskatchewan                                                      | No  | No  | Faculty                        | Academic Supervisor                                         |
| Dwayne Pattison               | Centre for the Study of Co-ops, University of Saskatchewan                      | Yes | Yes |                                | Researcher                                                  |
| Cassandra Phillips            | University of Saskatchewan                                                      | No  | No  | Faculty                        | Academic Advisor                                            |
| April Roberts                 | First Nations Agricultural Council of Saskatchewan                              | No  | No  | Community Organization         | Community Advisor                                           |
| Bill Rosher                   | Canadian Organic Certification Co-operative                                     | No  | No  | Community Organization         | Community Advisor                                           |
| Karlah Rudolph                | University of Saskatchewan                                                      | Yes | Yes |                                | Researcher                                                  |
| Lorraine Salt                 | Centre for the Study of Co-ops, University of Saskatchewan                      | No  | No  | University In-kind             | LLL/RCS Project Administrator                               |
| Kama Soles                    | University of Saskatchewan                                                      | Yes | Yes |                                | Researcher                                                  |
| Cara Spence                   | University of Saskatchewan                                                      | Yes | Yes |                                | Researcher                                                  |
| Pat Thomas                    | Chartered Accountant                                                            | Yes | Yes |                                | Researcher                                                  |
| Verona Thibault               | Saskatchewan Economic Developers Association                                    | No  | No  | Community Organization         | Community Advisor                                           |
| Len Usiskin                   | Quint Development Corp                                                          | No  | No  | 1 Community Salary Replacement | Community Co-director, CUISR                                |
| Howard Woodhouse              | University of Saskatchewan                                                      | No  | No  | Faculty                        | Academic Supervisor                                         |
| <b>National/International</b> |                                                                                 |     |     |                                |                                                             |
| Will Bartlett                 | School for Policy Studies, University of Bristol, UK                            | No  | No  | Faculty                        | Academic Advisor                                            |
| Marie Bouchard                | Université du Québec à Montréal                                                 | No  | No  | Faculty                        | Academic Advisor                                            |
| Leslie Brown                  | Mount Saint Vincent University                                                  | No  | No  | Faculty                        | Academic Partner                                            |
| Chris Clamp                   | School of Community Economic Development, Southern New Hampshire University, US | No  | No  | Faculty                        | Academic Advisor                                            |
| Albert Daost                  | Co-operatives Secretariat                                                       | No  | No  | Government Organization        | Community Advisor                                           |
| Rupert Downing                | Canadian Community Economic Development Network (CCEDNet)                       | No  | No  | Community Organization         | Community Advisor; Co-Director, Canadian Social Economy Hub |
| Jon Marc Fontan               | Université du Québec à Montréal                                                 | No  | No  | Faculty                        | Academic Advisor                                            |
| Derek Gent                    | VanCity Community Foundation                                                    | No  | No  | Community Organization         | Community Advisor                                           |

|                         |                                                         |     |     |                        |                    |
|-------------------------|---------------------------------------------------------|-----|-----|------------------------|--------------------|
| Mike Gismondi           | Athabasca University, BALTA                             | No  | No  | Faculty                | Academic Advisor   |
| Jenny Kain              | Lakeland College, Alberta                               | Yes | No  | External Funding       | Researcher         |
| Jessica Gordon Nembhard | University of Maryland College Park                     | No  | No  | Faculty                | Academic Partner   |
| Mark Partridge          | Ohio State University                                   | No  | No  | Faculty                | Academic Advisor   |
| Emma Sharkey            | University of Victoria                                  | Yes | Yes |                        | Researcher         |
| Jorge Sousa             | University of Alberta                                   | No  | No  | Faculty                | Academic Advisor   |
| <b>Colombia</b>         |                                                         |     |     |                        |                    |
| Francisca Baez          | Agua de Dios                                            | No  | No  | Community Organization | Research Assistant |
| Maria Eva Bergaño       | Asopricor Association of Holistic Development, Colombia | No  | No  | Community Organization | Research Assistant |
| Marco Aurelio Campos    | Jerusalen Copaltri, Colombia                            | No  | No  | Community Organization | Research Assistant |
| Yesid Campos            | Tocaima de Asopricor, Columbia                          | No  | No  | Community Organization | Research Assistant |
| Wilson Cantor           | Tocaima Cordhupaz, Colombia                             | No  | No  | Community Organization | Research Assistant |
| Gonzalo Castiblanco     | Jerusalem de Asomager, Columbia                         | No  | No  | Community Organization | Research Assistant |
| Sonia Cocuname          | Agua de Dios, Colombia                                  | No  | No  | Community Organization | Research Assistant |
| Freddy Emilio Munoz     | Jerusalen Copaltri, Colombia                            | No  | No  | Community Organization | Research Assistant |
| Aureliano Paez          | Viota el Progreso, Colombia                             | No  | No  | Community Organization | Research Assistant |
| Emiliano Pedreros       | Jerusalem de Asomager, Colombia                         | No  | No  | Community Organization | Research Assistant |
| Endi Danovis Terreros   | Viota el Progreso, Colombia                             | No  | No  | Community Organization | Research Assistant |
| Guillermo Valero        | Tocaima de Asopricor, Colombia                          | No  | No  | Community Organization | Research Assistant |
| Janeth Valero           | Asopricor                                               | No  | No  | Community Organization | Research Assistant |
| Luis Eduardo Yela       | Tocaima Cordhupaz, Colombia                             | No  | No  | Community Organization | Research Assistant |

## Appendix 2: Thesis, Dissertation, and Postdoctoral Research Projects

### Masters

#### *Complete*

Chipo Kangayi. "Measuring and Mapping the Impact of the Social Economy: A Case of Co-operatives in Canada." MSc, Bioresource Policy, Business and Economics Department, University of Saskatchewan. Thesis completed December 2007

#### *In process*

Jose Reyes. "Recovery of the Collective Memory and Projection into the Future: ASOPRICOR." MBA in Community Economic Development, Cape Breton University

Robyn Webb. "Municipal Support for the Social Economy Sector" (working title). Masters in City Planning, University of Manitoba

Kama Soles. "Empowerment through Co-operation: Disability Solidarity in the Social Economy." Interdisciplinary MA Program, Concentration in Co-operative Studies, University of Saskatchewan

Michael Chartier. "The Communitarian Pedagogy of Watson Thomson." MEd, Department of Educational Foundations, College of Education, University of Saskatchewan

Karlah Rudolph. "Co-operative Response to Globalization of the Food Chain: Implications for the Emergence of a Sustainable Food System." Interdisciplinary MA Program, Concentration in Co-operative Studies, University of Saskatchewan

### Doctoral

#### *In process*

Sheila Gruner. "Understanding Indigenous Perspectives on the Social Economy: Fort Albany First Nation" (working title). PhD dissertation, Ontario Institute for Studies in Education

Mitch Diamontopoulos. "Globalization, Innovation, and Co-operative Development: The Cases of Saskatchewan and Quebec." PhD dissertation, Interdisciplinary PhD program, University of Saskatchewan

Robert Dobrohoczki. "Re-engaging Citizens: Co-operatives as Public Policy Instruments for Democratic Renewal." PhD dissertation, Interdisciplinary PhD program, University of Saskatchewan

Juanita Bacsu. “The Social Economy and Public Policy” (working title). PhD dissertation, Department of Political Science, University of Western Ontario

Wu Hao Tao. “Microcredit — Experience from Canada’s Credit Unions.” PhD, Bioresource Policy, Business and Economics Department, University of Saskatchewan

Jude Ortiz. “Concretizing Concepts as a Means of Increasing Community Resilience and Shifting Community Development Culture to Reflect a More Holistic Approach” (working title). University of the West of England, Bristol, UK

### **Post Doctoral**

#### *In process*

Catherine Leviten-Reid. “Quality and Human Resource Issues in Child Care in Canada: A Comparison of Co-operative, Non-profit, and For-profit Organizations.” Postdoctoral fellow, Centre for the Study of Co-operatives, University of Saskatchewan

### Appendix 3: Research Outputs — Descriptions 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 second-to-left-hand column.

As of the Mid-Term Report (3 March 2008), there are 56 projects.

Cluster 1 – 22  
 Cluster 2 – 4  
 Cluster 3 – 5  
 Cluster 4 – 12  
 Cluster 5 – 13  
 TOTAL 56

#### Colour Key

- Cluster 1
- Cluster 2
- Cluster 3
- Cluster 4
- Cluster 5

|   | Project Unit/<br>Cluster,<br>etc. | Project Title                               | Project Lead, Affiliation                                                                                                                                                               | Specific Project-Level<br>Research Objectives                                                                                                                                                                                                                                                   | Expected Deliverables                                                                                                           | Projected<br>Start Date | Projected<br>Delivery<br>Date | Projected<br>Expendi-<br>tures (\$) | Project # |
|---|-----------------------------------|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-------------------------|-------------------------------|-------------------------------------|-----------|
| 1 | Northern<br>Ontario (1)           | Community<br>Resilience Sault<br>Ste. Marie | Linda Savory-Gordon<br>(lead, Algoma University<br>College);<br>Co-investigator(s): Jude<br>Ortiz (intern, Algoma<br>University College); Gayle<br>Broad (Algoma University<br>College) | - Complete a portrait of Sault<br>Ste. Marie<br>- Increase awareness of<br>resilience<br>- Improve planning processes<br>to incorporate a holistic<br>approach (multisector<br>planning approach)<br>- Networking<br>- Build links among northern<br>Ontario communities<br>- Sharing knowledge | - Report<br>- Holistic planning<br>approach<br>- Increased awareness of<br>resiliency<br>- Conference presentation<br>in Hearst | 2006/<br>2007           | March<br>2009                 | \$85,000/<br>year (x3)              | CL1-01-NO |
| 2 | Northern                          | Community                                   | Jude Ortiz (lead, Algoma                                                                                                                                                                | - Increasing awareness of the                                                                                                                                                                                                                                                                   | - Report/article (report                                                                                                        | 2006/                   | April                         | \$11,000                            | CL5-01-NO |

|   |                      |                                                                                                                                                                                                                                 |                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                              |               |           |           |           |
|---|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|---------------|-----------|-----------|-----------|
|   | Ontario (5)          | Resilience and the Arts: The Socioeconomic Impact of the Arts in the City of Sault Ste. Marie                                                                                                                                   | University College);<br>Co-investigator(s): Gayle Broad (Algoma University College)                                                                  | socioeconomic impact of the arts in the city of Sault Ste. Marie<br>- Inform policy making                                                                                                                                                                                                                                                                                    | completed)                                                                                                                   | 2007          | 2007      |           |           |
| 3 | Northern Ontario (1) | Penokean Hills Farms Marketing Project                                                                                                                                                                                          | Alicia Mills (lead, marketing intern, Algoma University College);<br>Co-investigator(s): Gayle Broad (Algoma University College)                     | - Identify the demand for local beef (marketing study)<br>- Create a marketing strategy<br>- Increasing awareness of local beef<br>- Networking<br>- Sharing knowledge                                                                                                                                                                                                        | - Leading a marketing strategy<br>- Increased sales of local beef<br>- Increased awareness of the availability of local beef | 2006/<br>2007 | July 2007 | \$48,000  | CL1-02-NO |
| 4 | Northern Ontario (1) | Recovery of the Collective Memory and Projection into the Future: ASOPRICOR                                                                                                                                                     | José Reyes (lead intern, Cape Breton University);<br>Co-investigator(s): Gayle Broad (Algoma University College); Janeth Valero (ASOPRICOR)          | - Networking<br>- Building links between Canada and Colombia<br>- Sharing knowledge<br>- Strengthening social economy projects in Colombia                                                                                                                                                                                                                                    | - Journal articles<br>- Chapter in book<br>- Conference presentations                                                        | 2005/<br>2006 | 2010      | \$100,000 | CL1-03-NO |
| 5 | 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 University);<br>Co-investigator(s): Christian Howald and Elisabeth Labrie, student interns at Laurentian University | - Provide a better understanding of the contribution to the social economy made by Francophones outside Quebec, in the provinces of Ontario, Manitoba, and Saskatchewan, and identify the regional differences and commonalities<br>- Networking<br>- Building links between northern Ontario communities and communities in Manitoba and Saskatchewan<br>- Sharing knowledge | - Journal article<br>- Conference presentation                                                                               | 2006/<br>2007 | 2009      | \$31,000  | CL4-01-NO |

|   |                  |  |                    |              |                    |       |      |          |           |
|---|------------------|--|--------------------|--------------|--------------------|-------|------|----------|-----------|
| 6 | Northern Ontario |  | Gayle Broad (lead, | - Networking | - Influence policy | 2006/ | 2008 | \$15,000 | CL5-02-NO |
|---|------------------|--|--------------------|--------------|--------------------|-------|------|----------|-----------|

|   |                      |                                                         |                                                                                                                                                                               |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                  |               |                     |          |           |
|---|----------------------|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------------|----------|-----------|
|   | Ontario (5)          | Disability Support Program                              | Algoma University College);<br>Co-investigator(s):<br>Meghan Boston (student intern, Algoma University College); Madison Saunders (student intern, Algoma University College) | - Sharing knowledge<br>- Informing policy<br>- Identifying successful social enterprises                                                                                                                                                                                               | - Increase awareness of social enterprises                                                                                                                       | 2007          |                     |          |           |
| 7 | Northern Ontario (5) | Coalition for Algoma Passenger Trains                   | Linda Savory-Gordon (lead, Algoma University College);<br>Co-investigator(s): Diane Merini, Sharon Sayers (Algoma University College)                                         | - Networking<br>- Building links among northern Ontario communities<br>- Building links among Aboriginal and non-Aboriginal communities<br>- Improve passenger rail service in Northern Ontario<br>- Develop a regional tourism strategy based on rail corridor<br>- Sharing knowledge | - Influence policy<br>- Increase awareness of the importance of the train<br>- Meetings with stakeholders<br>- Opportunities / pre-feasibility study<br>- Report | 2006/<br>2007 | 2008                | \$65,000 | CL5-03-NO |
| 8 | Northern Ontario (1) | Garden River First Nation Performance of Hiawatha       | Alice Corbiere (Algoma University College),<br>Margot Francis (formerly Algoma University College, now Brock University), Karl Hele (University of Western Ontario)           | - Networking<br>- Increasing cultural awareness<br>- Sharing knowledge                                                                                                                                                                                                                 | - Performance of the play<br>- Report<br>- Lectures, papers                                                                                                      | 2006/<br>2007 | 2007                | \$5,000  | CL1-04-NO |
| 9 | Northern Ontario (1) | Developing and Retaining Human Capital in First Nations | Rosalind Johnston (lead, Algoma University College), Gayle Broad (Algoma University College)                                                                                  | - Networking<br>- Identifying push/pull factors<br>- Increasing awareness about human capital in First Nations<br>- Sharing knowledge                                                                                                                                                  | - Meetings with stakeholders<br>- Literature review                                                                                                              | April 2007    | June 2007 (phase 1) | \$3,000  | CL1-05-NO |

|    |                      |                                                                                       |                                                                                                                                                             |                                                                                                                                                                                                                                              |                                                                                                                                  |           |               |          |           |
|----|----------------------|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-----------|---------------|----------|-----------|
| 10 | Northern Ontario (1) | Women and Community Economic Development in Northern Ontario                          | Gayle Broad (lead, (Algoma University College); Rosalind Lockyer (PARO Centre for Women's Enterprise); Madison Saunders (intern, Algoma University College) | <ul style="list-style-type: none"> <li>- Networking</li> <li>- Building links among northern Ontario communities</li> <li>- Sharing knowledge</li> <li>- Increasing awareness of women in CED</li> </ul>                                     | - Conference                                                                                                                     | 2006/2007 | April 2008    | \$85,000 | CL1-06-NO |
| 11 | Northern Ontario (1) | Community Supported Agriculture (CSA) Project                                         | Cecilia Fernandez (lead, Algoma University College); Co-investigator(s): Miranda Mayhew (Algoma University College)                                         | <ul style="list-style-type: none"> <li>- Networking</li> <li>- Building links among northern Ontario communities</li> <li>- Sharing knowledge</li> <li>- Increasing awareness of local produce</li> </ul>                                    | <ul style="list-style-type: none"> <li>- CSA tool (manual on how to start a CSA)</li> <li>- Meeting with stakeholders</li> </ul> | 2006/2007 | March 2007    | \$2,000  | CL1-07-NO |
| 12 | Northern Ontario (1) | Aboriginal Women in Non-profits                                                       | Christine Sy (lead, Trent University), Gayle Broad (Algoma University College)                                                                              | <ul style="list-style-type: none"> <li>- Networking</li> <li>- Building links among northern Ontario communities</li> <li>- Sharing knowledge</li> <li>- Increasing understanding of Aboriginal women's experiences in nonprofits</li> </ul> | <ul style="list-style-type: none"> <li>- Article</li> <li>- Conference presentation</li> </ul>                                   | 2006/2007 | November 2007 | \$2,000  | CL1-08-NO |
| 13 | Northern Ontario (1) | Business Plan for Farmers                                                             | Gayle Broad (lead, Algoma University College); Co-investigator(s): David Thompson, student; Shannon Atkinson, student                                       | <ul style="list-style-type: none"> <li>- Create a business plan and marketing strategy</li> <li>- Networking</li> <li>- Sharing knowledge</li> </ul>                                                                                         | <ul style="list-style-type: none"> <li>- Increased sales of local beef</li> <li>- Development of a business plan</li> </ul>      | 2006/2007 | 2008          | \$37,000 | CL1-09-NO |
| 14 | Northern Ontario (1) | Understanding Indigenous Perspectives on the Social Economy: Fort Albany First Nation | Sheila Gruner (lead, scholarship recipient, Algoma University College); Co-investigator(s): Gayle Broad (Algoma University College)                         | <ul style="list-style-type: none"> <li>- Provide research training and support to Fort Albany First Nation community</li> <li>- Increase understanding of the social economy from indigenous perspectives</li> </ul>                         | <ul style="list-style-type: none"> <li>- Community presentations</li> <li>- Paper</li> <li>- Conference presentations</li> </ul> | 2007/2008 | 2009          | \$25,000 | CL1-10-NO |

|    |                                           |                                                        |                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |               |            |                                                      |           |
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| 15 | Winnipeg Inner-City Research Alliance (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 Winn.);<br>Co-investigator(s): Sandra Leone (formerly Inonge Aliaga, now Community Research Hub (CRH) Manager, Spence Neighbourhood Association); Joan Hay (House of Opportunities); Brock Legge (student, Univ. of Winn.) | <ul style="list-style-type: none"> <li>- Design Training Modules</li> <li>- Conduct Training</li> <li>- Link Workers to employers</li> <li>- Organize Community Learning Circles</li> <li>- Monitor work of CRH Workers</li> <li>- Establish working relations with University of Winnipeg, Social Planning Council of Winnipeg, Canadian Centre for Policy Alternatives (Manitoba)</li> <li>- Interview Residents</li> <li>- Conduct market survey</li> <li>- Evaluate Social enterprise</li> <li>- Organize workshops on policy implications</li> <li>- Academic Papers</li> </ul> | <ul style="list-style-type: none"> <li>- Market Feasibility Study (completed)</li> <li>- Business Plan (final draft stage)</li> <li>- 3 part-time research jobs (focus groups conducted and submitted, survey, transcription)</li> <li>- Brochure</li> <li>- Web site (in-progress)</li> <li>- 6 Modules prepared (8 planned)</li> <li>- Community Learning Circles (4 completed, 2 planned)</li> <li>- Resident Interview questionnaire (to be submitted for ethics review)</li> <li>- General Meetings of workers (2 completed)</li> <li>- Two academic papers</li> <li>- Two PowerPoint presentations: CRH and CRH and development</li> <li>- Two articles for popular Community Development periodicals</li> <li>- Final Evaluation and Report on CRH case study</li> </ul> | August 2006   | March 2008 | \$10,000 internship                                  | CL1-11-MB |
| 16 | Winnipeg Inner-City Research Alliance (5) | CED Policy Framework for Manitoba                      | Brendan Reimer (lead, Canadian CED Network, Prairies);<br>Co-investigator(s): John Loxley (Univ. of Man.); Daniel Simpson (intern, Univ. of Man.)                                                                                                                                                                         | <ul style="list-style-type: none"> <li>- Engage practitioners in developing a policy framework for the CED and social economy sector in Manitoba</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                          | <ul style="list-style-type: none"> <li>- Final project report for website</li> <li>- Conference presentations (national and local)</li> <li>- Article in policy journal</li> <li>- Final report</li> <li>- National and local presentations</li> <li>- 2-page policy position paper</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | November 2006 | March 2008 | \$17,000 internship and community salary replacement | CL5-04-MB |

|    |                                           |                                                                                                         |                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                |             |          |           |
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| 17 | Winnipeg Inner-City Research Alliance (1) | Harvest Moon Society Marketing Cooperative: Building Social Capital through an Alternative Food Economy | Stephane McLachlan (lead, Environment and Geography, University of Manitoba);<br>Co-investigator(s):<br>Jo-Lene Gardiner (Harvest Moon Society);<br>Colin Anderson (student, Environment and Geography, Univ. of Manitoba) | <ul style="list-style-type: none"> <li>- 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: <ul style="list-style-type: none"> <li>- Describe group dynamics and evolving nature of social cohesion and capital within this emerging rural social enterprise</li> <li>- Explore role of social capital in local sustainable food systems.</li> <li>- Evaluate role agricultural co-operatives play in managing risk and adapting to BSE and future stressors.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>- Literature review</li> <li>- Academic publications,</li> <li>- Conference papers</li> <li>- Communication Tools: <ul style="list-style-type: none"> <li>I: Website Development, related to research and as a communication tool for HMS marketing group</li> <li>II: Brochure</li> </ul> </li> <li>- Describing research, best practices</li> <li>- Press releases, articles for local and regional newspapers and TV</li> <li>- Workshops at Harvest Moon Festival regarding local food, social enterprise development, sustainable agriculture</li> <li>- Master's thesis</li> </ul> | May 2007       | May 2008    | \$17,000 | CL1-12-MB |
| 18 | Winnipeg Inner-City Research Alliance (5) | Building a Tax Policy Framework to Enable Co-operative Development                                      | Cindy Coker (lead, SEED Winnipeg);<br>Co-investigator(s): Chris Clamp (Southern New Hampshire University);<br>Monica Juarez Adeler (student, Univ. of Sask.)                                                               | <ul style="list-style-type: none"> <li>- To answer the question "what and how does tax policy enable co-operative development?"</li> <li>- To identify appropriate tax policy that played a key role in individual co-op development and growth of co-operative development and support organizations</li> <li>- To understand factors that contributed to development and sustainability of co-operative organizations</li> <li>- To make recommendations to stakeholders (i.e. government and co-op sector)</li> <li>- To share gained knowledge nationally</li> </ul>                                                                                                                                              | <ul style="list-style-type: none"> <li>- Final report</li> <li>- National and local presentations</li> <li>- Policy position papers</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | September 2007 | August 2008 | \$20,000 | CL5-05-MB |

|    |                                           |                                                                               |                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                              |           |                    |                    |           |
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| 19 | Winnipeg Inner-City Research Alliance (1) | Eat Where You Live: Building a Social Economy of Local Food in Western Canada | Joel Novek (lead, Dept. of Sociology, Univ. of Winn.)<br>Co-investigator(s): Shirley Thompson (Natural Resources Institute, Univ. of Man.); Kim Bailey (Mount Carmel Clinic); Paul Chorney (Manitoba Food Charter); Cara Nichols (student, Univ. of Man.); James Kornelson (student, Univ. of Man.) | <ul style="list-style-type: none"> <li>- To assess possibilities for improving local food security through the social economy with specific focus on Winnipeg and Saskatoon</li> <li>- To examine the obstacles faced by social enterprises and community organizations in the food sector</li> <li>- To offer means by which these obstacles may be overcome</li> </ul> | <ul style="list-style-type: none"> <li>- 2-3 publishable articles for academic journals and/or presentation at academic conferences</li> <li>- Master's thesis in City Planning</li> <li>- Summary report of major findings designed for organizations involved in food security.</li> </ul> | July 2007 | May 2008           | \$13,100           | CL1-13-MB |
| 20 | CUISR (4)                                 | Exploring the Social Economy in Saskatchewan: Rural Area                      | Isobel Findlay (Edwards School of Bus., Univ. of Sask./CUISR);<br>Co-investigators: Vision North; Quint Development Corporation; Child Hunger and Education Program; Lori Blondeau (student, Univ. of Sask.)                                                                                        | <ul style="list-style-type: none"> <li>- Mapping the social economy in a rural area of Saskatchewan</li> </ul>                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>- Clear identification of social economy actors</li> <li>- Report</li> <li>- Article</li> <li>- Presentations</li> </ul>                                                                                                                              | May 2006  | End of Summer 2006 | \$7,500 internship | CL4-02-SK |
| 21 | CUISR (4)                                 | Exploring the Social Economy in Saskatchewan: La Ronge                        | Isobel Findlay (Edwards School of Bus., Univ. of Sask./CUISR);<br>Co-investigators: Vision North; Quint Development Corporation; Child Hunger and Education Program; Robert Dobrohoczki (student, Centre for the Study of Co-operatives, Univ. of Sask.)                                            | <ul style="list-style-type: none"> <li>- Mapping the social economy in a northern setting in Saskatchewan</li> </ul>                                                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>- Clear identification of social economy actors</li> <li>- Report</li> <li>- Article</li> <li>- Presentations</li> </ul>                                                                                                                              | May 2006  | End of Summer 2006 | \$7,500 internship | CL4-03-SK |
| 22 | CUISR (4)                                 | Exploring the Social Economy in Saskatchewan: Saskatoon's Core Neighbourhoods | Isobel Findlay (lead, Edwards School of Bus., Univ. of Sask./CUISR);<br>Co-investigators: Vision North; Quint Development Corporation; Child Hunger and Education Program; Mitch Diamantopoulos (student, Univ. of Sask.)                                                                           | <ul style="list-style-type: none"> <li>- Mapping the social economy in an urban setting in Saskatchewan</li> </ul>                                                                                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>- Clear identification of social economy actors</li> <li>- Report</li> <li>- Article</li> <li>- Presentations</li> </ul>                                                                                                                              | May 2006  | End of Summer 2006 | \$7,500 internship | CL4-04-SK |

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| 23 | CUISR (1) | Aboriginal Funding Database                                                                                                        | Isobel Findlay (lead, Univ. of Sask./CUISR); Co-investigator(s): Dwayne Docken (Urban Aboriginal Strategy); Cara Spence and Karen Lynch (researchers)                                                                                                                                                 | <ul style="list-style-type: none"> <li>- Developing a database with Aboriginal funding available to Aboriginal community</li> </ul>                                                                                                                                        | <ul style="list-style-type: none"> <li>- Database posted at the Urban Aboriginal Strategy website</li> </ul>                                                                                                                                | January 2007 | March 2007 | \$15,000 | CL1-14-SK |
| 24 | CUISR (1) | A New Vision for Saskatchewan: Changing Lives and Systems Through Individualized Funding for People with Intellectual Disabilities | Isobel Findlay (lead, Edwards School of Bus., Univ. of Sask./CUISR); Co-investigator(s): Judy Hannah (Sask. Association for Community Living); Karen Lynch (researcher)                                                                                                                               | <ul style="list-style-type: none"> <li>- Identifying various models of individualized funding (IF) and individually funded services (IFS)</li> <li>- Identifying and addressing arguments against IF and IFS</li> </ul>                                                    | <ul style="list-style-type: none"> <li>- Clear understanding of IF and IFS models</li> <li>- Report</li> </ul>                                                                                                                              | January 2007 | April 2007 | \$ 9,000 | CL1-15-SK |
| 25 | CUISR (1) | Cypress Hills Abilities Centres, Inc.: Exploring Alternatives                                                                      | Cassandra Phillips (lead, Edwards School of Business, Univ. of Sask.); Co-Investigator: Swift Current Abilities Council; Chipso Kangayi (student, Univ. of Sask.)                                                                                                                                     | <ul style="list-style-type: none"> <li>- Identifying existing programs and services for persons with cross-disabilities in Swift Current and surrounding area</li> <li>- Examining feasibility of expanding programs and services for persons with disabilities</li> </ul> | <ul style="list-style-type: none"> <li>- Training for focus groups that work with persons with developmental disabilities and cross-disabilities</li> <li>- Materials for focus groups</li> <li>- Report</li> <li>- Presentation</li> </ul> | January 2008 | May 2008   | \$8,000  | CL1-16-SK |
| 26 | CUISR (1) | Advancing the Co-operative Sector: Mapping Development Needs of Co-ops in Emerging, Under-represented, and Struggling Sectors      | Isobel Findlay (lead, Edwards School of Bus., Univ. of Sask./CUISR); Co-investigator(s): Saskatchewan Co-operative Association; Prairie Labour Workers Co-op; Michael Chartier (student, Centre for the Study of Co-operatives, Univ. of Sask.); April Bourgeois (community intern, St. Mary's Univ.) | <ul style="list-style-type: none"> <li>- Identifying specific development needs of co-operatives operating in emerging, under-represented, or struggling sectors</li> <li>- Providing foundation for co-operative development communications project</li> </ul>            | <ul style="list-style-type: none"> <li>- Research report</li> </ul>                                                                                                                                                                         | May 2007     | May 2008   | \$11,000 | CL1-17-SK |

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| 27 | CUISR (3) | The Northern Saskatchewan Trappers Association: Moving Forward as a Co-operative Enterprise    | Isobel Findlay (lead, Edwards School of Bus., Univ. of Sask./CUISR);<br>Co-investigator(s): Northern Trappers Assoc.; Dwayne Pattison (student, Centre for the Study of Co-ops, Univ. of Sask.)                                                                             | - Exploring collaborative governance models, organizational communications, transparency and accountability, and the integration of traditional trapper values and worldviews                                                                               | - Research report                                  | May 2007   | March 2008  | \$6,000                                          | CL3-01-SK |
| 28 | CUISR (1) | Co-operative Development Program                                                               | Isobel Findlay (lead, Edwards School of Bus., Univ. of Sask./CUISR);<br>Co-investigator: Warren Crossman (Saskatchewan Co-operative Association)                                                                                                                            | - Analyzing and proposing strategies for co-operative development                                                                                                                                                                                           | - Report<br>- Additional outcomes to be determined | March 2008 | August 2008 | \$12,000 internship<br>\$5,000 community release | CL1-18-SK |
| 29 | CUISR (4) | Mapping Social Capital in a Community Development Network                                      | Michael Gertler (lead, Univ. of Sask.);<br>Co-investigators: Saskatchewan Economic Development Association; Karen Bonesky (South West Centre for Entrepreneurial Development); Jason Heit (intern, Univ. of Saskatchewan)                                                   | - Developing a model with tools and measures from which other communities can learn                                                                                                                                                                         | - Report<br>- Additional outcomes to be determined | March 2008 | March 2008  | \$5,000 internship                               | CL4-05-SK |
| 30 | CUISR (1) | Pre-Apprenticeship Training and Work for Incarcerated Youth: Literature and Environmental Scan | Isobel Findlay (Edwards School of Bus., Univ. of Sask./CUISR) and Darlene Lanceley (Department of Sociology, Univ. of Sask.);<br>Co-investigator(s): Saskatchewan Economic Development Association; Urban Aboriginal Strategy; Gloria Lee, (student, Univ. of Saskatchewan) | - To complete literature review and environmental scan of existing programs and support services to returning Aboriginal community members from incarceration in federal, provincial, and youth institutions<br>- To identify gaps in services and supports | - Research report                                  | May 2007   | March 2008  | \$6,000 internship                               | CL1-19-SK |

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| 31 | CUISR (1)                                 | Artisan Co-operative Business Development                                                               | Isobel Findlay (Edwards School of Business, Univ. of Sask./CUISR);<br>Co-investigator(s):<br>Thickwood Hills Business Learning Network; Arlene Bear (student, Univ. of Sask.)                                                                                   | <ul style="list-style-type: none"> <li>- To study organizational governance, communications, transparency and accountability, member engagement, organizational learning</li> <li>- To study the integration of traditional values and world views</li> </ul>                                                                                                                                                                                         | - Research report                                                                                                                                                                             | May 2007       | March 2008     | \$6,000 internship | CL1-20-SK |
| 32 | CUISR (5)                                 | Individualized Funding (IF) and Individually Funded Services (IFS) Demonstration Project: An Evaluation | Isobel Findlay (lead, Edwards School of Business, Univ. of Sask./CUISR);<br>Co-investigator(s): Judy Hannah (Saskatchewan Association for Community Living); Karen Lynch (researcher); Philip Knudtson (student, Arts and Sciences, University of Saskatchewan) | <ul style="list-style-type: none"> <li>- To understand the impact of IF and IFS on recipients (self-advocates or persons with intellectual disabilities), their families, relevant community members (personal aide attendants, service providers, etc.), and representatives of government bodies at both the local and provincial levels</li> <li>- To examine outcomes and impact on community structures, program delivery, and policy</li> </ul> | <ul style="list-style-type: none"> <li>- Clear understanding of IF and IFS models</li> <li>- Report</li> <li>- Presentations to diverse audiences (academic, non-academic, policy)</li> </ul> | Sept 2007      | July 2008      | \$13,000           | CL5-06-SK |
| 33 | Cluster 1 — Social Enterprise Development | The Contribution of Disability-Controlled Co-ops to the Social Economy                                  | Supervisors: Kathleen James-Cavan (Dept. of English, Univ. of Sask.); Brett Fairbairn (Dept. of History and Centre for the Study of Co-operatives, Univ. of Sask.); Kama Soles (MA student, Centre for the Study of Co-ops, Univ. of Sask.)                     | - To be determined as thesis research is refined                                                                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>- Master's Thesis</li> <li>- Presentations</li> </ul>                                                                                                  | September 2006 | September 2008 | \$24,000           | CL1-21    |

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| 34 | Cluster 1 —<br>Social Enterprise Development                          | Co-operative Marketing Options for Organic Agriculture             | Michael Gertler (lead, Univ. of Sask.);<br>Co-investigator(s): Walter Nisbet and Bill Rosher (Canadian Organic Certification Co-operative); Advancing Canadian Agriculture and Agri-food Saskatchewan Program; Jason Heit (intern, Univ. of Sask.)                                                                                                            | - Review relevant literature and inventory Saskatchewan experience in co-operative marketing of organic grains and specific crops.                                 | - Provide recommendations for co-operative enterprise<br>- Paper and Report<br>- Presentations at conferences and meetings                      | June 2007    | June 2008      | \$20,000            | CL1-22 |
| 35 | Cluster 2 —<br>Financing Strategies for Social Enterprise Development | Sustainable Financing for the Social Economy                       | Wanda Wuttunee (lead, Univ. of Man.);<br>Co-investigator(s): Russ Rothney (Assiniboine Credit Union); Lois Gray (student, Univ. of Man.)                                                                                                                                                                                                                      | - Phase I: To identify and describe the providers and types of financing instruments available to social economy organizations and enterprises in the study region | - Final report<br>- Articles in stakeholder publications/newsletters<br>- Info on websites and made available at public forums and conferences. | January 2007 | October 2007   | \$5,000 internship  | CL2-01 |
| 36 | Cluster 2 —<br>Financing Strategies for Social Enterprise Development | Financing of the Social Economy                                    | Wanda Wuttunee, (lead, University of Manitoba);<br>Co-investigators: Martin Chicilo (Affinity Credit Union); Russ Rothney (Assiniboine Credit Union); Lois Gray (student, Univ. of Man.)                                                                                                                                                                      | - Phase II: To identify models of sustainable social economy organizations                                                                                         | - Add to the examples of successfully financed social economy organizations<br>- Working paper                                                  | August 2007  | January 2008   | \$11,000 internship | CL2-02 |
| 37 | Cluster 2 —<br>Financing Strategies for Social Enterprise Development | An Economic Analysis of Canadian Credit Union Microfinance Schemes | Supervisor: Murray Fulton (lead, Bioresource Policy, Business and Economics Dept. and Centre for the Study of Co-ops, Univ. of Sask.); Martin Chicilo (Affinity Credit Union); Russ Rothney (Assiniboine Credit Union); Derek Gent, (VanCity Community Foundation); Wu Haotao (PhD student, Bioresource Policy, Business and Economics Dept., Univ. of Sask.) | - To examine the factors explaining performance of micro-finance loans extended by credit unions to social economy enterprises                                     | - PhD Thesis<br>- One academic conference presentation                                                                                          | 2006         | September 2008 | \$30,000            | CL2-03 |

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| 38 | Cluster 2 — Financing Strategies for Social Enterprise Development | Financing Aboriginal Enterprise Development: The Feasibility of Using Co-operative Models | Lou Hammond Ketilson (lead, Edwards School of Business and Centre for the Study of Co-operatives, Univ. of Sask.); Co-investigators: Michael Mills and David Elgie (Indian and Northern Affairs Canada); Kim Brown (University of Saskatchewan) | <ul style="list-style-type: none"> <li>- To explore the potential for AFIs to evolve by becoming credit unions or trust companies and the motivation to do so</li> <li>- To examine the process, challenges, and benefits of setting up Aboriginal credit unions</li> <li>- To determine the changes presently taking place in the credit union system</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>- Questionnaire</li> <li>- Report</li> <li>- Presentation</li> </ul>                                                                                                                                                                                                 | January 2008 | April 2008 | \$21,200                                                                                | CL2-04 |
| 39 | Cluster 3 — Governance of the Social Economy                       | Toolkit for Empowering Practices in Social Economy Governance and Planning                | Murray Fulton (lead, Bioresource Policy, Business, and Economics Department and Centre for the Study of Co-operatives, Univ. of Sask.); Quintin Fox, CCA                                                                                        | <ul style="list-style-type: none"> <li>- To create a website of downloadable resources for use in organizational training</li> <li>- To provide research and specific models that achieve participation/inclusion/sense of community ownership</li> <li>- To provide an overview of best governance practices in conventional models and compare similarities and differences with the social economy</li> <li>- To review learnings from Quebec multistakeholder co-operatives</li> <li>- To provide tools for standards of good governance</li> <li>- To define and map democratic values</li> <li>- To provide information for practical board training, board management, board-staff relations</li> <li>- To study cultural and governance barriers in governance planning created by language and socio-economic differences</li> <li>- To study the challenges in managing diversity</li> </ul> | <ul style="list-style-type: none"> <li>- Website with ready-to-use planning tools, participatory processes, checklists for governance tasks, etc.</li> <li>- Presentations</li> <li>- Case studies</li> <li>- Specially commissioned research papers designed to fill gaps in existing knowledge</li> </ul> | 2007         | 2010       | \$30,000 plus possibility of \$10,000 in outside sponsorships and in-kind contributions | CL3-02 |

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| 40 | 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.)                                                                                                                                                                                                                          | <ul style="list-style-type: none"> <li>- 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</li> <li>- To develop a practical way to understand and assess democratic character of organizations in the social economy</li> <li>- To produce a self-assessment questionnaire for use by organizations interested in democratic practice</li> </ul>                                                                                                                                                                       | <ul style="list-style-type: none"> <li>- Self-assessment questionnaire for use by organizations</li> <li>- Database of shared results</li> <li>- 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 about participants' ideas concerning democracy</li> </ul> | 2007 | 2009 | Covered by outside sources and in-kind contributions | CL3-03 |
| 41 | Cluster 3 — Governance of the Social Economy | Cognition and Governance in the Social Economy: Innovation in Multistake-holder Organizations | Brett Fairbairn (lead, Dept. of History and Centre for the Study of Co-operatives, Univ. of Sask.); Co-investigator(s): Marie Bouchard (Department of Organization & Human Resources, UQÀM); Murray Fulton (Dept. of Bioresource Policy, Business & Economics, Univ. of Sask.); Karlah Rudolph (MA student, Univ. of Sask.) | <ul style="list-style-type: none"> <li>- Examining how systems of governance help (or hinder) citizen-driven organizations to innovate in how they serve societal needs</li> <li>- Studying specific examples of social economy organizations to draw insights and lessons about the connections between governance and innovation in multi-stakeholder community environments; insights and lessons will be applicable for practitioners, academic researchers, and policy makers</li> <li>- Will also partially address questions about “best practices” in the social economy recently raised by two federal policy studies in Canada (PRI 2005; HRSDC 2006)</li> </ul> | <ul style="list-style-type: none"> <li>- Case studies</li> <li>- Presentations</li> <li>- Best practices</li> </ul>                                                                                                                                                                                                                                                                                         | 2007 | 2010 | \$123,930                                            | CL3-04 |

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| 42 | 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.)<br>Co-investigator: Robert Dobrohoczki (student, Centre for the Study of Co-operatives, Univ. of Sask.)                    | - To identify literature on collaborative governance models, to consider how they operate within existing policy, how to move pilots into mainstream policy, what are success factors (including epistemes and stakeholder relationships)                                                                                                            | - Research report                                                                                                    | May 2007 | Sept/Oct 2007 | \$6,000                                                                        | CL3-05 |
| 43 | Cluster 4 — Measuring & Mapping the Social Economy | Measuring and Mapping the Impact of the Social Economy: A Case of Co-operatives in Canada | Rose Olfert (University of Sask.), Mark Partridge (Ohio State Univ.);<br>Co-investigator(s): Albert Daost (Co-operatives Secretariat); Rhiannen Putt (Co-operatives Secretariat); Chipso Kangayi (MA student, Univ. of Sask.) | - To evaluate the impact of co-operatives on population change in the communities in which they are situated<br>- To provide an understanding of how co-operatives vary spatially<br>- To assess how the different types of co-operatives impact local communities<br>- To provide the visual depiction of the incidence and impact of co-operatives | - National Level maps of co-op incidence<br>- Workshop presentations<br>- Publishable project report<br>- MSc thesis | May 2006 | December 2007 | \$29,000                                                                       | CL4-06 |
| 44 | Cluster 4 — Measuring & Mapping the Social Economy | Assessing the Contributions of Co-operatives to Social Enterprise Development             | Roger Herman (Centre for the Study of Co-operatives, Univ. of Sask.);<br>Co-investigator: Juanita Bacsu (PhD student, Univ. of Western Ontario)                                                                               | - 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                                                                                                    |          | Fall 2008     | \$6,000                                                                        | CL4-07 |
| 45 | Cluster 4 — Measuring & Mapping the Social Economy | 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                                                                                                    |          | Summer 2007   | Expenses covered by Southern Ontario node; in kind contributions from our node | CL4-08 |

|    |                                                                                   |                                                                                              |                                                                                                                                                                                                                     |                                                                                                                                                                                                                                              |                                                                                                                                                        |           |                   |          |        |
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| 46 | Cluster 4 —<br>Measuring<br>& Mapping<br>the Social<br>Economy                    | Measuring the<br>Effectiveness of<br>Social<br>Enterprises                                   | Lou Hammond Ketilson<br>(lead, Edwards School of<br>Business and Centre for<br>the Study of Co-operatives,<br>Univ. of Sask.);<br>Co-investigator: Pat<br>Thomas (P.A Thomas<br>Chartered Accountant,<br>Saskatoon) | - To review social accounting<br>literature for applicability to<br>social enterprises<br>- To survey measurement<br>methods in use in the node                                                                                              | - Literature review<br>- Report of survey results<br>- Measurement toolkit                                                                             | Fall 2007 | Fall 2009         | \$30,000 | CL4-09 |
| 47 | Cluster 4 —<br>Measuring<br>& Mapping<br>the Social<br>Economy                    | Mapping the<br>Social Economy<br>of Manitoba and<br>Saskatchewan                             | Lou Hammond Ketilson<br>(lead, Edwards School of<br>Business and Centre for<br>the Study of Co-operatives,<br>Univ. of Sask.); Tom<br>Carter (University of<br>Manitoba)                                            | - To update two existing<br>databases, one on Winnipeg,<br>one in Saskatoon<br>- To measure the impact by<br>physically “mapping” the<br>not-for-profit organizations<br>and social enterprises<br>- Data collection may involve<br>a survey | - Maps showing location<br>by type<br>- Analysis of impact of<br>presence in neighbour-<br>hoods<br>- Journal article<br>- Conference<br>presentations |           | September<br>2009 | \$15,000 | CL4-10 |
| 48 | Cluster 4 —<br>Measuring<br>& Mapping<br>the Social<br>Economy                    | Mapping the<br>Impact of Credit<br>Unions in Canada                                          | Rose Olfert (C-RERL,<br>University of<br>Saskatchewan)                                                                                                                                                              | - To map the presence of<br>credit unions in Canada<br>- To assess geographic<br>spillovers in terms of<br>population growth and<br>retention                                                                                                | - Maps showing density<br>of credit unions in<br>Canada<br>- Full report                                                                               | June 2006 | September<br>2008 | \$10,000 | CL4-11 |
| 49 | Cluster 4 —<br>Measuring<br>& Mapping<br>the Social<br>Economy                    | Mapping the<br>Nature and<br>Extent of the<br>Social Economy<br>in Aboriginal<br>Communities | Lou Hammond Ketilson<br>(lead, Edwards School of<br>Business and Centre for<br>the Study of Co-operatives,<br>Univ. of Sask.);<br>Gayle Broad (Algoma<br>University College)                                        | - To document the types of<br>social economy organi-<br>zations in Northern Ontario,<br>Manitoba, and<br>Saskatchewan                                                                                                                        | - Case studies<br>- Meta-analysis of case<br>studies                                                                                                   |           | September<br>2009 | \$15,000 | CL4-12 |
| 50 | Cluster 5 —<br>Developing<br>Policy<br>Frameworks<br>for the<br>Social<br>Economy | Social Economy<br>Public Policy<br>Survey                                                    | Cristine de Clercy<br>(University of Western<br>Ontario); Brendan Reimer<br>(Canadian CED network,<br>Prairies)                                                                                                     | - To create an inventory of the<br>social economy policies of<br>the node                                                                                                                                                                    | - Book chapter<br>- Journal article<br>- Two conference papers<br>- General public<br>presentation                                                     |           | Summer<br>2009    | \$8,000  | CL5-07 |

|    |                                                                 |                                                                                                  |                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                            |  |                |          |        |
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| 51 | Cluster 5 — Developing Policy Frameworks for the Social Economy | Social Economy Leadership: Lessons in Organizational Entrepreneurship and Government Partnership | Cristine de Clercy (University of Western Ontario)                                                                                                                                                                          | <ul style="list-style-type: none"> <li>- To investigate what distinguishes sustainable from unsustainable policies</li> <li>- To study important inputs and institutions in social economy policy sustainability</li> <li>- To study how social economy groups challenge policy barriers and change them (as well as fail to change them)</li> <li>- To investigate how tax policy enables social economy development and how alternative tax policy options might foster social economy development</li> </ul> | <ul style="list-style-type: none"> <li>- Book</li> <li>- Journal article</li> <li>- Book chapter</li> <li>- Three conference papers</li> <li>- Public lecture</li> <li>- Two newspaper articles</li> </ul> |  | Fall 2009      | \$15,000 | CL5-08 |
| 52 | Cluster 5 — Developing Policy Frameworks for the Social Economy | The Promise and Potential of Worker Co-ops in Canada                                             | Co-Supervisors: L. Findlay and I. Findlay (Edwards School of Business and English Dept., Univ. of Saskatchewan); Mitch Diamantopoulos (PhD student, Co-op Studies Concentration, Interdisciplinary Program, Univ. of Sask.) | <ul style="list-style-type: none"> <li>- To examine the policy framework for the development of worker co-ops in Canada</li> </ul>                                                                                                                                                                                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>- PhD Thesis</li> <li>- One academic conference presentation</li> <li>- One journal article</li> </ul>                                                              |  | September 2009 | \$15,000 | CL5-09 |
| 53 | Cluster 5 — Developing Policy Frameworks for the Social Economy | Re-engaging Citizens: Co-operatives as Public Policy Instruments for Democratic Renewal          | Supervisor: Isobel Findlay (Edwards School of Business, Univ. of Sask.); Rob Dobrohoczki (PhD student, Co-op Studies Concentration, Interdisciplinary Program, Univ. of Sask.)                                              | <ul style="list-style-type: none"> <li>- To build a policy framework for developing the social economy</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                               | <ul style="list-style-type: none"> <li>- PhD Thesis</li> <li>- Three academic conference presentations</li> <li>- One journal article</li> </ul>                                                           |  | September 2009 | \$30,000 | CL5-10 |

|    |                                                                                   |                                                                                                                     |                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                           |                                                          |                |           |                               |        |
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| 54 | Cluster 5 —<br>Developing<br>Policy<br>Frameworks<br>for the<br>Social<br>Economy | Adult Education<br>and the Social<br>Economy: Re-<br>thinking the<br>Communitarian<br>Pedagogy of<br>Watson Thomson | Supervisor: Howard<br>Woodhouse (University<br>of Saskatchewan); Michael<br>Chartier (MA student,<br>Educational Foundations,<br>Univ. of Sask.)                    | - To examine the historical<br>role of adult education in<br>promoting co-operative<br>development                                                                                                                                                                                                                                                                                        | - MA Thesis<br>- One academic<br>conference presentation | June 2006      | June 2008 | \$12,000                      | CL5-11 |
| 55 | Cluster 5 —<br>Developing<br>Policy<br>Frameworks<br>for the<br>Social<br>Economy | The Social<br>Economy and<br>Public Policy                                                                          | Supervisor: Cristine de<br>Clercy (University of<br>Western Ontario);<br>Juanita Bascu (PhD<br>student, Dept. of Political<br>Science, Univ. of Western<br>Ontario) | - To study how governments<br>evaluate and measure the<br>social economy and thereby<br>come to value this sector                                                                                                                                                                                                                                                                         | - PhD Thesis<br>- One academic<br>presentation           | Fall 2007      | 2010      | \$45,000<br>(\$15,000<br>x 3) | CL1-12 |
| 56 | Cluster 5 —<br>Developing<br>Policy<br>Frameworks<br>for the<br>Social<br>Economy | Municipal<br>Government<br>Support of the<br>Social Economy<br>Sector: An<br>Analysis of Best<br>Practices          | Supervisor: Cristine de<br>Clercy (University of<br>Western Ontario); Robyn<br>Webb (MA student in City<br>Planning, Univ. of<br>Manitoba)                          | - To explore the relationship<br>between municipal govern-<br>ments, community econo-<br>mic development and the<br>social economy<br>- To more clearly identify the<br>unique role that municipal<br>policy plays in promoting<br>CED<br>- To point out gaps and<br>barriers that exist at the<br>municipal level<br>- To distinguish models of<br>best practices in municipal<br>policy | - MA Thesis<br>- One academic<br>presentation            | Summer<br>2007 | 2009      | \$23,000                      | CL1-13 |

## Appendix 3a: Projects Organized by Status

### *Completed*

The following completed projects 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
- Penokean Hills Marketing Project
- Developing and Retaining Human Capital in First Nations

The five research projects focus on urban, First Nations, 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 websites.

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
- A New Vision for Saskatchewan: Changing Lives and Systems through Individualized Funding for People With Intellectual Disabilities

One cluster 4 project has been completed. 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.

- Measuring and Mapping the Impact of the Social Economy: A Case of Co-operatives in Canada

### ***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 (now Murray Fulton), 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.

- Mapping Co-operatives and Credit Unions in Ontario
- Assessing the Contributions of Co-operatives to Social Enterprise Development
- Measuring the Effectiveness of Social Enterprises
- Mapping the Social Economy of Manitoba and Saskatchewan
- Mapping the Impact of Credit Unions in Canada

### ***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. Five new research projects work towards that goal.

- Business Plan for Farmers
- Ontario Disability Support Program
- Coalition of Algoma Passenger Trains
- Women and Community Economic Development in Northern Ontario
- Understanding Indigenous Perspectives on the Social Economy: Fort Albany First Nation

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. The work with Fort Albany First Nation will extend this understanding. 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. It will explore the effectiveness of utilizing community learning circles as the basis for network and enterprise development.

- 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 of 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 have 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 unserved communities. This includes research projects conducted in partnership with the Aboriginal community, which consider issues of importance to rural, remote northern, and institutionalized communities, and evaluating models for service delivery to members of the disability community.

- 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
- Mapping the Social Capital in a Community Development Network
- Cypress Hills Abilities Centres: Exploring Alternatives

- Individualized Funding and Individually Funded Services Demonstration Project: An Evaluation

Research reports are expected in the spring and summer of 2008.

### *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. A study of co-operative marketing models for organic grains, which will wind up in the spring of 2008, will add to a growing cluster of research projects focused on food security and sustainable production practises.

- The Contribution of Disability-Controlled Co-operatives to the Social Economy
- Co-operative Marketing options for Organic Agriculture

#### Cluster 2

Four 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. The last two examine the effectiveness of credit unions to serve underserved financial markets.

- Assessing the Contributions of Co-operatives to Social Enterprise Development
- Sustainable Financing for the Social Economy
- An Economic Analysis of Credit Union Microfinance Schemes
- Financing Aboriginal Economic Development: The Feasibility of Using Co-operative Models

#### Cluster 3

The first stage 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. The second project has just funded a master's student to develop case studies on multi-stakeholder governance models employed to support sustainable agriculture practices.

- Exploring Collaborative Governance Models
- Cognition and Governance in the Social Economy: Innovation in Multi-stakeholder Organizations

#### 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 master's 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

## **Appendix 4: List of Publications (in alphabetical order by category)**

### **Books**

Sousa, Jorge, and Roger Herman. 2008. *A Co-operative Dilemma: Converting Organizational Form*. Centre for the Study of Co-operatives, University of Saskatchewan (book, non peer reviewed, accepted)

### **Book Chapters**

Broad, Gayle, and Lou Hammond Ketilson. "Challenges in Mapping the Social Economy in Indigenous Communities in Canada." *In Methods and Indicators for Evaluating the Social and Co-operative Economy*, ed. Marie Bouchard. Peter Lang Publishing Group (peer reviewed, accepted)

Fairbairn, Brett. 2007. "From Farm to Community: Cooperatives in Alberta and Saskatchewan, 1905-2005." *In The Prairie West as Promised Land*, ed. Doug Francis and Chris Kitzan. Ottawa: Canadian Museum of Civilization (peer reviewed, accepted, forthcoming)

Fairbairn, Brett. 2007. "Imagination and the Future: Learning from Social Enterprises." *In The Self-Help Solution: Co-operative Renewal in Canadian Communities*, ed. Brett Fairbairn and Nora Russell (non peer reviewed, chapter complete, editing of book in process)

Fairbairn, Brett. 2007. "A Shift in Values: Credit Union Expansion by Conversion of Bank Branches." *In A Co-operative Dilemma: Converting Organizational Form*, ed. Jorge Sousa and Roger Herman. Saskatoon: Centre for the Study of Co-operatives (non peer reviewed, accepted)

Fairbairn, Brett. 2007. "Where We Stand: Place, Enterprise, and Community." *In The Self-Help Solution: Co-operative Renewal in Canadian Communities*, ed. Brett Fairbairn and Nora Russell (non peer reviewed, chapter complete, editing of book in process)

Hammond Ketilson, Lou. 2008. "To See Our Communities Come Alive Again With Pride": (Re)Inventing Co-operatives for First Nations' Needs." *The Self-Help Solution: Co-operative Renewal in Canadian Communities*, ed. Brett Fairbairn and Nora Russell (non peer reviewed, chapter complete, editing of book in process)

### **Book Review**

Bagaoui, Rachid. 2007. "Évaluation de l'article : micro entreprises informelles et cadre institutionnel." *La Revue économie et solidarité*

## Case Studies

*Note: We anticipate a large number of additional case studies arising from the identified research currently in process.*

Bagaoui, R. 2008. Francophone Monographs (30 case studies in progress)

### Ontario

La maison verte

ModElles

Parmi-Elles

Projet Bio-Com

Réseau de développement économique et d'employabilité de l'Ontario (RDEE)

Le centre de santé communautaire : projet Clinique du coin, projet biodiesel

La coopérative régionale Nipissing Sudbury

La coopérative Gencor

La coopérative de santé et de logement de la Rivière de Français

La coopérative du Domaine des pionniers

La coopérative de bleuets sauvages du Nord de l'Ontario

La coopérative agricole de Hearst

La coopérative agricole de Cochrane

La Fromagerie coopérative St-Albert

La Coopérative Radiophonique de Toronto

La Coopérative Hydro Embrun

La garderie coopérative Brin d'herbe

Les services pour handicaps de développement de Sudbury, le Centre Jarrett

Habitat For Humanity Sudbury District

### Manitoba

La coopérative des Chalets St Norbert

La coopérative Paroissiale St Joseph

La coopérative paroissiale de services publics de St Léon

La Garderie coopérative des bambins

La Garderie coopérative de Jolys

Cercle Molière, Saint-Boniface Manitoba

Festival du voyageur, Saint-Boniface Manitoba

Corporation de développement communautaire de Saint-Laurent de Manitoba

### Saskatchewan

La coopération francophone en Saskatchewan

La coopérative française du centre éducatif Gard'ami

La coopérative des publications fransaskoises, le journal L'eau vive

Broad, Gayle, and Madison Saunders. 2008. Charles Printing (Prescott-Russell) (non peer reviewed, completed)

Broad, Gayle, and Madison Saunders. 2008. COIN Food Services (Peterborough) (non peer reviewed, completed)

Broad, Gayle, and Madison Saunders. 2008. Jarrett Value 2 Cooperative (Sudbury) (non peer reviewed, completed)

Broad, Gayle, and Madison Saunders. 2008. Out of This World Café (Toronto) (non peer reviewed, completed)

### **Conference Proceedings**

Fairbairn, Brett. 2006. *Communities under Pressure: The Role of Co-operatives and the Social Economy*. Synthesis Report, June 2006. Ottawa: Policy Research Initiative.

### **Journal Articles**

Anderson, C.R., and S.M. Mclachlan. 2008. "Adaptive Responses to BSE in Canada: Implications for the Future of Canadian Cattle Producers. Mitigation and Adaptation Strategies for Global Change" (peer reviewed, in progress)

Fairbairn, Brett, with the assistance of Rob Dobrohoczki. 2007. "Credit Unions and the Construction of Locality: The Case of South Interlake Credit Union, Canada." *Journal of Co-operative Studies* (UK) (peer reviewed, submitted)

Novek, Joel, and Shirley Thompson. 2007. "Does Community Economic Development Foster Community Food Security? Case Studies from Winnipeg and Saskatoon." *Journal of Nutrition and Health* (peer reviewed, submitted)

Reyes, J., and G. Broad, G. 2008. "Recovery of the Collective Memory and Projection into the Future." *Action Research Journal*. (peer reviewed, in press)

### **Manual**

Mayhew, M., and C. Fernandez. 2007. *Community Supported Agriculture Manual*. Sault Ste. Marie, Ontario. Community Economic and Social Development, Algoma University College (non peer reviewed, complete)

Hammond Ketilson, Lou, and April Roberts. *A Took Kit for Developing Aboriginal Co-operatives*. Saskatoon. Centre for the Study of Co-operatives. (non peer reviewed, in progress)

### **Newsletters**

*Linking, Learning, Leveraging Newsletter*, update from the Centre for the Study of Co-operatives, summer 2007 (non peer reviewed, complete)

*Linking, Learning, Leveraging Newsletter*, update from the Centre for the Study of Co-operatives, winter 2008 (non peer reviewed, complete)

### **Poster Presentations**

Anderson, C.R. 2008. Farm Level and Collective Responses to The BSE Crisis. Presented at PrioNet Annual Scientific Conference, 3 February 2008 (complete)

Anderson, C.R., S.M. McLachlan, T. Stozek, and M.A. Alam. Producer Adaptive Responses to BSE. Presented at PrioNet Annual Conference, 17 February 2007 (complete)

Centre for the Study of Co-operatives. Poster presentation of Aboriginal Research initiatives at the Congress of the Humanities and Social Sciences, 28 May – 1 June 2007 (complete)

Community-University Institute for Social Research. Poster presentations of Saskatchewan research at the Linking, Learning, Leveraging provincial workshop on the social economy, Saskatoon, 5 December 2006 (complete)

Community-University Institute for Social Research, Community Economic and Social Development Unit, and Winnipeg Inner-City Research Alliance. Poster presentations of Northern Ontario, Manitoba, and Saskatchewan Regional Node research to the Linking, Learning, Leveraging Regional Symposium, Winnipeg, 18–22 February 2007 (complete)

### **Press Release**

Harvest Moon Festival press release featuring the local food initiative, 5 September 2007

### **Research Reports**

*Note: A research report will be produced in conjunction with each of the ongoing and proposed research projects; we anticipate fifty reports in total by the end of the LLL project.*

Bagaoui, R., Développement économique communautaire et économie sociale en Ontario: émergence, évolution et défis, L'Alliance de recherche universités-communautés (non peer reviewed, accepté)

Diamantopoulos, Mitch, and Isobel Findlay. 2007. *Growing Pains: Social Enterprise in Saskatoon's Core Neighbourhoods*. Saskatoon: Community-University Institute for Social Research (non peer reviewed, complete)

Fernandez, C., M. Mayhew, and B. Tarantini. 2006. *Buy Local Beef: Algoma Cooperative Beef Marketing Study*. Sault Ste. Marie, Ontario, Community Economic and Social Development, Algoma University College (non peer reviewed, complete)

Gray, Lois, Wanda Wuttunee, and Russ Rothney. 2007. *Financing Social Enterprise: A Scan of Financing Providers in the Manitoba, Saskatchewan and Northwestern Ontario Region* (non peer reviewed, complete)

Loxley, John, and Dan Simpson. 2007. *Government Policies Toward Community Economic Development and the Social Economy in Quebec and Manitoba*. A Report Prepared for the Canadian CED Network, amended October 2007 (non peer reviewed, complete)

Lynch, Karen, and Isobel M. Findlay. 2007. *A New Vision for Saskatchewan: Changing Lives and Systems through Individualized Funding for People with Intellectual Disabilities: A Research Report*. Saskatoon: Community-University Institute for Social Research (non peer reviewed, complete)

Lynch, Karen, Cara Spence, and Isobel M. Findlay. 2007. *Urban Aboriginal Strategy Funding Database: A Research Report*. Saskatoon: Community-University Institute for Social Research (non peer reviewed, complete)

Olfert, Rose. 2007. "Measuring and Mapping the Impact of Social Economy Enterprises: The Role of Co-ops in Community Population Growth." (non peer reviewed, submitted)

Ortiz, J. 2007. *The Socioeconomic Impact of the Arts in the City of Sault Ste. Marie*. Sault Ste. Marie, Ontario. Community Economic and Social Development, Algoma University College (non peer reviewed, complete)

Spence, Cara, and Isobel M. Findlay. 2007. *Evaluation of Saskatoon Urban Aboriginal Strategy: A Research Report Urban*. Saskatoon: Community-University Institute for Social Research (non peer reviewed, complete)

### **Video**

Anderson, C.R. 2007. *Building a Local Food Economy with Ken Meter*. Manitoba Food Charter (complete)

### **Webcast**

Corbiere, Alice, Rosalind Johnston, and José Reyes. 2007. "An Aboriginal Perspective on the Social Economy." (complete)

### **Web Publications**

Bagaoui, R. et Monique Beadoin, "Coopératives, développement économique communautaire et économie sociale en Ontario." Publié sur <http://conference.se-es.ca/wp-content/uploads/2007/11/d6-bagaoui-beadoin.pdf> (non peer reviewed, complete)

Fairbairn, Brett. 2006. Self-Assessment of Democratic Character in Organizations, Version 1.2. Published at [www.usaskstudies.coop/socialeconomy/files/self-assessment1.2Oct06.pdf](http://www.usaskstudies.coop/socialeconomy/files/self-assessment1.2Oct06.pdf) (non peer reviewed, complete)

Olfert, Rose, Chipo Kangayi, and Mark Partridge. 2007. "Measuring and Mapping the Impact of Social Economy Enterprises: The Role of Co-ops in Community Population Growth." Published at [http://crrl.usask.ca/See\\_site/maps.php](http://crrl.usask.ca/See_site/maps.php) (non peer reviewed, complete)

### **Websites**

<http://www.usaskstudies.coop/socialeconomy>. Website developed by the Centre for the Study of Co-operatives for the node

<http://www.harvestmoonfood.ca>. Website developed by the Winnipeg Inner-City Research Alliance for one of their projects

### **Working Papers**

Broad, Gayle, and Madison Saunders. 2008. *Social Enterprises and the Ontario Disability Support Program: A Policy Perspective on Employing Persons with Disabilities*. Prepared for The Canadian Community Economic Development Network (non peer reviewed, complete)

Gaikezhayongai, B., L. Savory-Gordon, S. Sayers, and D. Merini. 2007. *Coalition for Algoma Passenger Trains Pre-Feasibility Study*. Sault Ste. Marie, Ontario. Community Economic and Social Development, Algoma University College (non peer reviewed, complete)

Olfert, Rose. 2008 "Co-operatives and Rural Community Population Growth: A Canadian Study" (non peer reviewed, in progress)

Thompson, D., G. Broad, and C. Denomme. 2007. *Farmers Business Plan*. Sault Ste. Marie, Ontario. Community Economic and Social Development, Algoma University College (non peer reviewed, complete)

### Appendix 5: Partnerships — Number of Partners per Category

| Number of regional partners per centres |                    |                       |                      |           |                                                                                                                                                                                                                                                                                                                                                                                                                    |                     |           |
|-----------------------------------------|--------------------|-----------------------|----------------------|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----------|
| Year                                    | Federal Government | Provincial Government | Municipal Government | NGO       | Universities                                                                                                                                                                                                                                                                                                                                                                                                       | Co-operative Sector | Total     |
| <b>2004-2005</b>                        | 1                  | 2                     |                      | 18        | Univ. of Saskatchewan – 12<br>Univ. of Regina – 2<br>Univ. of Man. – 2<br>Univ. of Winnipeg – 3<br>Algoma Univ. Coll.,<br>Ont. – 2<br>Univ. of Toronto – 1<br>Univ. of Wisconsin,<br>USA – 2<br>UQAM, QC – 1<br>Mount Saint Vincent Univ.,<br>NS – 1<br>Univ. of Alberta – 1<br>Univ. of Victoria – 1<br>Ohio State Univ. – 1<br>Univ. of Maryland, College<br>Park, USA – 1<br>University Research<br>Centres – 6 | 8                   | <b>58</b> |
| <b>2005-2006</b>                        |                    |                       |                      | 16        | Univ. of Western Ont. – 2                                                                                                                                                                                                                                                                                                                                                                                          | 1                   | <b>19</b> |
| <b>2006-2007</b>                        | 1                  | 3                     | 2                    | 4         | Laurentian Univ., Ont. – 1<br>Southern New Hampshire<br>Univ., USA – 1<br>Red River College, Man. – 1<br>Univ. of Bristol, UK – 1                                                                                                                                                                                                                                                                                  | 1                   | <b>15</b> |
| <b>Total</b>                            | <b>2</b>           | <b>5</b>              | <b>2</b>             | <b>38</b> | <b>41</b>                                                                                                                                                                                                                                                                                                                                                                                                          | <b>10</b>           | <b>98</b> |

## Appendix 6: Academic and Community Partners

### ACADEMIC PARTNERS

**Rachid Bagaoui**, Laurentian University  
**Lynne Bell**, University of Saskatchewan  
**Marie Bouchard**, University of Québec at Montréal, Canada Research Chair on the Social Economy  
**Gayle Broad**, Algoma University College  
**Leslie Brown**, Mount Saint Vincent University  
**Thomas S. Carter**, University of Winnipeg, Canada Research Chair in Urban Change and Adaptation  
**Louise Clarke**, University of Saskatchewan  
**Cristine de Clercy**, University of Western Ontario  
**Brett Fairbairn**, University of Saskatchewan  
**Peter Ferguson**, University of Western Ontario  
**Isobel Findlay**, University of Saskatchewan  
**Murray Fulton**, University of Saskatchewan  
**Michael Gertler**, University of Saskatchewan  
**Ellen Goddard**, University of Alberta, Co-operative Chair in Agricultural Marketing and Business  
**Lou Hammond Ketilson**, University of Saskatchewan  
**Ian MacPherson**, University of Victoria, co-chair of the Canadian Social Economy Hub  
**Greg Marchildon**, University of Regina, Canada Research Chair in Public Policy and Economic History  
**Jessica Gordon Nembhard**, University of Maryland College Park  
**Brian Oleson**, University of Manitoba, Agribusiness Chair in Co-operatives and Marketing  
**Rose Olfert**, University of Saskatchewan  
**Mark Partridge**, University of Saskatchewan, Canada Research Chair in the New Rural Economy  
**Evelyn Peters**, University of Saskatchewan, Canada Research Chair in Identity and Diversity: The Aboriginal Experience  
**Jack Quarter**, University of Toronto  
**Robert Stirling**, University of Regina  
**Wanda Wuttunee**, University of Manitoba

### COMMUNITY PARTNERS

#### *Ontario Partners*

Canadian CED Network / Réseau canadien de DÉC (Ontario)  
Community Economic and Social Development unit, Algoma University College  
Ontario Co-operative Association  
Ontario Native Women's Association  
PARO Centre for Women's Enterprise

#### *Manitoba Partners*

Agriculture, Food and Rural Initiatives, Government of Manitoba, Winnipeg, MB  
Arctic Co-operatives Ltd.  
Assiniboine Credit Union  
Caisse Provencher Ltée.  
Canadian CED Network / Réseau canadien de DÉC (Prairies and Northern Territories)  
Credit Union Central of Manitoba  
Manitoba Cooperative Association Inc.  
Social Planning Council of Winnipeg  
Spence Neighbourhood Association Inc., Winnipeg  
Supporting Employment and Economic Development (SEED) Winnipeg Inc.  
University of Winnipeg  
Winnipeg Inner-City Research Alliance (WIRA)

#### *Saskatchewan Partners*

Canada Rural Economy Research Lab, University of Saskatchewan  
Child Hunger and Education Program  
Common Works Development Institute Inc.  
Community Action Co-op Regina Ltd.  
Community Futures Partners of Saskatchewan  
Community Development Society of Saskatchewan

Community Health Services (Saskatoon) Association Ltd.  
Community-University Institute for Social Research  
Credit Union Central of Saskatchewan  
First Nations Agricultural Council of Saskatchewan, Inc.\*  
QUINT Development Corporation  
Saskatchewan Abilities Council  
Saskatchewan Association for Community Living  
Saskatchewan Co-operative Association  
Saskatchewan Council for Community Development  
Saskatchewan Economic Developers Association  
Saskatchewan First Nations Wholesale Co-operative  
Saskatchewan Industry and Resources  
Saskatchewan Regional Economic and Co-operative Development  
First Sask Credit Union  
Saskatoon Tribal Council  
Saskatoon Urban Aboriginal Strategy  
Spruce River Research  
TRIBE Inc.  
United Way of Saskatoon

***National Partners***

British Columbia Co-operative Association  
Canadian Community Investment Network Co-operative  
Canadian Co-operative Association  
Canadian Worker Co-operative Federation  
Co-operatives Secretariat, Agriculture and Agri-Food Canada  
Co-op Ventures Workers Co-operative  
Kin Canada  
Vancity Community Foundation

***International Partners***

Asopricor — Association for the Holistic Development of Rural Communities, Colombia  
University of Wisconsin Center for Cooperatives\*  
Cooperation Works, USA  
International Organization of Industrial, Artisan, and Service Producers' Co-operatives (CICOPA), Belgium

|                                                                                   |                                                              |                                                         |                                                |
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## Appendix 7: Milestone Report (minus appendices)

### SOCIAL ECONOMY SUITE

#### NORTHERN ONTARIO, MANITOBA, AND SASKATCHEWAN REGIONAL NODE

#### MILESTONE REPORT

##### I. Identification

|                                                                             |                                                                                                                                                                                                                           |                 |          |
|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|----------|
| File Number<br>859-2005-0007                                                | Title: Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities / Réseaux, connaissances, synergies : entreprises sociales, économies intelligentes et communautés durables |                 |          |
| Report completed by:                                                        |                                                                                                                                                                                                                           |                 |          |
| Family Name: Hammond Ketilson                                               |                                                                                                                                                                                                                           | Given Name: Lou | Initials |
| Primary telephone number<br>Country Area Number Extension<br>1-306-966-8507 | Primary E-mail: hammondk@commerce.usask.ca                                                                                                                                                                                |                 |          |
| Date Submitted (dd/mm/yyyy) : 30/03/2007                                    |                                                                                                                                                                                                                           |                 |          |

##### 2. Formal Application Follow-up

2.1 Discuss any issues raised by the adjudication committee at the time of the grant decision, and how these issues have been addressed.

For a detailed summary of project activity since September 2005, please refer to Appendix 1, p. 19.

The Linking, Learning, Leveraging team is pleased that the committee judged that the proposal was meritorious. We accept as additional guidelines the several suggestions and minor reservations expressed by the committee. Specific actions planned or already addressed by the project are described following each item identified by the committee:

1. The governance protocol should be more specific.

Please see Appendix 3 (pp. 26–30) for a detailed description of the model that has been implemented to govern this project.

2. The evaluation framework should be more specific.

Evaluation procedures linked to each aspect of the Milestone Report have been identified in detail in the text of this document. Section 7 (below) describes the formal evaluation process planned for the end of year three of the project.

3. The project team requires better representation from the Northern Ontario region.

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 more than 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 Linking Learning Leveraging

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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 to continue its 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 MA student from Trent, has extended the academic depth of the Northern Ontario team. The addition of Rosalind Lockyer, Monique Beaudoin, and José Reyes has added depth on the community partnership side.

4. We recommend that the project team develop an international strategy.

Two international partners have been added to the membership of the Management Board: Dr. Will Bartlett from the School for Policy Studies at the University of Bristol, UK, and José Reyes, a member of the ASOPRICOR Co-operative in Colombia. In addition to contributing to the overall governance of the project, each of these partners will collaborate in the research of the node.

Dr. Bartlett's earlier research has focused on co-operatives in Italy and Spain and the economies of the former Yugoslav states. A colleague of his at Leeds, Virginie Perotin, and Dr. Bartlett are also beginning a research collaboration around French co-operatives. As a contribution to the work of the Northern Ontario, Manitoba, and Saskatchewan node, he has proposed to examine the social economy in eastern Europe. His research will address the emergence of the social economy in the transition countries of eastern Europe, outlining the developments and factors that have determined the different emerging patterns of the social economy. He will draw comparisons with the developments in the social economy in southern Europe (Italy and Spain) and northern Europe (UK and Scandinavia).

ASOPRICOR is a partner in the Northern Ontario research led by the Community Economic and Social Development Unit at Algoma University College. The addition of a community partner from Latin America will make a significant contribution to understanding the social economy in an international context. To date, much of the research on the social economy has derived from examples from the UK and Europe, but Latin America shares a number of both similarities and differences to the North American context that may provide some valuable learnings for the social economy suite. ASOPRICOR is a small association involving several hundred families who have developed a number of co-operatives and social enterprises, as well as several other responses to the marginalization of their communities by the economy of Colombia, and indeed, of all of Latin America. Some of the issues that we will explore in this collaborative inquiry include the impact of the historical and cultural context on social economy and social enterprise development; Indigenous perspectives on the social economy; and the development of respectful relations between and among cultural differences. As we struggle to define and better understand the social economy, a Latin American perspective on these and other issues should prove a valuable comparator to the Canadian experience.

3. Community and University Partnerships

3.1 Using the table below, identify any team members (community and university researchers, community partners, students, knowledge users) who have joined the team since the time of application. (See Appendix 2)

3.2 Append to your report a description of the node's planned or actual management/governance structure and Advisory Board(s) (including mandates). Include the names, affiliations and responsibilities of members. Be sure to describe such elements as: how integration of all participants will be ensured, particularly in the development of the research agenda; lessons learned about community-university partnership and how they relate to your partnership; how the balance in the partnership between community and university researchers will be ensured and assessed; mechanisms that will allow for partnerships to evolve and expand. (See Appendix 3)

3.3 Has your regional node established written agreements or protocols outlining partnership functioning?

- Yes (go to 3.3a)      ○ No (go to 3.3b)

3.3a What type(s) of written agreement(s) or protocol(s)? Check all that apply:

|                                                                                   |                                                              |                                                         |                                                |
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- Terms of Reference (See Appendix 4)
- Guiding Principles (See Appendix 4)
- Conflict-Resolution Mechanisms
- Resource-Allocation Principles
- Contracts (Please specify type/nature of contract): Research Partnership between ASOPRICOR and Algomu University College, Memoranda of Understanding, Subtransfer Agreement, Student Internship Contracts, and other general templates (See Appendix 4)
- Other(s) (Please specify): Band Council Resolution with Batchewana First Nation (See Appendix 4)

Please note that SSHRC may request copies of the documents for your file. (Attached as appendices)

3.3b If no written agreement or protocols have been established, explain how partnerships will be managed.

3.4 To date, has the team experienced management challenges with such things as ethics review, resource sharing, funds and personnel administration, publication policies? If so, describe how these issues were addressed (referring to written agreements or protocols as appropriate).

The project overall has experienced no particular challenges beyond the ongoing but rewarding one of any community-university research partnership: enormous investment of time and personnel (including community, academic, and administrative staff) in supporting the relationship building with community-based organizations, in engaging and supporting their participation in research definition and implementation, in training and supervising students in the field, and in stretching relatively few dollars. The period from October 2005 to February 2006 was devoted to creating the management and governance structure and reaching agreement on operational policies and project management roles and responsibilities. These agreements are set out in the Project Policy Manual (see Appendix 4, pp. 31–37).

#### **Ethics Review**

We initially received ethics approval for the project overall, which expedited ethics approval at all partner universities, a step necessary to set up accounts and receive research funds. All subsequent research must be vetted by the individual university Ethics Review Committees, and any work involving human subjects cannot begin until ethics approval has been received. So far this has not created any delays in the start-up of projects. In the past, however, some WIRA-sponsored participatory action research projects (where the methodology is developed as part of the research process as the project progresses and is, therefore, not yet developed at the time of ethics review) have encountered delays in the ethics approval process.

#### **Funds and Personnel Administration**

Memoranda of Understanding (MOU) have been signed with the two universities in Manitoba (Winnipeg and Manitoba) and one in Ontario (Algoma) where academic co-leads are located. We require one more MOU with an Ontario (Western) university. These MOUs have established the procedures for the administration of decentralized funds and associated reporting requirements. On the whole, the process of distributing funds to the project's sister universities has gone very smoothly, and internal processes and procedures at the respective universities have been supportive of project objectives.

In one case, however, the hourly rate to be paid to the student approved by the WIRA Executive Steering Committee (ESC) was challenged by the University of Winnipeg's Human Resources department, who felt that it was too high (higher than the standard range of pay for comparable work). Consultation with the HR department allowed the rate of pay to stand. Despite efforts to share decision-making power, and although the research partners have a certain degree of latitude in how their research project will operate (the WIRA ESC has a degree of decision-making power in this regard as well), there are certain university policies that can supersede the partners and ESC's decisions.

#### **Resource Sharing**

Division of project funds has been accomplished by allocating specified annual amounts to each cluster and provincial organization. These amounts have been allocated on an equitable basis, and each co-lead is aware of the funds that have been allocated to others. The relocation of a co-applicant from one university to another has presented a number of unanticipated challenges related to the relocation of funds. These problems have been identified and will be addressed using the Project Policy Manual as the guideline.

|                                                                                   |                                                              |                                                         |                                                |
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### Publication Policies

Research partners in northern Ontario have established a publication policy with ASOPRICOR Holistic Association to address their concerns regarding publication. The partner organization has a right to approve all materials prior to publication and to veto publication of certain items. This latter item addresses the highly conflictual context of Colombia, i.e., the safety of the partnering organization’s members could be compromised should certain information be released. Since outside researchers would not necessarily be able to determine what information could place people at risk, the community partner must have final say on all materials published. This actually conforms to the tri-council policy on ethics in conducting community-based research but may state it a bit more explicitly.

In Saskatchewan and Manitoba, existing protocol in the Memorandum of Understanding for researchers (see Appendix 4, pp. 84–85) sets out procedures for addressing issues related to community ownership of knowledge and copyright.

### 3.5 To date, has the team been successful in ensuring a balance between community-based and university-based representatives in the activities of the node? Provide supporting example(s).

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.

Decisions regarding research activities and the allocation of research funds are made by decision makers representing the community and academia. 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, who 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.

In conclusion, 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. We have had very good attendance at our regional symposia (January 2006: 75; February 2007: 44) and attendance at provincial workshops has been excellent in some locations, fair in others (Ontario, April 2006: 30 plus; ASOPRICOR in Colombia: three assemblies with 150 people at each; Saskatchewan, December 2006: 34).

On balance, 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.

### 3.6 PERFORMANCE MEASUREMENT AND EVALUATION – Community-University Partnerships: How do you plan to assess or measure the effectiveness of your management/governance structure? How will you demonstrate that your written agreements/protocols have been implemented?

|                                                                                   |                                                              |                                                         |                                                |
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We will be developing standardized evaluation forms that will be applied to all aspects related to the governance and management of the Linking, Learning, Leveraging project.

### **Governance**

The purpose of the governance structure is to ensure balanced representation as well as community and academic relevance and applicability of research themes and identified priorities. At the provincial level, balanced representation on the executive and advisory committees is intended to ensure that the full range of issues is taken into consideration during the adjudication of each research application, and that approved applications are solid in methodology, theory, and based in community reality.

The effectiveness of governance structures will be measured by a number of indicators.

1. Balanced participation
2. Degree of participation by all members (presence alone does not indicate participation) at research planning meetings and symposia in the process used to adjudicate research proposals in decisions made at the management-board level

Method: Representation at above gatherings. Ongoing evaluation of meetings, workshops and symposia. Scale items will include such items as the perceived level of comfort of members participating in workshops and meetings and the range of discussion during the adjudication process, perceived ability to influence decisions.

3. The success of approved research to affectively address community priorities
4. The strength of the partnerships in the approved research initiatives

Method: Evaluation upon completion of project. Scale items will ask perceptions regarding nature of partnerships within research groups and relevance of research objectives and outcomes.

### **Management**

The effectiveness of management structures will be measured by a number of indicators.

1. Decisions made at meetings are implemented.
2. Implementation of decisions occurs in a timely fashion
3. The administrative process for research projects and other activities runs smoothly and efficiently.
4. Communication within the project is comprehensive, effective, and timely.
5. Finances are managed well, within budgets, and according to established timelines.
6. The ability of the project administrators (overall and in each province) and community liaison directors to interpret SSHRC guidelines and regulations and ensure projects adhere to these guidelines.
7. The ability to develop effective dissemination of results

Method: Annual survey of management board members, and post-project survey of partners and students involved in research.

### **Demonstration of Implementation of Written Agreements or Protocols**

The Project Policy Manual provides guidelines for the functioning of the governance and management structure, as well as the roles and responsibilities of each member. To the extent that people are familiar with its contents, find it useful in understanding their roles and the expectations regarding the values and philosophy of the project, then it will have been successfully implemented.

In terms of research proposal development by applicants, it can be demonstrated that the protocols have been implemented by the degree of adherence to the guidelines. If all of the applications are “way off base,” then the requirements/guidelines have not been well communicated.

In terms of the research process, it can be demonstrated that the protocols have been implemented by the degree of collaboration within each research team, the level of engagement with community (as appropriate to the topic), and the degree of involvement and learning of students. Ultimately, this should lead to a comprehensive research report that sheds light on some aspect of the social economy (a demonstration of the implementation of the general principles of the initiative). Research is completed in a timely manner, on budget, and has built positive balanced relationships among partners involved.

Method: Annual survey of management board members, and post-project survey of partners and students involved in research.

## **4. Research and Knowledge Mobilization Training**

**4.1 Describe the anticipated or actual collaborative research skills that community and university researchers will acquire (or have already acquired) as a result of their participation in your regional node.**

Building collaboration into the process of developing a proposal and then working through the successful proposal requires planning and sensitivity to community needs. Researchers in this node are involved in processes of consultation that go beyond the usual research project. These collaborative efforts build consensus and community sensitivity. Our team’s interdisciplinary character requires researchers and community partners to move beyond their normal operational “silos” and consider alternative methods of collecting and interpreting information.

To the extent that community and university researchers engage in all aspects of the research, they both gain an appreciation for all the tasks that are part of the process. In addition to developing collaborative skills as they work on these particular tasks together, they develop a better understanding of each others’ perspectives, they develop a better working knowledge of participatory research approaches, they develop a sense of the potential of research and its application, and they gain a greater appreciation of the strengths that partnerships can bring to the research process. They also gain a better understanding of the importance of governance in partnership approaches to collaborative research, the importance of developing working guidelines, methods of conflict resolution, etc.

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

In Manitoba, student and community researchers will gain the following skills:

- community liaison
- 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.

**4.2 Indicate the anticipated number of research staff that will be participating in your regional node. (Please note that actual figures will be required in your midterm and final research reports.)**

Table 4.2.1: The number of students participating in the Northern Ontario, Manitoba, and Saskatchewan regional node

| STUDENTS      |            |          |
|---------------|------------|----------|
| Paid          | # Canadian | #Foreign |
| Undergraduate | 30         |          |

|                                                                                   |                                                              |                                                         |                                                |
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|               |                   |                 |
|---------------|-------------------|-----------------|
| Masters       | 20                |                 |
| Doctoral      | 10                | 1               |
| Postdoctoral  |                   |                 |
| <b>Unpaid</b> | <b># Canadian</b> | <b>#Foreign</b> |
| Undergraduate | 10                |                 |
| Masters       | 2                 |                 |
| Doctoral      |                   |                 |
| Postdoctoral  |                   |                 |

Table 4.2.2: Research Staff Participating in the Northern Ontario, Manitoba, and Saskatchewan Regional Node of the Social Economy Project (See Appendix 5)

4.3 Use the table below to indicate (✓) what specific applied research skills research staff can expect to acquire through their participation in your regional node.

| Skills                                                                            | Students       |         |          |               | Community Partners and other Research Staff |
|-----------------------------------------------------------------------------------|----------------|---------|----------|---------------|---------------------------------------------|
|                                                                                   | Under-graduate | Masters | Doctoral | Post-doctoral |                                             |
| <b>Research Design</b>                                                            |                |         |          |               |                                             |
| Participate in designing project                                                  | ✓              | ✓       | ✓        |               | ✓                                           |
| Write grant proposals                                                             | ✓              | ✓       | ✓        |               | ✓                                           |
| Design methodology                                                                | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Data Collection &amp; Analyses</b>                                             |                |         |          |               |                                             |
| Collect data or information                                                       | ✓              | ✓       | ✓        |               | ✓                                           |
| Analyse research results or content                                               | ✓              | ✓       | ✓        |               | ✓                                           |
| Manage databases                                                                  | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Presentation of Results</b>                                                    |                |         |          |               |                                             |
| Present research at conferences                                                   | ✓              | ✓       | ✓        |               | ✓                                           |
| Publish articles/books                                                            | ✓              | ✓       | ✓        |               | ✓                                           |
| Produce performance/exhibit                                                       | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Administrative Tasks</b>                                                       |                |         |          |               |                                             |
| Develop/monitor budgets                                                           | ✓              | ✓       | ✓        |               | ✓                                           |
| Provide admin support                                                             | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Application of Specific Skills</b>                                             |                |         |          |               |                                             |
| Design Web sites / programming                                                    | ✓              | ✓       | ✓        |               | ✓                                           |
| Specific skills (language, software)                                              | ✓              | ✓       | ✓        |               | ✓                                           |
| Translate/edit/proofread                                                          | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Interactions</b>                                                               |                |         |          |               |                                             |
| Organise conferences, workshops                                                   | ✓              | ✓       | ✓        |               | ✓                                           |
| Mentor/supervise other students                                                   | ✓              | ✓       | ✓        |               | ✓                                           |
| Liase with community stakeholders                                                 | ✓              | ✓       | ✓        |               | ✓                                           |
| Participate in mtgs. With co-researchers                                          | ✓              | ✓       | ✓        |               | ✓                                           |
| Participate in mtgs. With partners                                                | ✓              | ✓       | ✓        |               | ✓                                           |
| Work in interdisciplinary environment                                             | ✓              | ✓       | ✓        |               | ✓                                           |
| <b>Other (please specify)</b>                                                     |                |         |          |               |                                             |
| Develop Toolkit Suitable for Community Organizations and Trainers                 |                | ✓       |          |               | ✓                                           |
| Develop a Business Plan for Social Enterprise (undergraduate student will assist) | ✓              |         |          |               | ✓                                           |

4.4 Describe the degree to which research staff (students, community partners, others) are expected to participate in the regional node, including an indication of the depth of involvement and the range or diversity of opportunities that will be provided to them in order to help build their knowledge, expertise and research skills. Provide examples as appropriate.

In addition to being involved in all stages of the research process, research staff (students, staff, and community partners) are provided with opportunities to participate in the regional node through participation in: (1) discussion forums on the Linking Learning Leveraging website; (2) the annual provincial workshops; and (3) conferences directly related to their research.

|                                                                                   |                                                              |                                                         |                                                |
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In northern Ontario, weekly research discussion forums will be held throughout the academic year. Researchers will have the opportunity to develop skills through training, mentoring, and supervision. For example, in April 07, student researchers will have an opportunity to attend a conference on resiliency in forest-dependent communities in Hearst, a northern Ontario Francophone community. Two participants from the ASOPRICOR project in Colombia will be attending this conference. A group of researchers interested in food security and working with community-based organizations will also be meeting in April to examine opportunities to collaborate among Francophone, Indigenous, and Anglophone communities in northern Ontario as well as with the community researchers from Colombia.

In Saskatchewan, students and community partners will actively participate in the design of the research. Community partners will facilitate the collection of the data (organizing focus groups and interviews) for the students. Once the data is collected, community partners and researchers will discuss the analysis of the data together. Weekly updates from researchers will also keep community partners informed on literature reviews and the general write-up of the report. At the end of the project, both community partners and researchers will understand the process of community-based research, will have knowledge of research methodology, and also ideas regarding dissemination and communication.

#### 4.5 Please provide details of planned or actual university curriculum development that has been or will be generated as a result of the regional node's activities?

Faculty will incorporate the findings of their research as well as aspects of methodology into existing courses they teach. Their project work allows them to bring practical experience into the classroom, which is an important aspect of curriculum development. Students will also use the reports in class papers, thereby gaining knowledge of the social economy in their studies. Students who are directly involved in the project research will develop all the skills noted above, enhancing their knowledge but also skills relevant to obtaining long-term employment.

Curriculum has been or will be developed in the following program areas:

##### **Undergraduate**

- University of Saskatchewan — Management 498.3 Business and Community, the capstone course for the Management of Co-operatives major, Management of Social-Economy Organizations stream, College of Commerce
- Community Economic and Social Development (CESD) program, Algoma University College — Qualitative methods courses in both CESD and Sociology departments of Algoma University College are being adjusted to reflect new methodological learnings in community-based research methods. These qualitative methods courses will also be adjusted to reflect the experience gained in working with Indigenous communities. The CESD courses, including field placement courses, will also be adjusted to reflect the learnings gained from working with community groups and extending the social economy in the region and internationally. One “special topics in CESD” course on co-operatives as a CESD strategy will be offered in June 2007. The curriculum for this course is being designed by a member of one of the partners in the Social Economy project, OnCoop in Ontario.
- University of Winnipeg — Research from the project will contribute a module on social economy, social enterprise, and co-operatives to course content for 60.3110/3: Poverty-Focussed Development in the International Studies Program

##### **Graduate**

- Graduate student workshop on community-based research methods, Saskatchewan, May 2007
- University of Saskatchewan — Co-operatives and Sustainable Development, Co-operative Studies Concentration, Interdisciplinary Graduate Program
- University of Saskatchewan — Methods in Conducting Community-Based Research, Co-operative Studies Concentration, Interdisciplinary Graduate Program
- University of Saskatchewan — Aboriginal Economic Development, Concentration in Indigenous Management, MBA program, College of Commerce
- University of Western Ontario — Politics 542b: Public Policy, offered winter 2007. Concerns public policy and Canada's community and voluntary sector. Participation in the Social Economy project will enhance and deepen the instructor's ability to teach the course, as well as inform the curriculum content.

#### 4.6 PERFORMANCE MEASUREMENT AND EVALUATION – Research and Knowledge Mobilization Training and Development: How do you plan to assess or measure the degree to which researchers (both community- and university-based) have acquired collaborative research and knowledge mobilization skills as a result of your

regional node? How do you plan to assess or measure the degree to which research staff (students, community partners, others) participate in your regional node, as well as the impact of their participation? How will you demonstrate that research staff have acquired the applied research and knowledge-mobilization skills mentioned above?

### Acquired the Skills

A post-project assessment with a survey and an interview will be used to determine skill development. The project will use traditional as well as innovative measures of success of collaborative research and knowledge mobilization skills.

Sample indicators of collaborative research skills:

- number of meetings among partners
- number of meetings with community stakeholders
- identification of new methods/tools for extending the reach of action research into the community
- continued work in collaborative research projects or other similar initiatives

Sample indicators of knowledge mobilization skills: number of

- published articles by community partners
- academic presentations by community partners
- publications by academic partners in popular publications
- academic and practitioner-oriented conferences and workshops participated in
- conference posters and presentations
- articles in newspapers and magazines
- chapters in books, books
- websites, fact sheets
- public fora, community consultations
- brown-bag lunches
- research orientation packages for community and student interns
- leveraged research collaborations

### Degree of Participation

Sample indicators of participation of research staff in regional node:

- participation at regional symposiums, conferences, etc.
- number of collaborations among academics and practitioners project to project, within regions, and region to region
- time sheets describing these types of activities on a weekly basis for students

### Impact of Participation

Sample indicators of impact of participation:

- impact on individual personally and professionally
- impact on their organizations and/or communities – expressed interest by community partners to be involved in subsequent research projects
- impact on the research project itself — ability of project to continuously adapt to the emerging priorities of research staff

## 5. Research and Knowledge Production

5.1 Will your regional node be receiving any additional support (in-kind or \$) in order to pursue its research and knowledge production objectives? Indicate the source, the role of the organization or person in your regional node, and the nature and amount of support in the table below, excluding support already mentioned in your formal application. Indicate whether the support is confirmed (C) or anticipated (A).

| Source<br>(organization or person name) | Role<br>(partner, collaborator, other: specify) | Nature<br>(financial, intellectual, in-kind, other: specify) | Amount<br>(for financial contributions only) | Is support confirmed (C) or anticipated (A)? |
|-----------------------------------------|-------------------------------------------------|--------------------------------------------------------------|----------------------------------------------|----------------------------------------------|
| FedNor                                  | Other: funder of CESD                           | Financial                                                    | \$50,000                                     | C                                            |

|                                                                                   |                                                              |                                                         |                                                |
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|                                                                        |                                           |           |                     |   |
|------------------------------------------------------------------------|-------------------------------------------|-----------|---------------------|---|
| FedNor                                                                 | Other: funder of Francophone project/CESD | Financial | \$127,500 (approx.) | A |
| Ministry (Ontario) of Northern Development and Mines                   | Other: funder of CESD internships         | Financial | \$27,500            | C |
| Ministry (Ontario) of Northern Development and Mines                   | Other: funder of CESD internships         | Financial | \$110,000           | A |
| Community Development Corps.                                           | Other: funder of community organizations  | Financial | \$8,500             | C |
| Urban Aboriginal Strategy                                              | Partner                                   | Financial | \$15,500            | C |
| Saskatchewan Association for Community Living                          | Partner                                   | Financial | \$9,000             | C |
| Centre for the Study of Co-operatives                                  | Home of LLL/RCS                           | Financial | \$76,000            | C |
| Co-operatives Secretariat                                              | Other: project, conference                | Financial | \$23,000            | C |
| Canadian Co-operative Association                                      | Partner                                   | Financial | \$4,000             | C |
| Winnipeg Partnership Agreement (Province of Manitoba)                  | Other: funder of community organizations  | Financial | \$55,190            | C |
| Human Resources and Skills Development Canada — summer student program | Other: Francophone project                | Financial | \$4,000             | A |
| Association of Cooperative Educators                                   | Other: conference                         | Financial | \$13,500            | C |
| University of Saskatchewan                                             | Other: conference                         | Financial | \$2,500             | C |
| CCEDNet                                                                | Other: project                            | Financial | \$1,500             | C |
| ARUC (Quebec Regional Node)                                            | Other: conference                         | Financial | \$400               | C |
| Canadian Social Economy Hub                                            | Other: conference                         | Financial | \$1,000             | C |

5.2 Have community and university researchers applied for additional research funding to pursue the node's research projects? Indicate the primary applicant(s), source, and whether funding has been received in the table below.

| Primary applicant(s)<br>(last name, first name, title) | Role<br>(partner, collaborator, other – specify) | Source<br>(SSHRC, CIHR, NSERC, other – specify) | Amount requested | Amount awarded<br>(if applicable) |
|--------------------------------------------------------|--------------------------------------------------|-------------------------------------------------|------------------|-----------------------------------|
| Fairbairn, Brett, Professor                            | Co-applicant                                     | SSHRC                                           | \$178,500        |                                   |
| Murray Fulton, Professor                               | Co-applicant                                     | SSHRC                                           | \$99,710         |                                   |
| Roger Herman                                           | Collaborator                                     | CIDA                                            | \$20,000         |                                   |

5.3 To what degree are the resources available to your regional node sufficient to allow the team to achieve its objectives?

There are a number of areas where the initial budget underestimated the actual costs associated with the nature of the work necessary. These additional costs can be attributed to the size and linguistic and cultural diversity of the

|                                                                                   |                                                              |                                                         |                                                |
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project’s geographic region, and the additional administrative burden associated with community-university research collaborations. These additional costs are associated with:

- Network building — The purpose of our first symposium was to introduce participants to the project and to each other. As we began year two, we felt it important to continue to build our internal community, so we held a second symposium, supported by a portion of the funds planned for dissemination, thus reducing the amount available for the second conference planned for year four).
- International researchers —Involving international researchers is difficult when SSHRC does not fund their expenses. We are currently developing a number of proposals to other organizations, specifically CIDA, to support the international research.
- Translation and interpretation — Simultaneous interpretation and translation of publications is a significant issue. We have been able to secure funds from partner organizations for an upcoming international conference and continue to look for funds to support translation.
- Travel — A significant amount of travel is necessary for the principal investigator related to both project administration and knowledge-dissemination events. The Centre for the Study of Co-operatives has contributed additional funds to support the PI’s travel.
- Community liaison — The original proposal called for one community liaison, but three are required in the current management model. Both WIRA and CESD have provided matching funds to support these activities.
- Project funding — Many of the projects require more funds than are available through SSHRC. CESD has augmented the northern Ontario funds through applications to FedNor and Northern Development and Mines for internships. Several of the community groups have also submitted funding applications, particularly to Community Development Corporations. CESD also augments the funding of some projects through its consulting work to community groups. The Centre for the Study of Co-operatives has matched partner dollars to fund additional internships.

**5.4 PROGRAM OF RESEARCH:** Append to your report a brief overview of your regional node’s main research objectives, identifying any changes from those identified in the formal application. Provide a brief overview of the way in which the research team is organized (e.g., units, clusters, themes, teams, departments), as well as a detailed description of planned research projects. Please provide a similar template as the one suggested below. (See Appendices 6 and 7)

**5.5** Describe the anticipated or actual mechanisms in place to ensure that participants (i.e., from community-based organizations and universities) have input and influence on research conducted and on the knowledge generated by your regional node.

Please refer to Appendix 3 (Section 3.2: Management/Governance Structure and Advisory Boards, pp. 26–30) for details regarding how all participants will have input into governance as well as research conducted and knowledge generated.

### **Ensuring Integration of All Participants**

Project participants (co-applicants, collaborators, and partners) are invited to regional symposia and 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 is intended to facilitate the ongoing research planning, implementation, feedback and analysis, and dissemination process occurring within and among clusters.

Partner organizations are offering 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 fora provide mechanisms to maintain communication among all participants. Within the clusters, Internet and telephone conferences and the discussion fora are primary means through which research can be planned and implemented.

At the specific project level, regular meetings will be held to which participants will be invited to 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.

**5.6 PERFORMANCE MEASUREMENT AND EVALUATION – Research and Knowledge Production: How do you plan to track:**

- ➔ the execution of your planned research program?
- ➔ individual projects and their expected deliverables?
- ➔ the usefulness and quality of the research conducted (from an academic and community perspective)?

The principal investigator and project administrator will be monitoring the overall execution of the research program. This will be facilitated through the reports required from the academic partners administering the decentralized funds, as well as standardized activity reports completed by the co-leads/directors of the five clusters and three provincial organizations.

Internal tracking systems have been established at the various universities. At CESD, for example, each project has a proposed end date with a set of deliverables. All dates are on a calendar and are tracked internally by both the CESD department and the accounting department at Algoma University College. The co-directors meet with the community partners on a regular basis and provide supervision and support to all community-based researchers. Full reports on methodology are required of all researchers, both academic and community-based.

Within WIRA and CUISR, the progress of research projects is monitored by the research liaison and community liaison directors, who regularly check on progress, require a status report half-way through the work, and check on the status of work if projects are not completed on time. Upon completion of the work, the directors review the draft report and make suggestions for improvements, provide editing, and also discuss dissemination possibilities with the partnership team.

The usefulness and quality of the research conducted will be monitored by collecting information regarding: dissemination events; publications; media coverage; spin-off research initiatives; ability to leverage other money; and impact on policy development and program development, as both illustrate the policy relevance of the work.

In the longer term, research outputs will be examined for

- lasting effects in the community — the sustainability of the research network, for example; the use of information by community groups in efforts to influence policy; feedback indicating that tools developed through the project have been relevant and useful
- long-term outcomes for students — numbers successfully completing their programs, finding relevant jobs, pursuing additional graduate work, etc.

**6. Dissemination of Research Results**

**6.1 Has your regional node developed a formal knowledge-dissemination / communication plan?**

- Yes (please append document to your report) (**See Appendix 8**)
- No (go to 6.1a)

6.1a If not, describe plans for the development of a formal dissemination / communication plan, including anticipated completion date.

**6.2 Use the table below to indicate the number of knowledge dissemination mechanisms/tools/vehicles the team has already developed (D) or plans to develop (P).**

| Dissemination Mechanisms/Tools/Vehicles                                                                                 | Number Developed (D) | Number Planned (P) |
|-------------------------------------------------------------------------------------------------------------------------|----------------------|--------------------|
| Research tools (e.g. database, dataset, archive, directory, bibliography, concordance, physical collections, catalogue) | 2                    | 2                  |
| Web site                                                                                                                | 1                    |                    |
| Presentations (non-academic)                                                                                            | 2                    | 40                 |

|                                                                                   |                                                              |                                                         |                                                |
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|                                                                                                                                                                                                                                |   |       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-------|
| Conference presentations (academic)                                                                                                                                                                                            |   | 56    |
| Journal articles (academic)                                                                                                                                                                                                    |   | 15    |
| Books (academic)                                                                                                                                                                                                               |   | 4     |
| Public lectures or address                                                                                                                                                                                                     |   | 11    |
| TV/radio interviews                                                                                                                                                                                                            | 2 | 10    |
| Media products                                                                                                                                                                                                                 | 1 | 10    |
| TV broadcast (e.g., documentary, series)                                                                                                                                                                                       |   |       |
| Audio-visual material (e.g., video, film, sound recording.)                                                                                                                                                                    | 1 | 2     |
| Newspaper/magazine article(s)                                                                                                                                                                                                  |   | 7     |
| Textbook/educational aid                                                                                                                                                                                                       |   | 3     |
| New course(s)                                                                                                                                                                                                                  | 1 | 3*/** |
| New program(s) of study                                                                                                                                                                                                        |   |       |
| Performance (e.g., theatre, dance)                                                                                                                                                                                             |   |       |
| Advisory services (e.g., participation in task forces,<br>advisory committees)                                                                                                                                                 |   | 5     |
| Consultancy (e.g., research contracts)                                                                                                                                                                                         |   | 2     |
| <b>Other(s)</b> (please specify):<br>Book chapters<br>GIS maps<br>Individual project posters<br>* Univ. of Hearst is planning to offer CESD program in French<br>** U of S Interdisciplinary research methods graduate seminar |   |       |

6.3 Use the table below to indicate the number of knowledge-dissemination events that have already been held (H) or that you plan to hold (P). Also indicate whether the events are aimed at primarily academic or primarily non-academic audiences, or both.

| 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                           | 2                             | 5 |                                   | 4 | 3                                                   | 8 |
| Conference                         |                               | 0 |                                   |   |                                                     | 2 |
| Congress                           |                               |   |                                   |   |                                                     |   |
| Symposium                          |                               |   |                                   |   | 2                                                   |   |
| Meeting                            |                               | 3 |                                   | 3 | 5                                                   |   |
| <b>Other(s):</b> (please specify): |                               |   |                                   |   |                                                     |   |

6.4 Who will be the main audiences of the knowledge-dissemination efforts? Please check all that apply, then priority rank the top three identified audiences (#1, #2 and #3):

| Audience                                                    | Rank |
|-------------------------------------------------------------|------|
| <input checked="" type="radio"/> Academic and Other Experts | 3    |
| <input type="radio"/> Administrators                        |      |
| <input checked="" type="radio"/> Community Groups           |      |
| <input checked="" type="radio"/> Community Leaders          |      |
| <input checked="" type="radio"/> Decision Makers            |      |
| <input checked="" type="radio"/> Federal Government         |      |

|                                                                       |   |
|-----------------------------------------------------------------------|---|
| <input checked="" type="radio"/> General Public                       |   |
| <input type="radio"/> International Intergovernmental Body            |   |
| <input type="radio"/> International Organization                      |   |
| <input type="radio"/> International Research Communities              |   |
| <input checked="" type="radio"/> Learned Societies (discipline-based) |   |
| <input type="radio"/> Libraries, Museums, Archives                    |   |
| <input checked="" type="radio"/> Municipal Government                 |   |
| <input checked="" type="radio"/> Non-Profit Organizations             |   |
| <input checked="" type="radio"/> Policy-Makers                        | 2 |
| <input type="radio"/> Private Sector                                  |   |
| <input checked="" type="radio"/> Professionals/Practitioners          | 1 |
| <input checked="" type="radio"/> Provincial Government                |   |
| <input checked="" type="radio"/> Students: Undergraduate-Graduate     |   |
| <input type="radio"/> Unions                                          |   |
| <input type="radio"/> Universities                                    |   |
| <input type="radio"/> Foreign Government                              |   |
| <input type="radio"/> Informed Public                                 |   |
| <input type="radio"/> Media                                           |   |
| <input checked="" type="radio"/> <b>Other(s)</b> (please specify):    |   |

**6.5 Describe the anticipated or actual mechanisms in place to ensure that audiences have input and influence on research-dissemination activities organized by your regional node.**

Presentations of research findings will be made at a preliminary stage to community partners, who will assist with the analysis and provide feedback on the interpretation of results, which is ultimately incorporated into the final document. Draft reports will be circulated amongst the interviewees for input and guidance. Academic leads will provide guidance and feedback to student and community-based researchers. For policy consultations, we will ask participants what we should do with the information: how it should be presented, who it should be presented to, and what role they'd like to play in it.

**Examples**

**Community-University Institute for Social Research**

- CUISR has collaborated significantly with the Urban Aboriginal Strategy on research design, implementation, community consultation, and a communication plan.
- In pilot research conducted during the first year, interviewees reviewed drafts and gave feedback, which was incorporated in revisions.

**Winnipeg Inner-City Research Alliance**

- The following decision was made by those who attended the provincial workshop on 20 February 2007: Once research projects are complete or nearing completion, the findings will be presented at annual provincial workshops of the MB LLL/Social Economy group. Dissemination ideas already developed by the research team will be shared and then expanded upon/refined by the entire group, with the development of specific ideas and approaches appropriate to the findings and target audiences.

**Community Economic and Social Development Unit**

- CESD created the Community Supported Agriculture (CSA) Tool, a manual about how to start a CSA, with the feedback of community groups.

**6.6 PERFORMANCE MEASUREMENT AND EVALUATION – Knowledge Dissemination: How do you plan to track:**

- the implementation of your formal knowledge-dissemination / communication plan?

|                                                                                   |                                                              |                                                         |                                                |
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- the impact of audiences' input and influence on knowledge-dissemination activities?
- the impact of knowledge-dissemination activities on audiences?

### Implementation

The principal investigator and project administrator will be monitoring the overall implementation of the knowledge dissemination/communication plan. This will be facilitated through standardized activity reports completed by the co-leads/directors of the five clusters and three provincial organizations on an annual basis. Internal tracking systems will be established to generate the activity reports.

### Impact of Audience Input

Consultations will be held with the planned audience for research results to determine if they are satisfied with final output and the manner in which their input was integrated prior to publication or dissemination.

### Impact of Knowledge-Dissemination Activities on Audiences

Success will be measured by organizing a cross-sectoral symposium to evaluate the results of the Linking, Learning, Leveraging projects and focus discussion on the implications for policymaking. The goal will be a symposium that allows for meaningful dialogue among residents, community partners, and government, with each participating on an equal level.

In addition to the symposium, the project will track

- requests for information
- suggestions for or requests for other research initiatives
- funding of additional research
- initiatives, projects, and programs started as a result of research findings
- policy change that can be attributed to the influence of research findings (examples where research reports have been used to direct policy formation)

## 7. Performance Measurement and Evaluation

7.1 Provide any additional information on your regional node performance measurement and evaluation plans, not yet discussed in this report. For example, you may use this space to discuss plans for a formal evaluation of your regional node. Append any relevant documents to further describe your performance measurement and evaluation plans.

The research proposal included a commitment to conduct an assessment of the quality of the community-university partnership in an ongoing manner, specifically at the end of each year, by soliciting feedback from both community and university partners regarding the following areas: opportunities for genuine input into shaping and managing the research program; relevance of the research program to perceived needs and priorities; and value of outcomes gained from participating in the research partnership. It was also proposed that we conduct a thorough assessment of all aspects of the research network and its outcomes following the third year of the project.

We will focus our assessment on three main areas: (1) the impact on research linking community and university partners; (2) the effectiveness of knowledge transfer and knowledge sharing between community and university partners; and (3) the impact on the training of students, community-based researchers, and the wider community. In September 2008, we will establish a Review Steering Committee to develop guidelines and direction for the review process. The committee will be composed of an equal representation of community and academic partners, and will also involve representation from the Advisory Council. We will hire a Research Evaluator/Research Outcomes Analyst to undertake the evaluation of the Northern Ontario, Manitoba, and Saskatchewan Social Economy node's work. The process will include interviews with community group representatives, researchers, staff, and node leaders. It will also involve reviewing board minutes, publications, newsletters, the project's website, conference and workshop proceedings, and other relevant knowledge transfer venues. It is anticipated that stakeholders will attend a number of the node's events; information will be gathered from those in attendance.

### Framework for Evaluation

The node is considering an adaptation of a framework developed by Moote et al. (2001)\* to evaluate the processes used to engage the community in participatory decision making, research, and ownership. Moote et al. identify six key dimensions of successful community-based initiatives: inclusiveness, accessibility, transparency, mutual learning, adaptability, and collective vision.

|                                                                                   |                                                              |                                                         |                                                |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|------------------------------------------------|
|  | Social Sciences and Humanities<br>Research Council of Canada | Conseil de recherches en<br>sciences humaines du Canada | 350 Albert Street<br>Ottawa, Canada<br>K1P 6G4 |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|------------------------------------------------|

### **Inclusiveness**

To be effective, community-based processes must engage all stakeholders and give them equal voice and participation regardless of their size or influence in the community. Inclusiveness is not measured by the number of participants but rather by the representation of the diverse interests and views in the community and respects the spectrum of traditions, cultural concepts, and self-determination of community groups. The processes must be open, encourage participation, and respect diverse forms of knowledge systems.

### **Accessibility**

To ensure inclusiveness, processes must be accessible. Access is often defined narrowly as receiving an invitation and having the resources (human and financial) to attend meetings. This definition must be expanded to customizing the process to meet the diverse needs and communication styles of all stakeholders.

### **Transparency**

Processes need to be understandable to all stakeholders. The roles and responsibilities of all parties must be clear at the outset if a trusting and productive relationship is to be established and maintained.

### **Mutual Learning**

Mutual learning is best achieved through collective action. To be effective, program processes must promote inclusive and interactive learning among participants. Emphasis must be placed on activities that encourage participation by all interested stakeholders and ensure their perspectives are valued and considered in the decision-making process.

### **Adaptability**

Processes need to be flexible because of the complex and dynamic nature of social systems. Innovation and flexibility improve the quality of decision making. Continual monitoring of outcomes is necessary so that the project and its activities remain responsive to the diverse needs of the various interest groups. This monitoring of practices is best done collectively by all stakeholders so that the interests of all groups are addressed.

### **Collective Vision**

A clear, shared vision that represents the interests and values of all stakeholders is essential if all interested groups are to be vested members of the process. Trust and commitment are the foundations for collective action. Leadership must be creative and able to build bridges between different interests and perspectives, facilitating the establishment of networks between interest groups and strategic partners.

\* Moote, Margaret A., Beverly A. Brown, Eric Kingsley, Steven X. Lee, Steve Marshall, Donald E. Voth, and Gregg B. Walker. 2001. "Process: Redefining Relationships." *Journal of Sustainable Forestry* 12 (3/4):97–116.

## **Appendix 8: The Management Board and Advisory Boards/Committees/Councils**

### ***Management Board of the Linking, Learning, Leveraging Project***

- Lou Hammond Ketilson, principal investigator, Linking Learning Leveraging project; academic co-lead, Cluster 4; director, Centre for the Study of Co-operatives, Edwards School of Business, University of Saskatchewan
- Gayle Broad, academic co-lead, Cluster 1; director, Community Economic and Social Development unit (CESD), Algoma University College
- April Bourgeois, community co-lead, Cluster 1; Co-op Ventures Worker Co-op
- Wanda Wuttunee, academic co-lead, Cluster 2; acting head, Department of Native Studies, University of Manitoba
- Martin Chicilo, community co-lead, Cluster 2; community development officer, FirstSask Credit Union
- Murray Fulton, academic co-lead, Cluster 3; Bioresource Policy, Business and Economics Department, University of Saskatchewan
- Quintin Fox, community co-lead, Cluster 3; manager, Member Services, Canadian Co-operative Association
- Monique Beaudoin, community co-lead, Cluster 4; formerly with CCEDnet (Ontario), currently le Comité de recherche sur l'économie sociale du nord de l'Ontario (Northern Ontario Francophone Research Committee on the Social Economy)
- Christine de Clercy, academic co-lead, Cluster 5; associate professor, University of Western Ontario
- Brendan Reimer, community co-lead, Cluster 5; CCEDnet (Prairies and Northern Territories)
- Thomas Carter, University of Winnipeg; research liaison director, Winnipeg Inner-City Research Alliance (WIRA); Canada Research Chair in Urban Change and Adaptation
- Isobel Findlay, research director, Community-University Institute for Social Research, Social Economy Research Module, and chair, Social Economy Research Module Advisory Committee; Edwards School of Business, University of Saskatchewan

### ***Advisory Boards***

*Social Economy Research Module, Community-University Institute for Social Research (CUISR), University of Saskatchewan, Saskatoon*

- Chair: Isobel M. Findlay, CUISR Social Economy Research Module Advisory Committee; Edwards School of Business, University of Saskatchewan
- Len Usiskin, community co-director, CUISR; and executive director, QUINT Development Corporation
- Karen Archibald, executive director, Child Hunger and Education Program (CHEP)
- Lou Hammond Ketilson, director, Centre for the Study of Co-operatives, Edwards School of Business, University of Saskatchewan
- Louise Clarke, academic co-director, CUISR; and head, Industrial Relations and Organizational Behaviour, Edwards School of Business, University of Saskatchewan
- Michael Gertler, Sociology Department and Centre for the Study of Co-operatives, University of Saskatchewan
- Warren Weir, Edwards School of Business, University of Saskatchewan

CUISR's Advisory Committee is mandated:

- to liaise with academic and community partners
- to oversee research design and implementation (including ethics protocols)
- to oversee student internship hiring and supervision

- to host annual workshops to report on research findings, review project goals, engage partners in defining research directions
- to help organize regional workshops
- to write the calls for letters of intent based on partner priorities determined at workshops
- to adjudicate letters of intent based on public criteria
- to identify synergies and opportunities to leverage resources by connecting partner research interests
- to negotiate hosting and supervision of projects with community-based organizations
- to support ongoing evaluation

*Winnipeg Inner-City Research Alliance (WIRA), University of Winnipeg, Winnipeg*

WIRA Executive Steering Committee

Chair: James Christie, Theology, University of Winnipeg

Judith Harris, Menno Simons College, University of Winnipeg

Ken McCluskey, Education Department, University of Winnipeg

Jino Distasio, director, Institute of Urban Studies

Dan Prokopchuk, community resource co-ordinator, Community Services Department, City of Winnipeg

Jon Gunn, manager, Neighbourhood Programs, Intergovernmental Affairs, Province of Manitoba

Dale M. Watts, dean, Industrial Technologies, Red River College

Inonge Aliaga, executive director, Spence Neighbourhood Association

Wayne Helgason, executive director, Social Planning Council

Doug Edmond, director of Research, Planning and Technology, Winnipeg School Division

Cindy Coker, executive director, SEED Winnipeg

Kerry Murkin, research administrative officer, University of Winnipeg (nonvoting executive Steering Committee member)

The Winnipeg Inner-City Research Alliance's organizational structure is made up of three main components: the Executive Steering Committee, the Community Liaison Director, and the Research Liaison Director.

The balanced participation and composition of community and academic members on WIRA's governing body, the Executive Steering Committee (ESC), reflect the goal of promoting horizontal collaboration and sharing of resources, knowledge, and expertise. With CURA guidelines in mind, the assistance of the liaison directors, and based on research priorities gathered through community consultation, the ESC establishes WIRA's guiding principles, practices, research directions, and criteria for research proposal evaluations. Other responsibilities of the ESC include:

- adjudication of research proposals
- assistance in monitoring research projects
- contributions to planning public consultations, workshops, and other events
- provision of input into university curriculum development
- review of dissemination of research findings
- liaison with other levels of government and community partners
- and overseeing all other WIRA activities

The primary roles of the liaison directors are to

- ensure widespread familiarity of WIRA within the applicable community and academic arenas
- bring together community organizations and academics to form strong research partnerships
- facilitate the development of strong research applications by partnerships
- provide ongoing guidance to researchers
- play a leadership role in developing research agendas reflecting community needs
- ensure maximum community impact and dissemination of research findings
- and act in an advisory capacity to the Executive Steering Committee

*Community Economic and Social Development Unit (CESD), Algoma University College, Sault Ste. Marie*

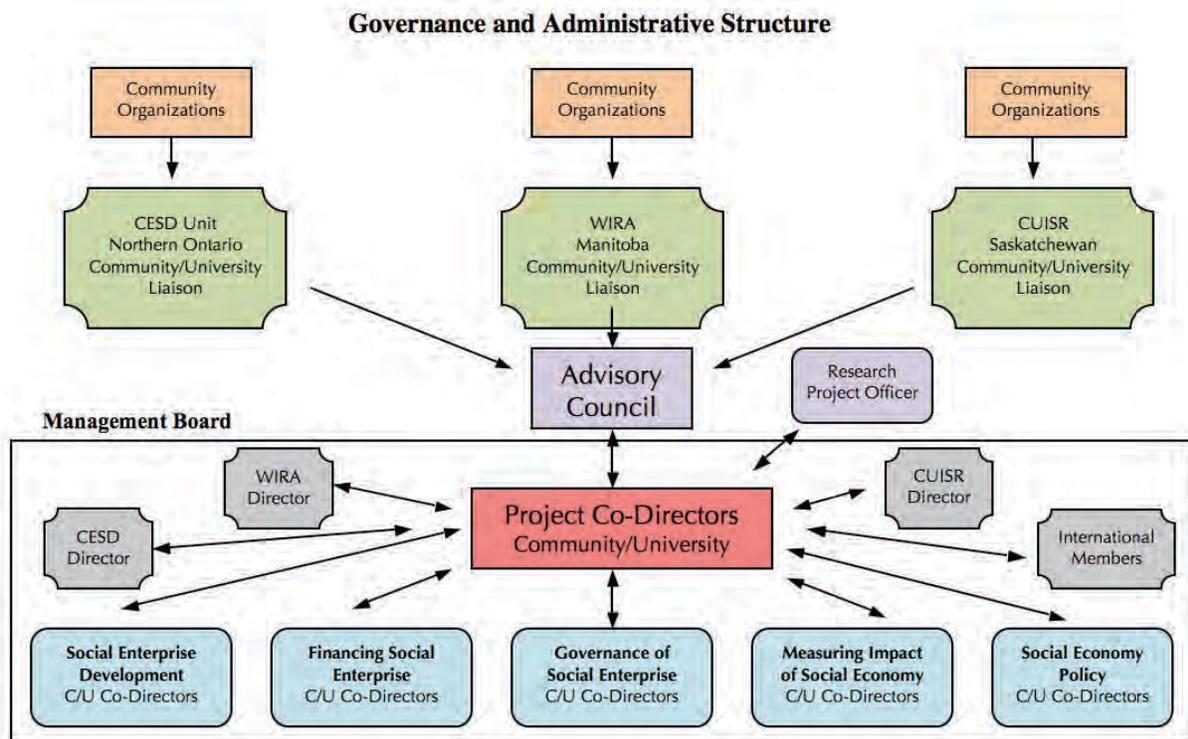
**CESD Co-ordinating Committee**

Gayle Broad, director, Community Economic and Social Development unit (CESD),  
Algoma University College

Linda Savory-Gordon, research co-ordinator

Alice Corbiere, research co-ordinator

Rosalind Johnston, executive assistant



## **Appendix 9 Document 1**

*Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities: Northern Ontario, Manitoba, Saskatchewan Social Economy Regional Node*

### **Proposed Policies**

#### ***1. Vision and Values: A Philosophy of Consultation and Integration***

All participants (co-applicants, collaborators, and partners) will be invited to symposia and workshops to share ideas. In the first year (2005-06), a conference of the full team and partners will jointly consider and develop the research propositions, concepts, questions, methodologies, and research. Workshops at the provincial level (northern Ontario, Manitoba, Saskatchewan) will be held annually to discuss preliminary research results. In the fourth year, a common symposium will include full presentation of the research outcomes from all clusters within the project. Between meetings, a project newsletter and web pages as well as Internet and telephone conferences and discussions will maintain communication among all participants.

Partner organizations are offering the time of senior management, board volunteers, and research and marketing staff as in-kind contributions to the project. These sector personnel will 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. Developing, sharing, and putting into practice mutually appealing approaches to evaluation will also be part of the team- and trust-building process.

While partners have been invited to collaborate around specific research clusters, this will not preclude their contributions to overall conception of the project and research modalities, sharing in evaluations and critiques, inter-organizational exchanges, and roles in developing both project communications and dissemination strategies. We will be flexible in responding to opportunities and constraints that become visible in the course of this joint endeavour. While striving to develop the capacities and working relationships of the overall team, we will continue to evaluate our partnership structure and seek additional academic and community participants where there is a need and an interest.

#### ***2. Decision Making***

The proposed administrative structure (see appendix A) reflects my intent to create a decentralized, responsive, transparent, representative, and accountable, decision making structure. My view is that as many decisions as possible should be made by those who are closest to the issue at hand; I do not wish to be involved in all decisions.

**a. Decision Making and Authority within the Node**

***Role of Principal Investigator***

I consider my role as principal investigator to be one of providing research, dissemination/publication and administrative leadership, as well as playing an important facilitative role.

- I may make suggestions for areas of research focus in the context of my knowledge of what is happening nationally in the regional nodes and the national hub, but I consider the final decisions to rest with cluster and provincial organization leadership.
- I will encourage cluster co-leads and provincial directors to develop an annual research and publication plan, and am willing to provide input but will not be overly directive. The publications may be specific to the cluster or provincial organization, or collaborative across the region.
- In consultation with the management board, I will establish a research and publication plan for the overall project.
- I do not require my name to appear on research reports or journal articles published within the cluster or at the provincial level, but I would like to have the opportunity to co-author if the publication is relevant to my area of research expertise.
- I do wish to be lead editor or co-editor in any books published by the project, whether published by the Centre for the Study of Co-operatives or some other press.

To assist me in my leadership and facilitative role, I have retained authority over resources allocated for regional conferences, communication within the node, dissemination of research and publications, and a limited pool of resources for research. To the extent that it made sense administratively, I have also retained centrally the Saskatchewan-directed resources for student conference travel and cluster co-lead and CUISR director travel to attend planning meetings.

***Role of the Management Board***

- The Management Board is comprised of the project co-directors, Lou Hammond Ketilson and Kate Waygood; the cluster academic and community co-leads; the directors of the provincial level organizations; and one (or possibly two) international representatives.

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- The Management Board is a decision making body whose responsibility it is to set policy and direction for the overall project, taking into consideration the input of the Advisory Council.
- The regional node project administrator, Lorraine Salt, is a non-voting member of the Management Board.
- The Management Board will meet in person at least once per year, preferably twice, and every three months by conference call. It is anticipated that more meetings will be needed in the first year of the project.

#### ***Role of the Regional Node Project Administrator***

- The regional node project administrator, Lorraine Salt, is responsible for
  - o Administering the accounts of the project, and for co-ordinating fund transfers to the relevant universities. She will be your primary point of contact for information regarding transfer agreements and relevant fund balances.
  - o Receiving annual reports related to the use of funds transferred to each university as specified in the transfer agreements.
  - o Preparing the annual project report to SSHRC.
  - o Co-ordinating communication for the project overall. This includes administration of listserves, the project webpage, and other mechanisms of communication as recommended by Lorraine or identified by the management board.
- The regional node project administrator is a non-voting member of the management board. She reports to the principal investigator.

#### ***Role of the Advisory Council***

- The Advisory Council is comprised of two community partners from each of Northern Ontario, Manitoba and Saskatchewan, plus two at-large community partners.
- The Advisory Council provides advice to the Management Board on the overall direction of the research, and will play a particularly important role in the ongoing evaluation of the project.
- The Advisory Council will meet at least three times during the length of the project.

**b. Decision Making And Authority within the Clusters**

- The academic co-leaders are individuals whose academic expertise is consistent with the cluster research focus. It is my expectation that the academic co-leads will provide 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 and degree 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 academic co-lead should consult with the community co-lead to determine the length of time that they are willing to take on this role.
- Unmatched release allowances and research time stipends have been allocated to reflect the additional responsibilities carried by the academic and community co-leads and directors of provincial organizations.
- It is suggested that the community co-lead should be a recipient of one of the two community releases allocated on an annual basis.
- When funds are transferred to universities other than the U of S, accounts will be set up in the name of the academic co-lead. Funds will be transferred on an annual basis. Transfer agreements will be arranged between the U of S research office and the relevant universities.
- Once we, as a group, have established agreement on the process to use in awarding scholarship and internship funds, decisions with regard to the timing and the allocation of these funds will rest within the clusters.
- If it comes to my attention that a cluster is unable to find candidates for one or more of the scholarships it has been awarded, I will propose a couple of options: first that the scholarship be awarded at a different level for instance, re-advertising it at the masters level rather than doctoral. If this fails to attract a new candidate, then, in consultation with the relevant cluster co-leads, I may consider reallocating the resource to a different cluster that is experiencing greater demand for scholarships or internships.
- Decisions regarding allocation of research funds, as well as funds for communications and supplies are at the discretion of the academic and community co-leads, keeping in mind the research priorities set by the cluster participants.

**c. Decision Making and Authority at the Provincial Level**

- The directors are individuals whose academic and/or community expertise is consistent with the social economy node research focus. It is my expectation that the directors will provide academic and administrative leadership at the provincial level.
- Unmatched release allowances and research time stipends have been allocated to reflect the additional responsibilities carried by the directors of provincial organizations.
- If one does not already exist, I would strongly encourage you to establish an advisory committee comprised of both academics and community partners.
- co-directors were already present in the existing organizational structure, or will be chosen based on their relevant expertise and background. Their role and degree of involvement may vary by province, but is expected to be that of a peer to the director in terms of research leadership. Depending on the organization, it is also possible that they will provide administrative leadership as well. The director should consult with the co-director to determine the length of time that they are willing to take on this role.
- It is suggested that the community co-director be considered for one of the two community releases allocated on an annual basis.
- When funds are transferred to universities other than the U of S, accounts will be set up in the name of the director. Funds will be transferred on an annual basis. Transfer agreements will be arranged between the U of S research office and the relevant universities.
- Once we, as a group, have established agreement on the process to use in awarding internship funds, decisions with regard to the timing and the allocation of these funds will rest within the clusters.
- If it comes to my attention that a provincial organization is unable to find candidates for the internships it has been awarded, I will propose a couple of options: first that the internship be awarded at a different level for instance, re-advertising it at the undergraduate level rather than masters. If over time, this fails to attract new candidates, then, in consultation with the relevant organizational co-directors, I may consider reallocating the undergraduate or masters level internship to a different organization, or doctoral level internship to another cluster, that is experiencing greater demand for the internships.

- The pacing of the awards – ie. how many four month, how many undergraduate as compared to graduate – is at the discretion of the provincial level organization, in keeping with the specific needs of community partners – within the maximum amount transferred each year. I would also encourage you to consult with the cluster co-leads to determine what their need for internships may be prior to advertising more broadly within the community.
- Doctoral level internships are administered by the provincial level organizations, with direction regarding focus provided by the relevant cluster co-leads. Clusters 1-4 have each been allocated two doctoral level internships.
- Decisions regarding allocation of other categories of funds are at the discretion of the co-directors to serve the needs of researchers and community partners at the provincial level.
- Regional meetings at the provincial level present annual opportunities to bring provincially based research teams together around a variety of themes. I would encourage you to use these as opportunities to build research skills, workshop relevant themes, showcase the work and ideas of community partners, and disseminate current research.

### ***3. Proposed Process for Awarding Scholarships***

- draft advertisements for masters and doctoral level scholarships are attached. Please customize these advertisements to suit the characteristics of your institutions
- scholarship amounts have been set as \$12,000 for a masters student and \$15,000 for a doctoral student respectively. These amounts may vary from what your institution has identified as appropriate. If there is a shortfall from the amount set by your institution, you will need to find the balance of funds from other sources. If at all possible, avoid reducing the number of scholarships awarded.
- Scholarships are to be awarded on a competitive basis, employing the standards of the relevant universities. A review committee for receiving and considering scholarship applications should be established within the clusters. I would suggest that for the governance, measurement and policy clusters, one committee be established; the composition of this committee should reflect expertise in the three research areas (perhaps the academic and community co-leads of each cluster).
- Allocation of scholarships by cluster is subject to demand (see above, 2b bullet 7).

#### ***4. Proposed Process for Awarding Internships***

- A draft application for internships is attached. Please customize this application to suit the characteristics of your institutions.
- Internships are to be awarded on a competitive basis, employing the process and standards of the relevant provincial organizations. A review committee for receiving and considering internship applications may already exist; if not, it should be established.
- Doctoral level internships are administered by the provincial level organizations, with direction regarding focus to be provided by the relevant cluster co-leads. Clusters 1-4 have each been allocated two doctoral level internships, but this is subject to reallocation depending on demand. (See above, 2c bullet 7).
- It has been the practise at CUISR to require the partnering community group to provide matching funds and/or in-kind support. Typically this has meant that expenses related to conducting the research (printing a survey, travel, photocopying, etc) would be covered by the community organization, as well as the provision of a supervisor for the work carried out by the intern.

The project's contribution would be the time of the intern, the community liaison's support in writing the application and during the project (within reason), and a faculty supervisor for the work.

I am strongly recommending that each provincial organization follow the same procedure.

#### ***5. Communication***

##### **a. Internal**

Communication among academic and community partners will be facilitated through the use of email, cluster –based and provincial-level list serves, an interactive project web page, and other mechanisms as identified by the regional node project administrator or the management board. Research partners will be encouraged to organize meetings in association with relevant conferences and meetings. Regional meetings at the provincial level present annual opportunities to bring together provincially based research teams.

The duties of the Management Board will be facilitated through conference calls and in-person meetings.

##### **b. External**

The project web site will play a major role in communicating the activities and outputs of the project. A project newsletter will be published at a minimum of once per year. In addition, many of our community partners have offered their newsletters and list serves

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as a venue for disseminating information regarding the project. I would encourage everyone to make suggestions in support of communicating as broadly as possible the outcomes of the project.

Everyone is encouraged to identify opportunities to present research and project outcomes at relevant conferences, local, regional, national and international. Unfortunately, the project has limited funds for participating in these events; these funds are administered centrally by the principal investigator. I would encourage those whose papers or proposals have been accepted for presentation to approach me on the availability of funds, as well as to look to other sources. Funds for student travel to conferences are administered through the provincial level organizations.

**Appendix 9 Document 2**  
**Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities**  
**Northern Ontario Region Research Proposals**

**RESEARCH PROPOSAL TEMPLATE**

**[Please contact Gayle Broad at: [broad@algonau.ca](mailto:broad@algonau.ca) prior to submission for any questions, or additional information]**

1. Cover page should include Title of research, contact name, address, telephone and email address of community organization.
2. CESD recognizes the need for community partners to explore questions that are of relevance to them, and reflective of their particular interests and needs in social economy development. Please provide an outline of the research which your group would like to do, including research questions (if they have been identified). The outline should be a max. of five pages.
3. Research proposals will be assessed based on the following criteria:
  - How does this project contribute to building the social economy in Northern Ontario?
  - How does this project contribute to CESD theory development and/or knowledge creation?
  - How does this project support the ecological, economic, social, political and/or cultural sustainability of Northern Ontario?
  - Does this project reflect the Indigenous and/or francophone communities of Northern Ontario?
  - How does the project contribute to building the community's capacity?
  - How will the project support the community in building networks and relationships with others engaged in the social economy, both within the region and externally?
  - How does the project contribute to building students' capacity?
  - How does the project address issues of poverty and marginalization?
  - How will this project be participatory and inclusive?
  - Will people be better off as a result of the project?
  - Will the project be sustainable enough to keep people in permanent jobs that will allow them to move out of poverty?
  - Will marginalized groups be more active in the economy as a result of the project?
  - How does this project consider the implications for organized labour and small businesses?
4. Funding provided by the SSHRC grant covers primarily student internships and scholarships.

Appendix 9 Document 3

*First Draft*  
*For discussion only*

**Outline for the Northern Ontario Research Program**

For the

**Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities**

Prepared by  
Gayle Broad, PhD  
Community Economic and  
Social Development Program (CESD)  
Algoma University College  
December 2, 2005

## **Background:**

Dr. Lou Hammond-Ketilson of the Centre for Cooperative Studies at the U. of Saskatchewan has been awarded funding of \$1.754 m. by the Social Sciences and Humanities Research Council of Canada (SSHRC) for a five-year research project entitled: *Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities*. Dr. Gayle Broad of the Community Economic and Social Development Program (CESD) of Algoma University College was a co-applicant on a May 2005 research grant application and has been invited to provide academic leadership to the project in Northern Ontario. The project is funded for the purposes of designing a regional node for research on the social economy, the region consisting of Saskatchewan, Manitoba and Northern Ontario. The funder encourages the development of linkages with other regions in Canada and internationally.

Based on a university-community research partnership model, the research project is designed to explore the social economy, sometimes referred to as the “third sector”, with the specific goal of developing “comprehensive profiles of social –economy organizations, highlighting innovative organizational structures, internal and external processes for community and member engagement, effective financing strategies and comprehensive measures of organizational and community outcomes”. The research project is particularly interested in exploring whether practices in the development, evolution and evaluation of social economy initiatives require cultural adaptation to meet the needs of diverse groups, particularly Indigenous peoples.

This draft proposal has been developed for discussion purposes between CESD and potential community partners.

## **Partnership Development:**

CESD and social economy organizations have much to gain from building a research partnership under the auspices of this funding. For CESD the community organizations are essential for the development of the research agenda of the project, and provide the site for knowledge creation. The sharing of knowledge by the community organizations will make a significant contribution to both the Canadian understanding of the social economy and enlarge international understanding of the phenomena.

For the community organizations, CESD can make a valuable contribution through:

- building the organizations’ capacity to conduct their own research
- the research findings and results.
- assistance in identifying the research questions and selecting the appropriate research design
- the provision of human resources
- training to conduct the research
- involvement in a network of the organizations in the initiative
- alliances with other organizations active in the social economy

- advancing the organizations' capacity to understand its own processes/community/capacity
- an opportunity to assist with the development of local economies
- the creation and sharing of knowledge
- further development of themselves as social enterprises
- an increased capacity to evaluate the social, economic and in some cases, environmental impacts of the initiative.

The results of this research will be of interest to other social economy enterprises as they develop and evolve. Many social economy enterprises in Canada are faced with the challenges of working in a relatively unknown sector, with little support for their initiatives. The results of this research will contribute significantly to the body of knowledge in this field.

CESD already has established a number of linkages across Northern Ontario, and the approach to this research is to build and expand upon its network. Specifically, through a careful allocation of resources, and leveraging additional resources, CESD will explore the diversity of the social economy in Northern Ontario with particular attention to Indigenous peoples and the francophone history of the region.

### **Research Approach:**

CESD recognizes the need for community partners to explore questions that are of relevance to them, and reflective of their particular interests and needs in social economy development. CESD suggests that the following criteria be used in identifying and selecting research projects:

- How does this project contribute to building the social economy in Northern Ontario?
- How does this project support the ecological, economic, social, political and/or cultural sustainability of Northern Ontario?
- How does the project contribute to building the community's capacity?
- How will the project support the community in building networks and relationships with others engaged in the social economy, both within the region and externally?
- How does the project contribute to building students' capacity?
- How does the project address issues of poverty and marginalization? Will people be better off as a result of the project? Will the project be sustainable enough to keep people in permanent jobs that will allow them to move out of poverty?
- Will marginalized groups be more active in the economy as a result of the project?
- How does this project consider the implications for organized labour and small businesses?

CESD will assist the partners in identifying their own research questions, and provide support in identifying appropriate research design and methodology to elicit valid answers. CESD (and the entire *Linking, Learning, Leveraging* project) will support the research through training, assistance in research dissemination, student researchers and regular consultation. There will be at least one face-to-face meeting per year and regular conference calls with other research partners funded through the SSHRC grant.

As community partners may require some additional funding to support their research projects, CESD students will also assist in developing funding applications to appropriate sources.

### **Proposed Research Partnerships:**

CESD proposes to approach a number of current partners to explore the potential for research. In some instances, CESD has already established research partnerships which may be augmented through the *Linking, Learning, Leveraging* project, while in other cases, new partnerships will be initiated.

A brief outline of some of the potential partnerships and projects is provided below:

### **Regional Partnerships:**

- *CCEDNet* – This national organization has been active in Northern Ontario through its Ontario staff person, Monique Beaudoin, located in Sudbury, one of the major Northern Ontario cities. Monique has already established a network of Northern Ontario social economy actors, and her strong roots in the francophone community will assist CESD in identifying potential partnerships within those communities. CESD has been a member of CCEDNet for several years and in May 2005 hosted the annual conference in Sault Ste. Marie, with approximately 500 participants from across the country. The resources required to support and explore the research potential of this network are yet to be determined, but are likely to require teleconference costs, given the distances between members. CCEDNet's contribution of staff time to participate in the network development will be a valuable support to the project.
- *Michipicoten First Nation* – CESD has already formed a partnership with this First Nation community located approximately 180 km. from Sault Ste. Marie along the North shore of Lake Superior. Together they are undertaking a jewellery-making project as an economic diversification strategy. Research on the development of this social enterprise (or some aspect of the development) may prove beneficial and interesting to both MFN and the *Linking, Learning, Leveraging* project.
- *Community Supported Agriculture (CSA)* – CESD faculty, together with community members and local farmers, have initiated a Sault Ste. Marie CSA project, based on a model of social economy development that is gaining interest

and acceptance as a method of supporting the local agriculture, while providing fresh, safe food to consumers. Research on this project, particularly with a view to exploring questions related to expansion and membership education, could provide some valuable guidance to others interested in using this model in hinterland areas (current research is based on more densely populated areas).

- *Algoma Cooperative Livestock Sales/Local Beef Marketing* – CESD is currently working with the Algoma Cooperative Livestock Sales to promote the marketing of local beef and other meat products. To date a number of challenges have been identified including processing capacity, governance issues at the community-share owned abattoir, varying commitments to quality by local farmers, and the recent exploration of a partnership with Garden River First Nation. Research related to the development of this initiative would be extremely valuable to other groups attempting a major social enterprise development.
- *Sault Ste. Marie Arts Council* – The SSM Arts Council has hired CESD (Jude Ortiz) to conduct a study on the impact of cultural events and activities on the economy of Sault Ste. Marie. This research would be similar in nature to a study conducted by CESD on non-profits and the economy of the Sault in 2004 (see .pdf file attached for full study).
- *The Ontario Women's Association (ONWA)* –ONWA indicated its support for the research initiative in a letter with the original SSHRC funding application. CESD will pursue this partnership development opportunity to ensure representation from this important group.
- *Education Network* – CESD already has strong ties with Northern College's CESD diploma program, Laurentian University, Sault College and Kenjgewin Teg Educational Institute. This network may be augmented by additional contacts at Nipissing University and Lakehead, and potentially Hearst. Research related to educational initiatives designed to support the social economy may provide valuable improvements to design and delivery of workshops and courses, and may leverage additional research support for the project.

### **National Partners:**

- *Understanding the Strengths of Indigenous Communities (USIC)*– CESD has partnerships with five First Nation communities from across Canada – Wagmatcook in Nova Scotia, Batchewana First Nation in Northern Ontario, Flying Dust in Saskatchewan, W'Sa'anic in BC, and Teslin Tlingit in the Yukon. These communities have been participating in a research project exploring the strengths of their communities, and have developed particular knowledge and expertise in the area of community engagement and social capital development. This group of First Nations can make a valuable contribution to the project through the development of materials arising from their research regarding these topics that may be shared with other community partners. In exchange, they will benefit from learning about other aspects of the social economy from the partners.

- Social Economy National Research Hub – SSHRC has funded a National hub as well as a regional one, and our research will be connected through networking and conferences, etc.
- CCEDNet – see regional above – CCEDNet is a national organization which also provides us with regional support

### **International Partner:**

- *Asopricor Cooperative* – CESD has established a relationship with Asopricor Cooperatives in Colombia, through a visit to the region four years ago, and the current enrollment of a member of Asopricor in the CESD program. It is an immensely successful cooperative in Colombia with a history of over 20 years of expansion and 600 member families involved in producer, marketing and social cooperatives. Its experience will add significantly to the research expected to be based primarily in Northern Ontario, Manitoba and Saskatchewan, serving both as a model of successful innovation and design, as well as for its incorporation of diversity in membership and successful conflict resolution.

### **Development of New Partnerships:**

The *Linking, Learning, Leveraging* research will provide opportunities for the development of new research partnerships across Northern Ontario in the social economy sector. It is hoped that between 15 – 18 research projects will result from the initiative and efforts will be made to ensure that at least one-third are conducted with francophone partners, and another third with Indigenous groups.

### **Budget:**

Budget allocations are currently being negotiated with the University of Saskatchewan, however, some items are non-negotiable. The budget provides for approximately 15 – 18 student interns over the five years of the research, at levels ranging from undergraduate to PhD. The budget also allocates funds for travel so that on an annual basis, the community partners and CESD can meet face-to-face, and on at least two occasions during the 5-year project duration, the entire region (Saskatchewan, Manitoba and Northern Ontario) can meet twice. Once the budget for Northern Ontario has been finalized, CESD will circulate a proposed allocation of the funds to community partners for discussion and amendment.

CESD views the SSHRC funding as “seed” funds and will work with community partners to develop other funding proposals and pursue alternate funding to ensure that the research scope is not unduly restricted by funding constraints. Some additional sources will include the FedNor and NOHFC youth internship for recent

postsecondary grads, as well as other FedNor and CDC administered grants. This will provide supporting funding particularly for travel within the region, which is not likely to be adequate with only the SSHRC funds.

CESD recognizes that community partners are likely to require resources to enable their participation, and the monies provided by SSHRC will be directed towards supporting partner participation. CESD is willing, however, to provide research training and support to community partners who may wish to conduct research using their own staff/volunteers/students drawn from their community(ies).

15 Jean Street  
Sault Ste Marie, ON  
P6B 481

March 6, 2007



Gayle Broad, PhD  
Assistant Professor  
Community Economic and Social Development  
Algoma University College  
1520 Queen Street East  
Sault Ste. Marie, ON  
P6A 2G4

Dear Gayle,

I am sending you a copy of the Band Council Resolution signed by Chief and Council in regards to the proposed "Generations and Diversity: Building Identity, Territory and Autonomy Between Indigenous Communities".

I would appreciate if I could be informed of what the next steps will be in this project.

Sincerely,

A handwritten signature in cursive script, appearing to read "Elaine McDonagh".

Elaine McDonagh  
Education Director  
Batchewana Learning Centre

cc. Chief and Council  
Jose A. Reyes

***“Generations and Diversity:  
Building Identity, Territory and Autonomy  
Between Indigenous Communities”***

**Proposal for Batchewana**

Like many First Nations in Canada, the Paez people of Colombia are a saga of determination against overwhelming odds. The Paez are Andean indigenous people in Southwest Colombia, from the province of Cauca, and have engaged in an important land and cultural struggle for many years, implementing important traditional economic practices, such as the ‘tul’ community gardens, as well as the recuperation of the Naza language. They face poverty, marginalization and conflict in their traditional lands.

Despite this, they have had many successes. In 2003 the Indigenous Network on Economies and Trade (INET) nominated the Nasa Project of the Paez Nation from Toribio for the Equator Prize. The project was short-listed and its coordinator Ezequiel Vitonas Talaga, attended the Conference of the Parties of the Convention on Biological Diversity where the Prize was handed out. Their project won first prize for their great achievements in the field of sustainable development.

In 2005, Jose Reyes, formerly of Colombia, began attending the Community Economic and Social Development (CESD) program at Algoma University College. He has been working with Ezequiel Vitonas and Sheila Gruner to arrange an exchange program between Indigenous youth in Canada, and Paez youth in the Cauca region. The goal is to develop an educational exchange called *“Generations and Diversity; Building Identity, Territory, and Autonomy between Indigenous Peoples”* to reflect common interests in learning about each others’ cultures while strengthening the relationships between youth and elders, men and women in the communities.

Recently, Ezequiel Vitonas visited Canada and met with representatives from the CESD program, as well as funders. The Canadian International Development Agency (CIDA) is prepared to provide funding to an Indigenous organization here to develop this exchange. Dr. Gayle Broad of the CESD programme contacted the Batchewana Learning Centre to determine whether the exchange could be arranged between the Paez Nation youth and youth from Batchewana First Nation. Algoma University College would assist with developing and supporting the exchange.

The intention of the exchange is to understand and address the multiple issues related to poverty, land, culture and autonomy through:

1. Strengthening relationships between men and women and among generations within indigenous communities in Canada and Colombia;
2. Exchanging experiences, lessons and knowledge among native communities involved in the project;
3. Determining the potential for a long-term cultural and educational exchange strategy led by native youth, adults and elders in Canada and Colombia.

The project will be divided into two phases, and contain two integrated components;

1) Getting to know each other, relationship building, exchanges of strategies development and long-term educational objectives. This first phase will include group development and educational strategies in Colombia and Canada, to be carried out in Canada at the earliest June 2007<sup>1</sup>.

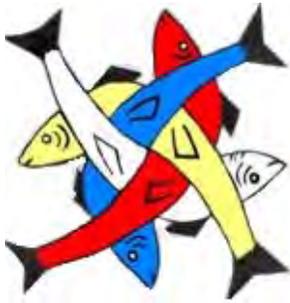
2) The second phase will include dissemination of the exchanges results in the participating communities, build on the educational exchange strategy, and will see the second *Generations and Diversity Exchange* carried out in Colombia, in November, 2007.

### **Resources, administration and benefits of the program**

- The Canadian International Development Agency (CIDA) is prepared to provide funding to an Indigenous organization here in Canada to develop this exchange with the Colombian counterparts
- If Batchewana First Nation supports this project in principle, the Batchewana Learning Centre would act as the administrative organization, and CIDA would provide funding to cover administrative costs.
- Algoma University College would provide support to the project in the form of training and research, and collaboration with the Colombian partners.
- Batchewana First Nation members, as well as members of other First Nation communities would be invited to participate in the exchange program.

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<sup>1</sup> These dates may have to be adjusted to meet the funder's requirements.



# ASOPRICOR

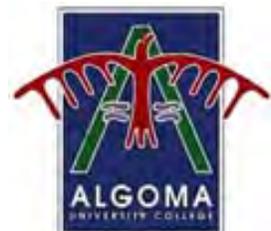
COLOMBIA

ASSOCIATION FOR THE HOLISTIC DEVELOPMENT  
OF RURAL AND URBAN COMMUNITIES  
25 YEARS OF HOPES AND STRUGGLES



**RECOVERY OF THE COLLECTIVE MEMORY AND PROJECTION OF THE FUTURE**  
REPORT 2006

RESEARCH PARTNERSHIP BETWEEN ASOPRICOR AND  
COMMUNITY ECONOMIC AND SOCIAL DEVELOPMENT PROGRAM  
(CESD)  
ALGOMA UNIVERSITY COLLEGE- CANADA



**APPENDIX A**

**RESEARCH PARTNERSHIP AGREEMENT BETWEEN ASOPRICOR & ALGOMA**

**Research Partnership agreement between Asopricor Association for Holistic Development, Colombia & Community Economic and Social Development Program, Algoma University College (November 1, 2005)**

**Background:**

Dr. Gayle Broad of the Community Economic and Social Development Program (CESD) of Algoma University College was a co-applicant on a May 2005 research grant application with Dr. Lou Hammond-Ketilson of the Centre for Cooperative Studies at the U. of Saskatchewan. Funding for the research project was obtained from the Social Sciences and Humanities Research Council of Canada (SSHRC) for a five-year project entitled: Linking, Learning, Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities.

The research project is designed to explore the social economy, sometimes referred to as the “third sector” as distinct from government and private enterprise. The specific goal of the project is to develop “comprehensive profiles of social –economy organizations, highlighting innovative organizational structures, internal and external processes for community and member engagement, effective financing strategies and comprehensive measures of organizational and community outcomes”. The research project is particularly interested in exploring whether practices in the development, evolution and evaluation of social economy initiatives require cultural adaptation to meet the needs of diverse groups.

Asopricor Association of Holistic Development which includes different types of projects and organizations in twelve municipalities in Colombia is immensely successful with a history of over 20 years of expansion and member development. The Association includes several different types of organizations such as cooperatives, women’s and youth groups, with a broad diversity of people including Afro-Colombians, Indigenous and Métis. Its experience will add significantly to the research expected to be based primarily in Northern Ontario, Manitoba and Saskatchewan, Canada, serving both as a model of successful innovation and design, as well as incorporation of diversity.

**Partnership Benefits:**

CESD and Asopricor have much to gain from building a research partnership. For CESD, Asopricor can provide an example of a highly-successful community-based social enterprise which has developed in adverse and conflictive circumstances. Six hundred families participate in the Asopricor Association which includes a broad range of cooperatives such as producer cooperatives, marketing cooperatives, women-only coops, and co-op stores. Research which demonstrates the development of the co-operative relations between the diverse members of this group will make a significant contribution to the Canadian understanding of the social economy in the international context.

For Asopricor, CESD can make a valuable contribution in at least two areas, both through building the organization’s capacity to conduct its own research, and through the research results. Using a participatory action research (PAR) model, Asopricor members will develop their own research questions, centering on

## Appendix 9 Document 5

*J. Reyes Info first stage partnership Asopricor & Algoma.*

the strengths of the Association that have evolved and been maintained over two generations. Such a partnership would also support Asopricor's core values of forging alliances with other social sectors – in this case the education sector in an international context; and assisting with the development of local social economies through the creation and sharing of knowledge of its own successful processes.

The research results are expected to assist Asopricor in further development of itself as a social enterprise. It is understood that Asopricor currently wishes to explore some research questions related to the following issues:

The relationship of Asopricor's processes (consciousness raising, organization, transformative action, evaluation and celebration) to the development of a second-generation of Asopricor members  
Future opportunities for growth and development based on the evolution of Asopricor's processes and the impact of such processes on the second generation of members

The results of this research will be of interest to other social economy enterprises as they deal with issues of succession and evolution, governance and membership education. Many social economy enterprises in Canada are faced with an aging and retiring membership; understanding the processes of developing a second or new generation of social economy actors will be key to the continued development and evolution of this sector of the economy.

Asopricor and CESD have already developed some initial linkages. Currently, one of the founding members of Asopricor, Jose Agustin Reyes, is enrolled in the CESD program at Algoma University College. Additionally, the faculty member responsible for the Linking, Learning, Leveraging project in Northern Ontario, Dr. Gayle Broad, is the senior researcher in the CESD program and has visited Asopricor Cooperatives, and is familiar with the work of the Association. This initial sharing of information has convinced CESD that the research which would result from such a partnership would add value to the Linking, Learning, Leveraging project.

### **Methodology:**

Over the next five years, Linking, Learning, Leveraging will CESD proposes to work closely with social economy organizations to support them in research of their choosing. This proposal suggests four key components to the research:

- 1) That Participatory Action Research (PAR) is the methodology employed by Asopricor in conducting the research;
- 2) That the research be facilitated by Jose Agustin Reyes, in coordination with the Directors of the Asopricor Association and the coordinator of the CESD Program Dr. Gayle Broad;
- 3) That the Asopricor research be linked to the Linking, Learning, Leveraging project through conference calls, email, and at least two meetings (in Canada) over the period of the research; and
- 4) That the results of the research be shared first, within and among the Asopricor membership, and then through the Linking, Learning, Leveraging project with an international audience.

PAR As the research methodology.

## Appendix 9 Document 5

*J. Reyes Info first stage partnership Asopricor & Algoma.*

CESD proposes the use of PAR as the research methodology for the following reasons:

PAR follows the same iterative process currently used by ASOPRICOR in its development processes: examine (or observe) – analyse (or plan) – act – evaluate (or reflect)

PAR is consistent with Asopricor's values of actively engaging in its own processes (conceptual, administrative and implementation), and the inclusion of marginalized viewpoints

PAR is a methodology well-suited to the study of complex phenomena. The study of cooperatives lends itself to a cross-disciplinary approach combining and drawing on the intersection of social and economic issues, thus resulting in many complexities of study

Association members will be partners, or community facilitators, in the exploration and study of the phenomenon, providing an opportunity for them to participate in knowledge creation

The "action" component of PAR provides an opportunity to combine activism with knowledge creation (learning by doing, doing by learning) though supporting the work of those engaged in social organizations and cooperatives, thus encouraging the continuation of their work

The research may provide an opportunity to use and perhaps even further develop a research methodology designed by and for community activists, feminists, and Indigenous peoples

### **Research Facilitation:**

The CESD proposes that the research be facilitated by Jose Agustin Reyes with a group of six community facilitators selected from the Asopricor membership. Reyes is currently enrolled in the CESD program and thus has easy access to the research support required for such an undertaking. His knowledge of the socio-political context within which the Asopricor Association functions as well as of the organization itself, developed through twenty years of membership in the Association, provides him with strong background knowledge of the organization and its processes. At the same time, his absence from the cooperative in recent years provides him with some distance which will assist in the analysis of the data collected.

CESD proposes that a group of six community facilitators drawn from the current membership act as community facilitators in the PAR methodology. Ideally, these individuals will be selected with a view to providing as much diversity within a small group as possible. Attention should be paid to age, gender, type of cooperative experience, and regional representation. Not every perspective will be represented nor expected; however, the community facilitators should be individuals who will willingly share the perspectives of others with whom they may disagree. This propensity will provide an opportunity to question conclusions that may be drawn.

The research data will be drawn through a series of meetings conducted via teleconference, and/or in-person meetings. This may be conducted over a period of months, or alternatively, for ease of meeting, over a 3-4 day period, following a period of consultation to identify the formal research questions. Funding will be provided to cover all out-of-pocket expenses of the community facilitators including any loss of wages.

The discussions, conclusions and reports of the community facilitators will constitute the main body of research data, though individual interviews with additional cooperative members may be necessary to elicit specific information. Once the data is collected, the research facilitator will analyse it in conjunction with the Directors of Asopricor and the coordinator of the CESD program, Dr. Broad, and a draft set of results will be prepared. These results will then be presented to the community facilitators to ensure accuracy in the analysis.

## **Appendix 9 Document 5**

*J. Reyes Info first stage partnership Asopricor & Algoma.*

For validity testing of the results, focus groups and interviews with key informants will be conducted, wherein alternative explanations will be explored. The research results will then be finalized with the community facilitators and the Asopricor membership.

### **Connecting with Linking, Learning, Leveraging:**

One of the key elements of the Linking, Learning, Leveraging project is the social capital that will result from connecting the various research projects together. Although Asopricor's research will be linked to the regional node through CESD, the Association will have access to, and be conjoined with all the research being conducted through the project. This will be achieved through regular conference calls, a project list serve, potentially a website, and at least two in-person meetings (in Canada) throughout the five-year project. There is also a strong likelihood that Canadians will visit Asopricor during this time, and the feasibility of other types of exchanges that will promote relationships between Asopricor and other research partners will be explored.

This will provide the Asopricor membership with a network of social economy partners across a large region in Canada, who will share their leanings on their activities and processes, the Canadian social economy context, and their research methodologies. Likewise Asopricor members will have an opportunity to share their knowledge with Canadians, an exercise which will result in additional reflection on differences in processes between the two countries and cultures.

### **Dissemination of Results:**

As the primary purpose of Linking, Learning, Leveraging research project is to promote the development of the social economy, dissemination of the research results is a key component of the project. It is expected that results of the research will be disseminated through academic journals and popular media; through conferences in Canada, Colombia and other international venues; and through the sharing with other participants in the Linking, Learning, Leveraging research project.

Since a major goal of the project is knowledge-sharing, the CESD program will require interim reports on at least an annual basis, or as required by the funder, and final reports, as well as reports on the research methodology and results. CESD recognizes that ethical requirements of community owned research requires that prior to the release of research results; a thorough review of the research by the community is required. Accordingly, CESD recognizes that the knowledge generated through this project is community-owned knowledge, and that the Asopricor Association has the final say on publication of any and all results. Acknowledgement of funders and intellectual guidance provided through the Linking, Learning, Leveraging project will be contained in all publications and presentations.

CESD is aware that methodologies such as Participatory Action Research (PAR) may lead a community group to surprising and unexpected results in the research. This is an acknowledged part of the process. CESD expects that Asopricor and the research facilitator will advise CESD as soon as possible in the case of such an event, so that the project can be appropriately adapted to the changing circumstances.

### **Resources for Community-Based Research:**

Although the resources for the projects are not exhaustive, once the partnership is established a budget will be prepared which will include the following elements:

## Appendix 9 Document 5

*J. Reyes Info first stage partnership Asopricor & Algoma.*

Training of research facilitators and community facilitators in the research methodology

Teleconference calls – so that community researchers can communicate with members of other research initiatives and learn from their experience

Materials required conducting the research (training manuals, tape recorders, laptops, etc)

Local meeting costs for community facilitators, and for focus groups to verify the research findings

Travel and related costs (both to participate in research itself and to present the research at international conference(s))

### Primary Contacts:

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## **WIRA - Guiding Principles** (Excerpted from WIRA website)

### **Partnerships**

All eligible proposals must list at least one academic partner and one community partner willing to jointly manage the research project. If needed, the WIRA liaison directors will work closely with interested individuals and groups to find appropriate partners to put forward an application. Once the partnership has been established, the research questions and objectives determined, and the commitment and roles of the partners agreed upon, the application for funding must be submitted by the deadline for adjudication by the WIRA Executive Steering Committee. An often-challenging part of developing a research partnership is defining the roles and levels of involvement of the academic and the community partners. The degree and manner of partner involvement can be as important as the research itself, and must be decided and agreed upon by the partners themselves. WIRA research partnerships can take many forms. The involvement of community partners in WIRA research projects to date ranges from a very involved advisory role, to fully engaged partners gaining research skills throughout the process, to a role of providing primary guidance to the research direction and process.

It is important that the partners commit to being involved in the research and to working collaboratively towards the goals of the research. The time required by each partner and the specific roles of each partner will likely evolve and vary at different stages of the research.

Some people may feel very uncomfortable with this loosely defined partnership and process. This type of community-based research is flexible in order to meet the particular needs and availability of those involved. Also, the very nature of the research topic often requires a particular style of research and involvement of the partners.

Flexibility allows for innovative research strategies and processes that meet community needs and result in findings that are meaningful to the community as well as academics. Community members gain increased confidence in their knowledge and build research skills, while academic partners connect theory with reality and gain skills in community-based research techniques. This type of research can be very challenging, as the process of interaction between partners demands as much attention as the research methods themselves.

Partnerships take a lot of work to maintain, and sometimes fail due to a breakdown in the commitment of the partners to the goals of the project. When partnerships succeed, however, the results are very rewarding.

## **Types of Research**

Linking, Learning Leveraging funds community based research about the social economy. Community-based research takes place in community settings and involves community members in the design and implementation of research projects. Such activities should demonstrate respect for the contributions of success which are made by community partners as well as respect for the principle of "doing no harm" to the communities involved.

In order to achieve these goals, the following principles should guide the development of research projects involving collaboration between researchers and community partners, whether the community partners are formally structured community-based organizations or informal groups of individual community members.

## **Principles**

In community-based research, community partners should be involved at the earliest stages of the project, helping to define research objectives and having input into how the project will be organized. Community partners should have real influence on project direction--that is, enough leverage to ensure that the original goals, mission, and methods of the project are adhered to.

Research processes and outcomes should benefit the community. Community members should be hired and trained whenever possible and appropriate, and the research should help build and enhance community assets.

Community members should be part of the analysis and interpretation of data and should have input into how the results are distributed. This does not imply censorship of data or of publication, but rather the opportunity to make clear the community's views about the interpretation prior to final publication.

Productive partnerships between researchers and community members should be encouraged to last beyond the life of the project. This will make it more likely that research findings will be incorporated into ongoing

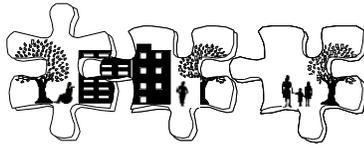
community programs and therefore provide the greatest possible benefit to the community from research.

Community members should be empowered to initiate their own research projects which address needs they identify themselves.

Source: [University of Washington School of Public Health](#)

- Retrieved from WIRA – Social Economy Initiative webpage at [http://ius.uwinnipeg.ca/WIRA/wira\\_social%20economy.htm](http://ius.uwinnipeg.ca/WIRA/wira_social%20economy.htm)

## **LINKING, LEARNING, LEVERAGING: SOCIAL ENTERPRISES, KNOWLEDGEABLE ECONOMIES AND SUSTAINABLE COMMUNITIES**



### **PROGRAM OVERVIEW: MANITOBA AREA**

#### **WHAT IT'S ALL ABOUT**

“Linking Learning Leveraging” is a five-year research initiative headed by Dr. Lou Hammond Ketilson at the Centre for the Study of Cooperatives, University of Saskatchewan, in partnership with other Canadian universities and community and cooperative organizations. The initiative is funded by the Social Sciences and Humanities Research Council and covers the geographic area of Saskatchewan, Manitoba and Northern Ontario. Support and administration for the Manitoba region of the initiative is being provided by The Winnipeg Inner City Research Alliance (WIRA).

“Linking, Learning, Leveraging” will essentially investigate how the social economy helps build more respectful relationships within communities, with the environment, and among stakeholders.

General research questions the initiative is exploring include:

- What can be learned from the social economy’s evolution to date?
- Where is the social economy?
- What is it accomplishing?
- What does it need?
- How can we apply this knowledge in public policy?

The social economy refers to those enterprises and organizations that use the tools and some of the methods of business, on a not-for-profit basis, to provide social, cultural, economic and health services to communities. Social-economy enterprises, such as community-based organizations, co-operatives, community economic development organizations, not-for-profits, and other voluntary-sector initiatives, direct organizational and community resources to the simultaneous pursuit of social and economic ends. These enterprises are flexible and sustainable tools that allow communities to address objectives related to sustainable livelihoods, place-based redevelopment, capacities, and social supports. The integration of social and economic objectives promotes responses that sustain individuals and communities; significant opportunities for wealth generation can be developed while furthering goals of participation and control.

For more information on the broader initiative, visit

<http://www.usaskstudies.coop/socialeconomy>

## AREAS OF RESEARCH FOCUS

The overall initiative focuses on five areas of research (called Clusters):

1. **Social enterprise/organization development** – primarily case-study profiles of social economy enterprises/organizations examining; organizational structure, purpose, processes and planning; membership and membership engagement; relationships within the social enterprise and with government, for profit enterprises and other social economy organizations/enterprises; roles of social enterprises/organizations in promoting more forms of social integration; and, the cultural and social values that inform practices within the enterprise/organization.
2. **Financing strategies for social enterprise/organization development** – will focus on the challenges of funding the social economy, in addition to identifying innovative and successful funding models. Because social-economy enterprises direct their activities toward dual goals – social and economic – finding appropriate funding sources can be problematic. Access to core funding as opposed to start-up or project-based is an ongoing issue. Many of the organizations go from grant deadline to grant deadline in search of sustainable funding. This project-based funding is ineffective and distortionary, especially for organizations delivering social services to highly underprivileged clients.
3. **Governance of social-economy enterprises/organizations** – this area will highlight examples of innovative, alternative, or experimental approaches to stakeholder involvement inspired by democratic values and principles. Such approaches could take quite different forms from conventional democratic practice such as attendance and voting at meetings. May offer methods of measuring good governance and its impacts, development of tools for assessment of democratic and governance practices, etc.
4. **Measuring and mapping the social economy** – the key interest in this area is in mapping the nature and measuring the impact of social economy enterprises/organizations on both the economic vitality and the quality of life in the communities or regions where they operate. Another is determining the underlying conditions that strengthen social-economy organizations/enterprises.
5. **Developing policy frameworks for the social economy** - this area offers the opportunity to review existing regulatory frameworks affecting the social economy with a view towards identifying gaps as well as areas of overlap and multiple governmental interest.

## CURRENT LLL RESEARCH PROJECTS FUNDED THROUGH WIRA

- Community Research Hub: a case study in social economy
- Building a Policy Framework for CED and the Social Economy
- Sustainable Financing for the Social Economy

For more information on these projects, visit the WIRA website at <http://ius.uwinnipeg.ca> or [http://ius.uwinnipeg.ca/wira\\_overview.html](http://ius.uwinnipeg.ca/wira_overview.html)

## RESEARCH QUESTION OPTIONS FOR MANITOBA

Below are examples of specific research questions that have been identified to be of particular interest within the Manitoba context. Applicants are encouraged to address one or more of these questions in their research proposal. (Note: Applications addressing research questions not included below will be given equal consideration provided they address relevant themes and issues within the social economy)

- How can existing and potential taxation instruments be used to reward and increase involvement in the social economy?
- What types of regulations can address the liability insurance crises permeating social economy organizations?
- What is the role of the Social Economy in Community Revitalization?
- What is the role of educational institutions in the Social Economy?
- What is the nature and role of Social Economy in rural development in Manitoba?
- What is the role of the social economy in developing welcoming communities for newly arrived immigrants and refugees?
- How can we work with communities to unlock and measure local knowledge and impact?
- What are the indicators of Social Economy success and how can they be translated into concrete economic benefits?
- How do we develop effective linkages, partnerships, and collaborations for capacity building? (education, labour market, etc)
- What types of organizational models and leaderships have worked/not worked for Aboriginal communities in the Social Economy?
- What kind of change is necessary for Social Economy organizations to present a united front to government?
- How can government and the private sector be encouraged to factor in the social, health and environmental costs and returns in adjudicating applicants for RFPs? (rather than simply awarding to the lowest bidder?)
- Most of the for-profit world measures progress in terms of financial quarters. What time frame is appropriate for measuring progress within the Social Economy?
- How many and what kinds of jobs is the Social Economy creating? How do the pay and benefits of those jobs compare to the for-profit and government sectors? Are these jobs stable?
- How do existing employment regulations impact the social economy's flexibility in accommodating to their employees' specific needs?
- How can we capture and report on social economy benefits at a project and sectoral level using common, shared measurements and language?

## WHO'S ELIGIBLE TO APPLY

- Organizations, enterprises and academics active and interested in the social economy in Manitoba are eligible to apply.
- Each application must come from a partnership between at least one academic and one community organization/enterprise representative.

## **HOW IT WORKS: THE PROCESS**

All eligible proposals must list at least one academic partner and one community partner willing to jointly manage the research project. If needed, the WIRA liaison directors will work closely with interested individuals and groups to find appropriate partners to put forward an application. Once the partnership has been established, the research questions and objectives determined, and the commitment and roles of the partners agreed upon, the application for funding may be submitted by the deadline for adjudication by the WIRA Executive Steering Committee.

### **Responsibilities of project partners:**

- Establish the roles and levels of involvement of the academic and community partners, according to the nature of the research, and the needs, expertise and time availability of partners.
- Strive for balance in power and participation among partners.
- Undertake community-based research.
- Partners fully collaborate in all steps of the research, from identification of research goals, to developing methodology, to producing the final report.
- Meet regularly regarding the progress toward the goals and objectives of the project.
- Provide research leadership to the student and/or community researcher.
- Accurate reporting of research results, taking into account the needs for confidentiality in gathering, dissemination and storage of information and the need for objectivity and neutrality in research.
- The partners shall provide the resources and infrastructure (eg. Staff, space, appropriate supervision, stationery supplies, etc.) needed to complete the project.
- The Principal Investigator is the partner that is the main contact person who organizes and directs the research project, arranges meetings, and stays in regular contact with the Community Liaison Director.

### **Role of the WIRA Liaison Directors:**

- Assist interested individuals in developing research ideas and in the strengthening and defining of research goals prior to the submission of an application
- Ensure that strong research partnerships are established: connect individuals to others with whom they may want to form a research partnership and submit an application.
- Hold and administer all of the funds committed to the “Linking, Learning, Leveraging” Program.
- Pay the community release amount directly to the community organization and pay the internship stipend to the student upon receipt of invoices (including hours worked, and wages plus mandatory deductions).
- Facilitate collaboration between partners throughout the research project.
- Check in regularly with research partners to ensure that the process is running smoothly.
- Offer research and administrative support to the research partnerships.
- Inform research partnership about progress of the larger “Linking, Learning, Leveraging” initiative.

- Notify partners of relevant conferences, workshops, and events and provide assistance in applying for funds for travel and attendance.

**RESEARCH FUNDING AVAILABLE** (Note: It is not necessary to have the student researcher or community researcher identified at the time of application)

- **For students:** Must have full-time student status. Preference will be given to students demonstrating excellence in academic performance, and those whose research interests lie in the social economy. Project application may include a request for either:
  - a full-time four month internship for up to \$5,000 (same for all levels of study), or
  - a 12 month internship (to cover 8 months of part-time work during the school year plus 4 months of full-time summer work). The maximum amounts for 12 month internships are: undergraduate - \$10,000; Master's student - \$12,000
- **For community release time:** must be an employee of an organization/ enterprise involved in the social economy. Payment will go directly to the community organization to compensate for the employee's time spent on the research. Maximum of \$5,000 per person, per project.

## FOR MORE INFORMATION

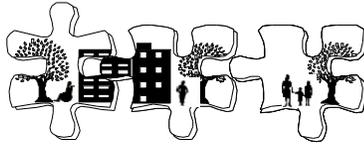
If you have questions about the "Linking, Learning, Leveraging" initiative in Manitoba, or need assistance in finding appropriate project partners, please contact:

Anita Friesen  
 Community Liaison Director  
 Winnipeg Inner City Research Alliance  
 #103-520 Portage Avenue  
 Winnipeg, Manitoba R3C 0G2  
 Email: [a.friesen@uwinnipeg.ca](mailto:a.friesen@uwinnipeg.ca)  
 Phone: (204) 982-1152

Tom Carter  
 Research Liaison Director  
 Winnipeg Inner City Research Alliance  
 #103-520 Portage Avenue  
 Winnipeg, Manitoba R3C 0G2  
 Email: [t.carter@uwinnipeg.ca](mailto:t.carter@uwinnipeg.ca)  
 Phone: (204) 982-1148

## Appendix 9 Document 8

# GUIDELINES FOR RESEARCH APPLICANTS



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

January 2007

### 1. GENERAL PRINCIPLES AND CONDITIONS

- 1.1. Eligibility: Organizations, enterprises and academics active in the Social Economy in Manitoba.
- 1.2. Receipt of application and consideration of application do not constitute acceptance of proposal.
- 1.3. Consideration will be given to all applicants who have the broad support of the Executive Steering Committee as well as the Liaison Directors. Funds will be granted on the basis of the merit of individual applications, policy relevance, and potential contribution to the goals of the “Linking, Learning, Leveraging” Initiative. At its own discretion, the Executive Steering Committee (ESC) may require further review of grant applications.
- 1.4. All proposals received will be treated as confidential and due diligence will be exercised to maintain the applicants’ confidentiality.
- 1.5. Applications will be evaluated according to the following criteria:
  - 1.5.1. Degree to which the application is consistent with the research and policy relevance priorities of the “Linking, Learning, Leveraging” initiative.
  - 1.5.2. Evidence of effective partnership and collaboration among researchers and community groups.
  - 1.5.3. Quality and appropriateness of the methodology and research plan.
  - 1.5.4. Sufficient capacity and expertise to carry out the necessary research.
  - 1.5.5. Potential of research initiative to influence policy and program practices.
  - 1.5.6. Appropriateness of the requests for student internships and community salary replacement.

### 2. PROPOSALS

- 2.1. Proposals must be clearly written and provide all information requested on the application form.
- 2.2. Maximum project duration is one year.
- 2.3. Each application may request a maximum of one student internship and one community salary replacement.
- 2.4. Because the significance of the proposed work is being evaluated, applicants must indicate how the project is relevant to the community and demonstrate a sound research methodology.
- 2.5. Each application must be put forward by a partnership of at least one academic and one community representative of a social economy organization/enterprise.
- 2.6. The Principal Investigator may be an academic or a community representative of a social economy enterprise/organization.
- 2.7. Investigators must abide by the policies and regulations operative in their home university and enterprise/organization.
- 2.8. It is the responsibility of the successful applicants to secure ethics approval and permission from enterprises/organizations involved prior to undertaking the research. If the proposed research involves human subjects (interviews, surveys, participatory observation, etc), ethics approval is necessary.

### **3 AWARDS**

- 3.1 Grant applications will be reviewed by the ESC or a designated Adjudication Committee. The decision of the committee on grant applications is final.
- 3.2 Committee decisions will be communicated in writing through a “Notice of Award” to successful applicants in 2 to 4 weeks of the closing date for submissions.
- 3.3 At the discretion of the ESC, the amount of award may or may not be the same as the amount requested in the proposal.
- 3.4 Grant funds may be used only for the project and purposes described in the application, subject to any special conditions given by the ESC in the Notice of Award.
- 3.5 Normally grant funding will be provided for the period of time indicated in the applicant’s request. The term may be extended for an additional period upon written request to the ESC Chair.
- 3.6 Any expenses incurred by the project partnership above the total grant will be the responsibility of the project partnership.

- 3.7 An award may be terminated with or without notice if conditions are not observed. Unspent funds must be returned to the “Linking, Learning, Leveraging” budget if the award is terminated. Notice of termination of an award will be sent by registered mail to the Principal Investigator, who will be responsible for informing the Co-Investigators and all other groups or individuals involved in the project.

## 4 REPORTS

- 4.1 The partnership shall be in contact with the Community Liaison Director on a regular basis throughout the project to discuss research progress and any difficulties or challenges that may arise.
- 4.2 A mid-point progress report is required for all projects, and should include a description of the research activities to date, initial findings, and comments on the research partnership process (2-3 pages in length).
- 4.3 A final report must be submitted within three months of the end of the term of award.
- 4.4 The final report will contain a one-page executive summary in plain language.
- 4.5 The project partnership shall submit for review all materials produced under the funding agreement prior to release to any other recipient.
- 4.6 The project partnership shall submit three hard copies of the final report (one for the Centre for the Study of Cooperatives’ library, one for the project file, one for display and in-office use) and an electronic copy to be posted on the WIRA website and for use by the “Linking, Learning, Leveraging” initiative.
- 4.7 The project partners/researchers will grant to the “Linking, Learning, Leveraging” initiative a non-exclusive, irrevocable, worldwide, fully-paid and royalty-free license to make, copy, translate, use, produce or further develop all materials for any purpose, except sale or licensing in commercial competition with the researcher.
- 4.8 The following must appear within the introductory pages preceding the body of the final research documents:
- This research was financially supported by the “Linking, Learning, Leveraging” initiative which is funded by the *Social Sciences and Humanities Research Council* (SSHRC). The Winnipeg Inner City Research Alliance (WIRA) provides research guidance and administrative support for Linking, Learning Leveraging. The opinions of the authors found herein do not necessarily reflect those of SSHRC, WIRA, or Linking, Learning, Leveraging.
- 4.9 The “Linking, Learning, Leveraging” name, the WIRA name and logo, plus the SSHRC logos must be prominently displayed on the front page of the final report and on any dissemination materials following from the research project.
- 4.10 The ESC reserves the right to evaluate the research report and request reasonable changes by the researchers prior to dissemination.

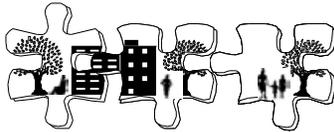
4.11 Following approval by the ESC of the final research report, project partners are strongly encouraged to disseminate their findings as widely as possible.

4.12 Subsequent applications will only be considered if the required final or progress reports have been submitted by the established deadlines.

Appendix 9 Document 9

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

**RESEARCH GRANT APPLICATION**



**WINNIPEG INNER-CITY RESEARCH ALLIANCE**

Anita Friesen  
#103-520 Portage Avenue  
Winnipeg, Manitoba  
R3C 0G2

COPIES REQUIRED  
*1 Original Hard Copy*  
*1 Electronic Copy*

**DEADLINE: 4:30 P.M. MONDAY, MARCH 26, 2007**

NOTES:

1. Committee decisions will be communicated in writing two to four weeks after the closing date for the submissions.
2. Acknowledgement of the receipt of an application is given within two weeks of the above deadline. If you have not received notification by this time, please contact Anita Friesen at [a.friesen@uwinnipeg.ca](mailto:a.friesen@uwinnipeg.ca) (204)982-1152.
3. The applicant's signature signifies willingness to comply with the terms and conditions of SSHRC and *Linking, Learning, Leveraging* guidelines as described in the document *Guidelines for Research Applicants*.

## PART I: OVERVIEW

**Project Title:**

**Name of Principal Investigator:**

**Name(s) of Co-Investigator(s):**

***Main Research Domain(s):***

Social Enterprise Development

Financing Strategies for Social Enterprise Development

Governance of Social-Economy Organizations

Measuring and Mapping the Social Economy

Policy Frameworks for the Social Economy

Other

**ABSTRACT** (250 word maximum)

The following elements must be addressed in the abstract:

a. research subject

b. objective(s) of the research

c. methodology

d. anticipated findings

e. policy and/or community development implications

**PART II: RESEARCH GRANT APPLICATION**

1. **Project Title:**
2. **Starting Date:**
3. **Completion Date:**  
(\*\*Note: Maximum project duration is one year)
4. **Name of Principal Investigator (P.I.):** \_\_\_\_\_  
(Note: May be academic or Community partner)

***If P.I. is Academic:***

Department:  
Institution:  
Telephone:                      Fax:                      E-mail:  
Mailing Address:

Please indicate position:

- |                                              |                                                |
|----------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Professor           | <input type="checkbox"/> Assistant Professor   |
| <input type="checkbox"/> Professor Emeritus  | <input type="checkbox"/> Instructor            |
| <input type="checkbox"/> Associate Professor | <input type="checkbox"/> Other (specify) _____ |

Appointment Type:

- Full-time     Part-time     Continuing     Specific Term

***If P.I. is Community Partner:***

Organization/Affiliation:  
Position:  
Telephone:                      Fax:                      E-mail:  
Mailing Address:

**5. Research Partners/ Co-Investigators:**

Please indicate the name, position/affiliation/department/institution, phone number, email, fax number and mailing address of each Co-Investigator below:

**6. Experience and/or prior research.**

Using only the space provided (maximum of 2 pages), please briefly list the research activities and community development accomplishments of the principal investigator(s) and co-investigator(s) over the past few years, emphasizing work in the area of the present proposal. List notable community initiatives and activities, publications, reports etc.

7. If the proposed research involves human subjects, has approval been obtained from the University Ethics Committee?

n/a     Yes     Not yet, but it will be secured prior to undertaking research

**If yes**, please attach ethics certification or forward it to Anita Friesen at a later date. **No funds will be paid** to the successful project in the absence of such certification.

8. If the nature of the proposed research necessitates that permission be granted from another organization, agency or department, has that permission been secured in writing?

n/a     Yes     Not yet, but it will be secured prior to undertaking research

**If yes**, please attach a copy of the letter of permission, or forward it to Anita Friesen at a later date.

9. **Project description.** (Maximum of 2 ½ single-spaced pages).

Applicants must provide the following information:

- a) statement of the problem or topic to be researched (What is the research about?);
- b) objectives/purpose of the project (What is this research hoping to discover?);
- c) rationale (Why is this research important?);
- d) procedures/methodology including a description of the research instruments such as surveys or interviews (How will the research be undertaken?);

**Project Title:**

**Description:**

10. In the space below, please indicate the relevance of the proposed study to the broader social economy including comments on policy implications, capacity-building, and community development potential.

### **PART III: STUDENT / COMMUNITY TIME REQUIREMENTS**

#### **a) Student Internship Request:**

Please indicate internship request :

- four month full time - \$5,000
- 12 month (8 month part time plus 4 month full time)
  - Undergraduate student, \$10,000
  - Master's student, \$12,000

Will the data collected be used as part of the *graduate student's* thesis research?  Yes  No

Amount to be paid to student per hour: \$ \_\_\_\_\_/hr. + \$ \_\_\_\_\_ (10% benefits) = \$ \_\_\_\_\_

11. Provide a clear justification for the type of student internship request, including work to be performed and approximate time required.

#### **b) Request for Salary Replacement for Community Partner**

Amount requested \$ \_\_\_\_\_  
(maximum \$5,000)

12. Provide a clear justification for the community salary replacement request, including work to be performed and approximate time required.

**Signatures Required:**

NOTE: The applicants' signatures signify willingness to comply with the terms and conditions of the guidelines set forth in the document *Guidelines for Research Applicants*.

**Principal Investigator**

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

**Co-Investigator(s)**

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

**Department Chair**

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

**Research Grant Officer**

\_\_\_\_\_  
*signature*

\_\_\_\_\_  
*date*

The above signature(s) signify that the respective individuals are aware of the application, approve of the use of the department or organization's facilities, services or other resources as may be necessary for the work, and that the applicant has (or will be allowed) the necessary research time within his/her normal work schedule.

## **DISSEMINATION STRATEGY For WIRA research reports**

A very important component of the Winnipeg Inner city Research Alliance (WIRA) initiative is dissemination. This is the final step in your research project, generally following the completion of the final research report.

### **RATIONALE FOR DISSEMINATION: Why get the word out there?**

- Put research into action: research findings can act as a catalyst for positive, effective, and appropriate change
- Empowerment of community: knowledge is power!
- Expand the general body of knowledge
- Provide a foundation for other research to build upon
- Influence policy makers and decision makers
- Avoid research duplication

When the research report is complete, reviewed by the Research Liaison Director and Community Liaison Director, edited, and has the appropriate logos and disclaimers attached, the research team will need to plan a dissemination strategy. The Community Liaison Director will meet with the research team to assist in the planning and implementation. Prior to meeting, it is important to consider the following points to ensure that the dissemination is appropriate and effective.

### **LOCAL DISSEMINATION What method and format are best suited to the research findings and researchers?**

Consider the following:

- a) potential target audiences: *Who will be most interested in this research? Who would be best able to put the findings to good use?*
  - Local relevant community organizations
  - Local community residents
  - Local academics and students
  - Research institutions
  - Government officials from appropriate departments
  - Politicians: city, province, federal
  - General public
  - Practitioners
- b) level of potential interest by policy makers, bureaucrats, and politicians
- c) degree of potential public interest in the issue
- d) timeliness of the release in relation to related events
- e) potential response of press – negative, positive or no interest
- f) intent of the research: community awareness raising vs. policy change
- g) Level of support and comfort of all project partners

- h) Budget
- i) Impact on the community
- j) Political sensitivities

Once points a) to j) above have been taken into consideration, the potential methods of dissemination can be discussed and the most appropriate option(s) chosen.

#### **Dissemination Options:**

- a) Send out message to all local e-mail networks to announce release of report
- b) Press conference: see below for planning details
- c) Release findings to practitioners only, no press conference
- d) Community workshop to raise awareness, share findings, and strategize
- e) Brown-bag presentation
- f) Write articles for local community newsletters
- g) Post complete final report plus executive summary on WIRA website
- h) A number of 'one-pagers' of specific sub-topics; targeted at specific groups/interests; plain language
- i) A community workbook: modules with corresponding toolkits that contain research findings, tested intervention and research protocols, training materials, needs assessment, and evaluation tools.
- j) Policy paper targeted at policy makers
- k) 'Best practices' write-up
- l) Send hard copies to all appropriate local resource libraries
- m) Make hard copies of report available through IUS
- n) Have hard copies of report sent to each of the research partners

#### **Broader dissemination**

- a) presentation at conferences: local, national, and international
- b) publication in academic journals
- c) Canadian Centre for Policy Alternatives
- d) Articles in newsletters with national dissemination
- e) Send copies to community based organizations in other cities across Canada, if findings are transferable
- f) Send notice of release of report to all relevant national and international contacts, including funders, community organizations, other CURAs, politicians and government bureaucrats. (This will be taken care of by Anita)

**\*\*\*Note:** Whatever methods of dissemination are chosen, it will be important to acknowledge WIRA's funders (CMHC and SSHRC) on the materials.

## **WIRA PRESS CONFERENCES** (if applicable)

A press conference is not always the best way to disseminate information about research. A press conference is appropriate if:

- a) you'd like to inform the general public;
- b) it would likely *not* lead to bad press; and
- c) you feel that the topic is newsworthy (interesting enough to the general public to warrant reporting). You must not only be able to communicate your story properly, you must also be able to create an interesting story that is worth telling -- and may be worth retelling. If you are able to generate ongoing debate about your topic, all the better. Controversy is sometimes your best publicity.

### **Visual interest**

One of the most overlooked and yet important elements in creating an interesting media event is visuals. "Talking heads" press conferences can be boring and commonplace. Find a way to make visible what it is you are trying to communicate. When planning a press event always keep in mind the "photo op" What photo do you want to appear in the paper or on the evening news? Make sure the picture says something. A picture really can be worth a thousand words. You may even want to provide a photo with a caption.

The best visual is the one that requires the fewest words to explain. Create a symbol that will represent what you are trying to communicate. While "talking heads" can be boring, graphs and charts are only slightly better.

The best of all media events has plenty of action and creativity. Find the ironies in situations. Inject humor when it is appropriate. Deliver your message with vigor and enthusiasm. Keep it simple and straightforward.

### **Identify your one main message to the public.**

What is the one idea that you want the public to take away from the press conference?

**Venue:** Whenever possible, hold your event somewhere that will reflect your message. Create an effective backdrop. If you are addressing the lack of affordable housing, then go to empty public housing. If you are speaking about militarism, go to a military base. Try to find a place where members of the press don't usually go, but be sure it isn't so far afield that they can't find it (or don't want to).

- Choose appropriate venue: size is crucial (not too big and echoy, nor too small and cramped). Need good lighting.
- Place to hang coats, leave personal things.
- Space for media to set up their equipment. Media needs room to move around: they need to be able to arrive late and leave early without disrupting. A 'media feed' means they don't have to put microphone right at the presenter, but can just plug into it from a distance instead.
- Control noise issues.
- Consider setting: backdrop, podium, sign in front

- Seat speakers at front, all close together.
- Seat audience close to the speakers so they are in the picture.

**When?** Timing for a media event is critical to maximizing its potential. As a general rule, the best times for an event are Monday through Thursday from 10 a.m. until 12 noon. Morning hours will guarantee that deadlines are met, and may allow for further development of the story. Some newspapers do not publish on weekends, which means Friday events may not be covered until Monday. Stories covered on the evening news quite often have a bonus in weekday morning coverage as well. News offices are usually short staffed on weekends, and simply do not have the personnel available at that time to cover your story. In addition, reporters who are regularly assigned to cover particular issues are often off on weekends. Finally, weekends have fewer news viewers. Try to find out if there are any other press events happening that you don't want to compete with for media attention, and work around those.

**Who should present?** Ensure that the person who is speaking on behalf of your research project is comfortable with the media, presents ideas clearly and concisely, exhibits passion and enthusiasm for the research topic, and has the knowledge of the project to respond appropriately to questions.

Media often like to interview the person with the human-interest story -- the victim of the policy you are addressing, the local resident who has benefited from the project/program, etc. Spend some time helping the presenters prepare for the press conference.

Content: explain the relevance of research to current events, to common public concerns or issues of interest. Is it new? Is it an emergency? Or is it an important new issue? Outline your demands: include information about what people can do to help, and the date, time, and place of action. Speakers no longer than 10 minutes. Simple, powerful, and quotable (think about what would make a good 'news bite').

**What you might want to include in a Media kit:** A media kit expands upon the press release and provides more detailed information. It is still clear and concise. Key statements and insights are crucial. Bullet point lists are useful. Information provided should be meaningful to the media and the public. Potential media kit contents:

- copy of the press release
- executive summary/overview of the research report
- a number of short anecdotes or quotes
- recommendations - in point form
- short bios of presenters and researchers, and their contact info.
- background of research partner organizations and funders, plus logos
- how people can get copies of the report or further information on the topic

## **Planning the Press Conference: Roles, Responsibilities, and Timelines**

### **Anita (WIRA)**

- ❑ Compile an email list of key contacts: stakeholders, including policymakers, politicians
- ❑ Send advance notice of press conference to email networks (at least two weeks in advance)
- ❑ Book audio equipment, Sound system, including media feed, podium (2 weeks in advance)
- ❑ Collect information for Media Kit (All info due in to Anita by one week in advance of press conference)
- ❑ Write a condensed information handout for those who do not want a full press kit (5 days beforehand)
- ❑ Compile Media kits (two days ahead)
- ❑ Develop an order of events for the day, including timing
- ❑ Put notice of report on website and link to report (day before)
- ❑ Make sign-in sheets (day before)
- ❑ Double check with research team that all arrangements are made (day before)
- ❑ Act as the main contact person for the planning of the Press Conference
- ❑ Remind speakers beforehand of order in which they will speak, and allotted time
- ❑ Act as moderator to introduce speakers and facilitate question time. Moderator should end the press conference before it drags out too long. Step in and conclude the proceeding. Thank everyone for coming, offer additional information they can get and where they can find it.
- ❑ Following the press conference, send a write-up to email contacts with press release, link to reports, info on where to get hard copies, etc.
- ❑ Compile list of press coverage (ongoing)

### **Katherine Unruh (University of Winnipeg Communications)**

- ❑ Interview Researchers/collect information about the research report to be released (at least two weeks in advance)
- ❑ Write an advance notice about the press conference and send to Anita and research team for editing, then to press contacts (two weeks ahead)
- ❑ Write up a press release and send to Anita for editing (one week ahead)
- ❑ Post press releases on e-boards (staff and faculty)
- ❑ Put a 'newsflash' on the U of W website
- ❑ Send press release and info to the press people who didn't attend (after press conference, same day)

### **Research team**

- ❑ Meet face-to-face with Anita for initial planning meeting (three weeks in advance) Decide on date, venue, speakers.
- ❑ Book venue
- ❑ Contact speakers and confirm their attendance (2 weeks in advance)

- Have interview with Katherine Unruh (two weeks in advance at the latest)
- Send email addresses of contacts to Anita (at least two weeks in advance)
- Collect bios of each presenter and send to Anita (by one week in advance)
- Write an overview of the research (to Anita by one week in advance)
- Write acknowledgement to researchers and other contributors, send to Anita (one week ahead)
- If you are holding workshops, decide on details (purpose, target audience, where, when, open invitation, or by invitation only?). Write an appropriate invitation. Send to Anita to include in Media kits (one week ahead)
- Send mission statements/overview of community partners to Anita (one week ahead)
- Order food, drinks, plates, etc. for Press Conference (no later than one week in advance)
- Arrange for people to help in set-up of venue, food table, sign-in and information table (people to sit at table and welcome guests), presenters' table, podium, signage, chairs, sound system, signs directing people to the room (by one week ahead)
- All presenters meet to discuss each person's part. Statements to be brief and clear and no longer than 5 minutes. Limit the number of presenters. Prepare presenters with 30-second answers for radio and T.V. and quotable simple messages for print reporters.
- Practice answering potential questions from media/audience (a few days in advance).
- Presenters/speakers must be easily reachable by phone the day before, the day of, and the day after the press conference.
- Do actual set-up of room, etc. and test sound equipment by 1 hour before actual press conference.
- Set-up a sign-in table for press and public.
- Name tags for key individuals
- Start on time!
- Speakers should have a prepared statement so the main points can be made clearly, but it sounds better if it doesn't sound like it's being read.
- Only the designated spokesperson(s) should speak to the media before, during, and after the press conference.
- Have your spokesperson(s) ready to speak to media personnel after the press conference. Media personnel will often want personal interviews on camera or on tape after the main presentation, so do not rush off: take advantage of the opportunities while they are there.
- Presenters/speakers/researchers should leave the rest of the press conference day open for potential press interviews. Must be easily contacted by phone.

### **Tips for press interviews**

- Do not let yourself feel intimidated about talking to the media. Your message is important. You and your research are the reason the media are there.

- Get YOUR message to the public, not the media's message
- Use simple, powerful, quotable lines when speaking.
- Don't say anything you can't back up with facts.
- Preface with "in my opinion..." or "we believe..." if it is opinion.
- Don't bring up anything you are not prepared to discuss.
- If you are asked questions that you don't want to talk about, say "That's an interesting question, but our research is really about...", "We're not ready to discuss that matter at this time" or "Our group has not taken a position on that"
- Be high energy and enthusiastic
- Interviews are not conversations! The reporter is representing the public and will probably ask hard or sometimes deliberately leading questions. Remember that you are speaking to the public, not the reporter. The reporter is a vehicle for your thoughts. If you don't want certain phrases in the interview don't use them. Be very clear on your choice of words.
- It is okay to steer the interview in any fashion you choose. It's legitimate.
- Reporters are not experts. They are generalists. Don't assume they will know anything about your issue.
- With reporters, there is no such thing as 'off the record'.
- Tell the truth. If you don't, your credibility will be ruined. If you cannot divulge information, say so, and state why (if possible).
- In radio and T.V. interviews, don't be afraid of silences or pauses. Take your time to answer. Once you have made your point, stop. Give brief answers to questions.
- Mention WIRA and its funders – *Social Sciences and Humanities Research Council* and *Canada Mortgage and Housing Corporation*, the University of Winnipeg, etc.

## Appendix 9 Document 11

### Sample Subtransfer Agreement (with WIRA)

March 20, 2006

DR. ALAA ABD-EL-AZIZ  
ACTING VICE PRESIDENT OF RESEARCH, INTERNATIONAL AND EXTERNAL AFFAIRS  
UNIVERSITY OF WINNIPEG  
515 PORTAGE AVE RM 4CM05  
WINNIPEG MB R3B 2E9

Dear Dr. Abd-El-Aziz:

RE: SSHRC Project #859-2005-0007  
"The Social Economy Suite - Regional Node Grant "Linking, Learning and Leveraging: Social Enterprises, Knowledgeable Economies and Sustainable Communities"" (Our file #G7459)

Applicant: Dr. Lou Hammond Ketilson, University of Saskatchewan

Co-Investigator: Dr. Tom Carter, University of Winnipeg

Dr. Hammond Ketilson is collaborating with Dr. Tom Carter of your Institution on the above research project which is funded by SSHRC, Grant #859-2005-0007. Dr. Lou Hammond Ketilson has requested that \$53,650 be forwarded to your Institution for the first year of a five year agreement, specifically the period March 20, 2006 to March 31, 2007.

***The University of Saskatchewan will make accountable advances to The University of Winnipeg under this contract for compliance, providing The University of Winnipeg agrees to the following responsibilities:***

- ❖ The University of Winnipeg will ensure accountability for the transferred funds – in particular that the appropriate policies, systems, procedures and controls for the proper management of these transferred funds set out or referred to in the Tri-Council Memorandum Of Understanding (MOU) are in place;
- ❖ The funds are to be administered under SSHRC guidelines and must adhere to the relevant SSHRC policies as published in their formal guides, program literature and the MOU;
- ❖ The University of Winnipeg will administer the funds on behalf of SSHRC and the University of Saskatchewan for the benefit of Dr. Tom Carter, or any co-investigator or collaborator or research personnel at The University of Winnipeg as designated by Dr. Tom Carter in accordance with the relevant SSHRC policies as published in their formal guides and program literature and in the MOU;
- ❖ All expenses incurred must be allowable under SSHRC guidelines.

- ❖ The University of Winnipeg will ensure that Dr. Tom Carter uses the funds only in the areas permitted within the terms of this subtransfer agreement contract of compliance;
- ❖ The University of Winnipeg will repay to the University of Saskatchewan any funds which do not fully conform to SSHRC regulations, policies and requirements;
- ❖ The University of Winnipeg will ensure that Dr. Tom Carter completes a delegation of signing authority form for the transferred funds to any co-investigator, collaborator or research personnel at the University of Winnipeg. Delegation of signing authority allows Dr. Tom Carter to delegate another individual to authorize expenditures against her research project fund. In doing so, the person who has been granted signing authority on the funds, acknowledges the SSHRC regulations and terms of this agreement and indicated that they have been advised of the terms of reference on the general policies and procedures of SSHRC and the University of Saskatchewan in this respect;
- ❖ The University of Winnipeg has in place, or has access to, human and animal ethics review policies that conform with the *Tri-Council Policy: Ethical Conduct of Research Involving Humans* and with the guidelines of the Canadian Council on Animal Care;
- ❖ The University of Winnipeg will ensure that, if applicable, any certification requirements (human ethics, animal care, or biosafety) and annual renewals of such ethics approval will be in place before the transferred funds are made available and can be accessed by Dr. Tom Carter;
- ❖ If Dr. Tom Carter should have funds remaining at the end of the project year (March 31, 2007), the University of Saskatchewan may ask for the return of the funds. The University of Winnipeg will return all unused or uncommitted funds at the end of the overall project (August 31, 2010) to the University of Saskatchewan;
- ❖ The University of Winnipeg will provide to the University of Saskatchewan, a full accounting of the project, signed by the relevant financial officer and Dr. Tom Carter from The University of Winnipeg, using Tri-Council Form 300, on or before April 30 of each year for the fiscal year ending March 31, so that the University of Saskatchewan can report back to SSHRC on behalf of the overall project. The signature of the financial officer certifies that the funds were administered on behalf of Dr. Tom Carter according to SSHRC's policies and regulations;
- ❖ The University of Winnipeg has the right and responsibility to withhold or withdraw approval of expenditures proposed by Dr. Tom Carter that do not comply with SSHRC's regulations or with the policies of the University of Saskatchewan and, as appropriate, to seek advice or a ruling from the University of Saskatchewan;
- ❖ The University of Winnipeg will forward the statement of account on Form 300 to (and send a copy to Dr. Lou Hammond Ketilson):

Barb Geib, Financial Analyst  
Financial Reporting, University of Saskatchewan  
230-105 North Road, Saskatoon, SK S7N 4L5

[Fax: (306) 966-8833, Phone: 966-8308, E-mail: [barb.geib@usask.ca](mailto:barb.geib@usask.ca)]

**and** Dr. Lou Hammond Ketilson  
Centre for the Study of Co-operatives, University of Saskatchewan  
101 Diefenbaker Place, Saskatoon, SK S7N 5B8

- ❖ The University of Saskatchewan has the right and responsibility to withhold or withdraw approval of expenditures proposed by Dr. Tom Carter that contravene SSHRC's regulations or the University of Saskatchewan's policies and, as appropriate, to seek advice or ruling from SSHRC.
- ❖ The University of Winnipeg will maintain the relevant documentation on file (i.e. copies of the transfer letter, supporting documentation for all expenditures and all financial statements [Form 300]). In particular, The University of Winnipeg must be able to provide the University of Saskatchewan, on request, with copies of documents that detail all transactions involving the funds so that they readily available for review during a Tri-Council monitoring visit at the University of Saskatchewan.
- ❖ The University of Winnipeg will permit the University of Saskatchewan to review its records and facilities in the same manner that, under the Tri-Council MOU, SSHRC is permitted to review those of the University of Saskatchewan;
- ❖ Each co-investigator at The University of Winnipeg will be given a copy of this subtransfer agreement letter such that all relevant information concerning any conditions that SSHRC has imposed on the use of the grant or award and any constraints on its deployment will be clearly defined to all investigators.
- ❖ In an effort to assist Dr. Lou Hammond Ketilson with the management of the project, Dr. Hammond Ketilson requests that Dr. Tom Carter submit to her a report on research activities carried out, no later than February 28, 2007. Should it be determined that sufficient progress has been reached, a similar agreement to this one will be provided for signature to continue funding in the 2007-2008 year. A final report is due 3 months before the end of the project

If you are in agreement with this arrangement, please sign the two originals of this letter and return one to our office. At that time, Dr. Lou Hammond Ketilson will arrange for a cheque in the amount of \$53,650 to be sent to your office.

Sincerely,

Agreed

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David Harris, University of Saskatchewan

---

Dr. Alaa Abd-El Aziz, University of Winnipeg

---

Dr. Lou Hammond Ketilson

---

Dr. Tom Carter

cc: Dr. Lou Hammond Ketilson, Centre for the Study of Co-operatives, University of Saskatchewan  
Barb Geib, Financial Reporting, University of Saskatchewan



## Mission, Goal, Objectives, and Guiding Principles

### ***Mission Statement:***

To serve as a focal point for community-based research and to integrate the social research needs and knowledge of community-based organizations with the technical expertise available at the University.

### **Goal:**

To build the capacity of researchers, community-based organizations and citizenry to enhance community quality-of-life.

### **Objectives:**

1. To bring together community organizations and University researchers interested in social research and community change.
2. To undertake research on behalf of community-based clients.
3. To serve a useful social purpose within the community by raising the awareness of issues, providing credibility to social reporting, evaluating research proposals, results and impacts of programs.
4. To assist community-based organizations within Saskatchewan to conduct their own research.
5. To ensure that the results of research are transmitted quickly and effectively into the community in the form of policy and services.
6. To be regarded within Saskatchewan and the University as the source for community and social research and data. To serve as a clearinghouse for community-based data accessible to researchers, community organizations and the general public.
7. To train students to play a more meaningful role within their communities.

### ***Guiding Principles for CUISR and CUISR Participants:***

*CUISR is committed to accurate reporting of research results in the public domain, taking into account the needs for confidentiality in gathering, dissemination and storage of information and the need for objectivity and neutrality in research. CUISR will communicate the results of research and facilitate collaboration between participants.*

1. Participants agree on the vision, mandate, goals and holistic approaches (of the Institute).
2. Participants are committed to making contributions in various forms, as necessary, to support the vision and goals.
3. Participants will engage in open communication, sharing knowledge, rationales and decisions, and actively listen to all diverse/divergent points of view.
4. Participants are committed to learning together and building knowledge together.
5. Participants recognize and have methods to resolve conflicts.
6. Participation is evolving and dynamic, open to new partnerships.
7. Participants will be responsive to community and university needs, concerns and pursuit of knowledge.
8. Participants recognize how each person contributes to making the Institute greater than the sum of its parts.
9. Participants work cooperatively and are responsible to reach 'best' solutions through consensus decision-making. Where consensus cannot be reached, majority vote will be used as a decision making mechanism.
10. Participants will be open to multiple methods and approaches.

***Building healthy, sustainable communities.***

## Appendix 9 Document 13

Memorandum of Understanding made this    day of    , 2007.

BY AND BETWEEN:

\_\_\_\_\_ hereinafter referred to as the Community-Based Organization (CBO)

AND

\_\_\_\_\_ hereinafter referred to as the Intern

AND

\_\_\_\_\_ Community-University Institute for Social Research  
hereinafter referred to as CUISR.

WHEREAS it is the purpose of the CUISR Internship to encourage community-based research, transfer the results of that research directly into the community and attract the highest quality graduate students to the University of Saskatchewan: and

WHEREAS it is understood that all parties share an interest in fulfilling CUISR's Mission, Goals and Objectives, and that all parties share an interest in the outcomes of the CUISR Internship: and

WHEREAS the CBO and the Intern agree to fulfill the objectives of the CUISR Internship as specified in the CUISR Internship Proposal and as accepted by CUISR (hereinafter referred to as the Proposal).

THIS AGREEMENT WITNESSES that the parties hereto have a mutual understanding as follows:

1. The CBO, the Intern, and CUISR Representatives will:

- Abide by the Guiding Principles for CUISR and CUISR Participants with regard to the CUISR Internship;
- Meet regularly regarding the progress toward the goals and objectives of the CUISR Internship as specified in the Proposal.

2. In return for the CUISR Internship, the CBO and the Intern will:

- Acknowledge the contribution of CUISR in conference presentations, public forums, published papers, chapters, books or reports, that are prepared or submitted during the period of the award and that relate to the research program described above;
- Agree to their accomplishments of the CUISR Internship being used in promotional materials of CUISR at the discretion of the Board of Directors;
- The Intern will provide to the Co-Directors of CUISR at the conclusion of the CUISR Internship, (no later than 60 days after the CUISR Internship ends) a report suitable for contribution to the CUISR Resource Library and series of publications (e.g. practitioner's report, demonstration, research product etc.). Module Co-Leaders or Co-Directors will review the report and provide feedback for change in order to ensure that the final outcome meets the standards and expectations of CUISR.
- Agree that CUISR maintains final editorial license regarding dissemination of research and reports. It is understood that this refers to changes in format, consistency of style to fit to CUISR publication standards, and the dissemination of research results.

3. The CBO will:

- Provide all of the resources and infrastructure (e.g. supplies, staff, space, appropriate supervision) needed to complete the CUISR Internship.
- Provide the funds to support the Internship Stipend and the administrative costs of it (total of \$6,000).

4. CUISR will:

- Hold and administer all of the funds committed to the CUISR Internship;
- Pay the CUISR Internship Stipend directly to the Intern as a monthly salary. The employer expense for mandatory social programs and vacation leave will be deducted from the CUISR Internship Stipend. See Section 5. Terms of Employment.

5. Terms of Employment:

Salary per month: \_\_\_\_\_

Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Vacation Pay: \_\_\_\_\_

Work Schedule: \_\_\_\_\_

- The CUISR Internship Stipend is subject to source deductions for Income Tax, Canada Pension Plan, and Employment Insurance.

6. Dissolution of this agreement:

- Should any one of the parties to this Memorandum become partially or completely unable to fulfill the obligations of the CUISR Internship, that party will notify all other parties at the earliest possible opportunity. It is the responsibility of the party making a verbal notification to follow-up with written notification of same.
- Intern position may be terminated without notice should the objectives of the proposed project not be satisfactorily met.

Authorship and acknowledgement of the final reports to CUISR will be determined in consultation between the researcher and CUISR. In the event that there is disagreement between the parties involved, CUISR retains the final right to specify authorship and acknowledgements.

\_\_\_\_\_  
Louise Clarke, University Co-Director

\_\_\_\_\_  
Signature for Community-Based Organization

\_\_\_\_\_

\_\_\_\_\_  
Bill Holden, Community Co-Director

\_\_\_\_\_  
Intern

\_\_\_\_\_

Attachments:

- Mission Statement of CUISR
- Guiding Principles for CUISR and CUISR Participants
- Related Research Proposal \_\_\_\_\_

## Appendix 9 Document 14

### Linking, Learning, Leveraging Social Enterprises, Knowledgeable Economies, and Sustainable Communities

#### Cluster 1: Social Economy Development Cluster

*Some Thoughts for Direction, February 5, 2006*

*After reconstructing my notes from last week's meeting, I am struck by the amount of thought and insight that was advanced by the participants in this first cluster meeting – for such a short time together we covered a lot of ground! The following is my attempt to synthesize the ideas advanced into the beginning of a discussion paper – again, I don't expect that I have gotten it “right” in this first attempt. Hopefully your contributions over the next couple of weeks will lead us closer to identifying the research questions and objectives of the research, so that we can begin to draft a timeline and select appropriate methodologies.*

#### **Vision/Principles/Objectives of the Social Enterprise Development Cluster**

According to the proposal submitted to SSHRC, the Linking, Learning Leveraging research project is designed to explore the social economy with the specific goal of developing “comprehensive profiles of social economy organizations, highlighting innovative organizational structures, internal and external processes for community and member engagement, effective financing strategies and comprehensive measures of organizational and community outcomes”. The research project is particularly interested in exploring whether practices in the development, evolution and evaluation of social economy initiatives require cultural adaptation to meet the needs of diverse groups, particularly Indigenous peoples.

Within that context, the Social Enterprise Cluster was assigned an approach that “focuses on relationships – among the stakeholders of social enterprises; between the enterprises and public regulatory institutions; with other social enterprises; with the broader civil society; and with private-sector enterprises”.

The research was envisioned in the proposal as encompassing:

- Studies of both “neighbourhood-based enterprises and identity-based enterprises in different socio-economic settings” including both cities and rural areas
- “Investigate the roles of social enterprises in promoting more forms of social integration”
- “Investigate the networks of relationships in which leaders and staff engage”
- “Highlight the cultural and social values that inform practices within the enterprises” from planning to outcomes

The methodology was envisioned as including:

- Both “actor-centred and structural” methodologies

- Qualitative including case studies and participatory action research
- Deliberative dialogue among participants in the case-study analyses
- “This action-oriented approach to the research will provide a unique opportunity, not to create a homogenized conclusion to our work, but rather to enhance understanding of policies and effective practices, as well as to confront the issues that limit the capacity for building appropriate alliances”

## Appendix 10: Leveraging of Funding (funds by source by year)

| External funds leverage (a part of SSHRC grant) and including host institutions contributions   |           |           |           |           |           |         |
|-------------------------------------------------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|---------|
| Years                                                                                           | 2005-2006 | 2006-2007 | 2007-2008 | 2008-2009 | 2009-2010 | Total   |
| <b>Partners</b>                                                                                 |           |           |           |           |           |         |
| <b>Partner organization – CESD – Northern Ontario region</b>                                    |           |           |           |           |           |         |
| FedNor                                                                                          | \$17,500  | 35,000    | 77,500    |           |           | 130,000 |
| 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    | 75,000    |           |           | 85,000  |
| Human Resources and Social Development Canada                                                   | 5,000     |           |           |           |           | 5,000   |
| Community Development Corporation                                                               | 5,000     |           | 3,500     |           |           | 8,500   |
| Community Economic and Social Development Programme                                             | 17,500    | 38,500    | 35,500    |           |           | 91,500  |
| 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  |
| Ontario Cattlemen's Association                                                                 |           |           | 16,040    |           |           | 16,040  |
| Algoma University College                                                                       |           |           | 9,000     |           |           | 9,000   |
| Ministry of Northern Development and Mines                                                      |           |           | 27,500    |           |           | 27,500  |
|                                                                                                 |           |           |           |           |           |         |
| <b>Partner organization – WIRA – Manitoba region</b>                                            |           |           |           |           |           |         |
| 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     |
| Heifer International                                                                            |           |           | 20,000    |           |           | 20,000  |
| Manitoba Conservation Sustainable Development and Innovations Fund                              |           |           | 20,000    |           |           | 20,000  |
| SEED Winnipeg                                                                                   |           |           | 581       |           |           | 581     |
| Co-op Charitable Trust                                                                          |           |           | 1,420     |           |           | 1,420   |
|                                                                                                 |           |           |           |           |           |         |
| <b>Partner organization – CUISR – Saskatchewan region</b>                                       |           |           |           |           |           |         |
| Saskatchewan Association for Community Living                                                   |           | 9,000     |           |           |           | 9,000   |
| Urban Aboriginal Strategy                                                                       |           | 15,500    |           |           |           | 15,500  |
| Cypress Hills Ability Centres Inc.                                                              |           |           | 12,000    |           |           | 12,000  |

|                                                                                                                                 |                |                |                |               |               |                  |
|---------------------------------------------------------------------------------------------------------------------------------|----------------|----------------|----------------|---------------|---------------|------------------|
| <b>Principal investigator – Lou Hammond Ketilson – Saskatchewan</b>                                                             |                |                |                |               |               |                  |
| University of Saskatchewan                                                                                                      | 20,000         | 20,000         | 20,000         | 20,000        | 20,000        | 100,000          |
| Canadian International Development Agency                                                                                       |                | 16,000         |                |               |               | 16,000           |
| Canadian Co-operative Association                                                                                               |                | 4,000          |                |               |               | 4,000            |
| University of Saskatchewan                                                                                                      |                | 2,500          |                |               |               | 2,500            |
| Indian and Northern Affairs Canada                                                                                              |                |                | 21,200         |               |               | 21,200           |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Academic partner – Rose Olfert – Saskatchewan</b>                                                                            |                |                |                |               |               |                  |
| Co-operatives Secretariat                                                                                                       |                | 17,000         |                |               |               | 17,000           |
| Centre for the Study of Co-operatives                                                                                           |                | 12,000         |                |               |               | 12,000           |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Academic partner – Brett Fairbairn – Saskatchewan</b>                                                                        |                |                |                |               |               |                  |
| SSHRC Standard Research Grants — “Cognition and Governance in the Social Economy”                                               |                | 123,930        |                |               |               | 123,930          |
| SSHRC — “Strategic Research Network on Social Innovation, the Social Economy, and Civil Society”                                | 25,000         |                |                |               |               | 25,000           |
| President’s SSHRC Research Fund                                                                                                 | 5,000          |                |                |               |               | 5,000            |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Academic partner – Murray Fulton – Saskatchewan</b>                                                                          |                |                |                |               |               |                  |
| 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          |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Academic partner – Michael Gertler – Saskatchewan</b>                                                                        |                |                |                |               |               |                  |
| Advancing Canadian Agriculture and Agri-Food Saskatchewan                                                                       |                |                | 10,000         |               |               | 10,000           |
| Centre for the Study of Co-operatives                                                                                           |                |                | 10,000         |               |               | 10,000           |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Academic partner – Roger Herman – Saskatchewan</b>                                                                           |                |                |                |               |               |                  |
| Association of Cooperative Educators                                                                                            |                | 13,500         |                |               |               | 13,500           |
| Co-operatives Secretariat                                                                                                       |                | 16,000         |                |               |               | 16,000           |
| Co-operatives Secretariat                                                                                                       |                | 8,300          |                |               |               | 8,300            |
|                                                                                                                                 |                |                |                |               |               |                  |
| <b>Total</b>                                                                                                                    | <b>153,408</b> | <b>725,300</b> | <b>449,714</b> | <b>20,000</b> | <b>20,000</b> | <b>1,368,422</b> |

## Appendix 11: Plan for Knowledge Dissemination and Communication

### *Books*

- “Co-operative Innovations and the Social Economy: Theory and Practise,” based on selected papers from joint conference of CASC, ACE, ICA, May 2007
- “The Social Economy of Northern Ontario, Manitoba, and Saskatchewan: Case Studies and Best Practise,” based on midterm research results
- “Women and the Social Economy: Overcoming Adversity and Exclusion,” drawn from total project results
- “Leadership in the Social Economy,” by Cluster 5 academic co-lead Cristine de Clercy

### *Book Chapters*

- Chapter for CIRIEC International book titled “Measuring the Social Economy” — “The Social Economy in Aboriginal Communities”
- Others as initiated by researchers in relevant venues

### *Journal Articles/Special Editions*

- CIRIEC special edition on the Social Economy in Aboriginal Communities, December 2007 deadline, publication December 2008
- *Canadian Journal of Urban Research* special issue
- Relevant journals — as many as possible but in particular — *Annals of Public and Cooperative Economics*, *Journal of Co-operation*, *International Journal of Co-operation*, *CIRIEC Canada*, and *Community Development: Journal of the Community Development Society*

### *Monographs* (oriented to practitioner usage) — print and electronic

- Research report for each project — jointly with WIRA/CUISR/CESD — consider *Making Waves* as venue; other practitioner-oriented journals
- Case studies — jointly, with WIRA/CUISR/CESD
- *Occasional Papers* (oriented to academic/student usage) — synthesis or meta analysis of research — print and electronic

### *Practitioner-Oriented Resources/Practices* — print and electronic

- Research/resource toolkits
  - Developing Aboriginal co-operatives
  - Community-supported agriculture — a resource for the development of CSAs
  - Toolkit for governance in the social economy
  - Toolkit for measuring performance in the social economy
- Training materials for student researchers — conducting community-based research
- One-page fact sheets specific to each completed research project
- Poster displays summarizing each project

### *Policymaker-Oriented Resources/Practices* — print and electronic

- GIS maps of co-operatives, credit unions and other social enterprises
- Databases, inventory of social economy organizations

### *Newsletters* — print and electronic

- Annual project newsletter targeted to partners
- In the Centre’s newsletter targeted to co-ops and social economy partners — two times per year
- Within partner newsletters — e.g., Saskatchewan Economic Developers Association, Saskatchewan Council for Community Development, Community-University Institute for Social Research, Community Development Society of Saskatchewan, Ontario Co-operative Association, Canadian CED Network, Canadian Co-operative Association, and others

### *Workshops and Symposia*

- Annual project workshops in each province
- Partner with Knowledge Impact in Society project led by academic partner Murray Fulton to hold community fora in rural Saskatchewan

- Interactive and topic-specific workshops by invitation only for: 1) policymakers to discuss relevance to policy and potential policy changes; 2) researchers to discuss intersections with similar research, to initiate other research, to build upon or supplement what was done; and 3) movers-and-shakers to discuss action plans and strategies for positive change based on research findings
- Community consultations
- Policy fora
  - One-on-one meetings between research project team and targeted policymaker/politician/community leaders to build interest in specific policy and program implications of the research

#### *Conferences*

- Inaugural Regional Symposium, January 2006 (international)
- Second Regional Symposium, February 2007 (regional)
- Joint meetings of Canadian Association for Studies in Co-operation/Association of Cooperative Educators/International Co-operative Alliance at the Congress of the Humanities and Social Sciences, May 2007 (international)
- Participation in CCEDNet Conference (May 2008) with other project partners
- Conference, September 2009 (international)

#### *Curriculum Development*

##### *Undergraduate*

- University of Saskatchewan — Management 498.3 Business and Community, the capstone course for the Management of Co-operatives major, Management of Social-Economy Organizations stream, College of Commerce
- Community Economic and Social Development (CESD) program, Algoma University College — Qualitative methods courses in both CESD and Sociology departments of Algoma University College are being adjusted to reflect new methodological learnings in community-based research methods. These qualitative methods courses will also be adjusted to reflect the experience gained in working with Indigenous communities. The CESD courses, including field placement courses, will also be adjusted to reflect the learnings gained from working with community groups and extending the social economy in the region and internationally. One “special topics in CESD” course on co-operatives as a CESD strategy will be offered in June 2007. The curriculum for this course is being designed by a member of one of the partners in the Social Economy project, OnCoop in Ontario.
- University of Winnipeg — Research from the project will contribute a module on social economy, social enterprise, and co-operatives to course content for 60.3110/3: Poverty-Focussed Development in the International Studies Program

##### *Graduate*

- Graduate student workshop on community-based research methods, Saskatchewan, May 2007
- University of Saskatchewan — Co-operatives and Sustainable Development, Co-operative Studies Concentration, Interdisciplinary Graduate Program
- University of Saskatchewan — Methods in Conducting Community-Based Research, Co-operative Studies Concentration, Interdisciplinary Graduate Program
- University of Saskatchewan — Aboriginal Economic Development, Concentration in Indigenous Management, MBA program, College of Commerce
- University of Western Ontario — Politics 542b: Public Policy, offered winter 2007. Concerns public policy and Canada’s community and voluntary sector. Participation in the Social Economy project will enhance and deepen the instructor’s ability to teach the course, as well as inform the curriculum content.

#### *Web-Based Discussion Site*

- At present — on the project website for use of project team only
- In future — open to participants in the region

#### *Community-Based Delivery of Research Information*

- CUISR Brown Bag Lunches
- Webcast/podcasts
  - Collaborating with Southern Ontario to present Aboriginal Issues in the Social Economy, 28 March 2007

## **Appendix 12: List of Events and Activities**

Linking, Learning, Leveraging Management and Project Activities to Date  
September 2005 – March 2008

### 2005

- September** Dr. Lou Hammond Ketilson of the Centre for the Study of Co-operatives and Community-University Institute for Social Research awarded SSHRC grant for Linking, Learning, Leveraging / Réseaux, connaissances, synergies (LLL/RCS) project
- October 21** Lou met with Northern Ontario community and academic partners to discuss project structure and research directions — Sault Ste. Marie
- November 7** LLL/RCS preliminary meeting in Saskatoon with Saskatchewan community and academic partners to discuss project structure and research directions
- November 8** Lou, Brett Fairbairn, and project administrator Lorraine Salt met with Winnipeg Inner-City Research Alliance and Manitoba academic and community partners to discuss project structure and research directions — Winnipeg
- November 14** University of Saskatchewan reception and press release to celebrate the awarding of the largest SSHRC grant in U of S history, for LLL/RCS

### 2006

- January 25** LLL/RCS Management Board meeting by conference call to discuss the symposium
- January 26–27** Two-day symposium with ~75 regional community and academic partners, including the first meetings of research clusters to identify research directions; clusters met and discussed initial research questions, directions, associated methodologies, and possible collaborations
- March 10** LLL/RCS Management Board meeting by conference call
- March/April** First transfers to other provincial partners: Community-University Institute for Social Research (CUISR), Winnipeg Inner-City Research Alliance (WIRA), Community Economic and Social Development Unit (CESD), and two clusters
- April 20–21** Northern Ontario two-day workshop, where more than thirty community partners participated in a strategic planning session; meeting included a round-table discussion where community partners voiced their appreciation for the workshop and how valued it made them feel; critical questions were raised about Francophone isolation, awareness of the social economy, sustainability in the North, inclusion of youth, community development, international contexts, and networking and communication strategies; numerous internship projects have come out of the partnerships in Northern Ontario, including Community Resilience Sault Ste. Marie; The Socio-Economic Impact of the Arts in the City of Sault Ste. Marie; “Buy Local Beef”; Algoma Co-operative Beef Marketing Study; ASOPRICOR project; Ontario Disability Support Program; Coalition of

Algoma Passenger Trains; Garden River First Nation Performance of Hiawatha; Developing and Retaining Human Capital in First Nations; Women and Community Economic Development in Northern Ontario; Community Supported Agriculture Project; Aboriginal Women in Non-Profits

- May 29** Toronto in-person LLL/RCS Management Board meeting, in conjunction with Canadian Association for Studies in Co-operation/Congress of the Humanities and Social Sciences meetings at York University; participants identified and discussed further research directions and methodologies as well as proposed internships; also shared the compilation of research themes and goals identified at the Saskatchewan symposium
- September** Creation of LLL/RCS project display banner and logo
- September 8** LLL/RCS Management Board meeting by conference call re upcoming SSHRC site visit
- Fall** Major upgrade of LLL/RCS project website  
<http://www.usaskstudies.coop/socialeconomy>
- October 3** SSHRC site visit: Éric Bastien and Marc Fonda met with LLL/RCS project Management Board and several community partners
- October 3** Meeting with several academic partners (in conjunction with SSHRC site visit and Council for the Advancement of Native Development Officers conference); suggestion to hold second regional LLL/RCS symposium in Manitoba
- November 24** Conference call to plan Francophone project —Initiatives, pratiques et appuis au développement économique communautaire : la participation de l'économie sociale dans la construction des capacités des communautés francophone: Nord de l'Ontario, Manitoba et Saskatchewan — Rachid Bagaoui is project lead
- December 4** LLL/RCS Management Board meeting by conference call to discuss upcoming Saskatchewan workshop
- December 5** First Saskatchewan LLL/RCS workshop with community partners — one-day event with thirty-four attendees; began with a presentation by PhD student interns on the Exploring the Social Economy in Saskatchewan: Urban, Rural, and Northern project; participants then held group discussions on questions relating to the five cluster themes to identify future internship research projects; a poster session described six research projects underway; food was provided by a community partner organization

## 2007

- January 31** Deadline for Letters of Intent for Saskatchewan community internship proposals to CUISR
- February** French version of the LLL/RCS project display banner and logo produced
- February 18** In-person LLL/RCS Management Board meeting to discuss Milestone Report and upcoming Winnipeg Symposium
- February 18-20** Winnipeg Symposium, the second project-wide gathering of partners from across the region; forty-four academics and community partners gathered for a

- day and a half to discuss future research needs; included a poster display of the eighteen projects underway to date; meals were provided by Winnipeg social economy organizations
- February 20** Following the symposium, Northern Ontario project partners held their workshop to refine research priorities
- February 20** Following the symposium, Manitoba project partners held their workshop to discuss the latest call for internship proposals
- March 26** Deadline for Letters of Intent for Manitoba community internship proposals; no decisions made in time for Milestone Report
- March 28** Webcast presentation by Alice Corbiere, Rosalind Johnston, and José Reyes (Northern Ontario LLL/RCS project partners) as part of the Southern Ontario regional node's OISE Social Economy Centre web series; presentation is titled An Aboriginal Perspective on the Social Economy, a panel discussion
- March 31** Submission of Milestone Report
- May 27** Building Respectful Relationships: Conducting Community-Based Research, a workshop for graduate students studying the social economy, 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.
- May 28-June 1** From 28 May to 1 June, the Centre for the Study of Co-operatives, on behalf of the LLL project, hosted 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.
- May 28** In person meeting of members of LLL/RCS Management Board attending Congress — Saskatoon
- October 11** LLL/RCS Management Board meeting by conference call
- October 23-25** In person meeting of members of LLL/RCS Management Board attending CIRIEC Conference — Victoria
- 2008
- January 11** WIRA hosts second annual workshop for Manitoba project partners. Community and academic partners and student researchers provided excellent presentations on six research projects in various stages of completion to an audience of 25 participants. Planning for the 2008 Call for Research Proposals was also conducted — Winnipeg

- February 8** CESD delivered a “train the trainer” workshop in community economic development. Co-sponsored by CCEDNet, the workshop drew 40 participants in person and another 20 joined the session on-line — Sault Ste. Marie
- February 9, 10** CESD hosted the Northern Ontario project partners’ workshop. The results from six research projects were presented on the first day; the second day was devoted to research planning. Thirty community, academic, and student researchers were present — Sault Ste. Marie
- February 29** LLL/RCS Management Board meeting by conference call to discuss Mid-Term Review report
- April 28, 29** Northern Ontario Women’s Economic Development Conference, co-sponsored by CESD — Thunder Bay
- May 2** CUISR hosts second annual provincial workshop for Saskatchewan research partners; a training event focused on research mentorship models is planned
- May 21** In person meeting of members of LLL/RCS Management Board in conjunction with CCEDNet conference —Saskatoon
- October** LLL/RCS Management Board meeting by conference call

2009

- February** LLL/RCS Management Board meeting by conference call
- Fall** Regional Symposium

**Appendix 13: Evaluation Guide**  
**Social Economy Research Suite**  
**Northern Ontario, Manitoba, and Saskatchewan Regional Node**

*Linking Learning Leveraging*

**Survey Guide**

**For use at regional symposia, workshops, planning meetings, etc.**

Please take a few minutes to administer this simple evaluation at the end of your event. This exercise examines stakeholders' experiences as part of the overall Node project as well as their individual research projects. For some people this may duplicate what they complete as project evaluations, but for others this may be the only opportunity to contribute feedback. The intention is to conduct an informal discussion with the group as a whole. Obviously not everyone will choose to contribute, but try to get an overall picture of people's experiences. The information collected will be used to corroborate that collected with other evaluations and will be used to help shape ongoing and future activities. All information collected will be treated as confidential: results will be reported in aggregate form and comments will not be attached to individual respondents or projects.

Please ask for impressions and feedback on the following topics:

- opportunity to help **select/design/shape the research** undertaken
- overall node **management** and specific project management
- the **value and relevance of the research** conducted
- what **impact the research** has had
- the appropriateness and effectiveness of any **research dissemination**
- the extent to which this research helped to develop people's **research or project management skills**
- whether this a good example of, or model for, **community – university** collaboration

Keep your questions open-ended and encourage discussion among the group. Be sure to designate someone to take accurate notes of the discussion and impressions of peoples' reactions to the questions. Please try to attribute comments to categories of stakeholders eg. (academics, community based partner, student etc.) Try to engage as many people as possible in the discussion and probe for deeper meanings or clarifications. Ask for specific examples to illustrate comments. Forward the notes to Lou Hammond Ketilson or Heather Acton as soon as possible following the event.

**Thank you for your input.**

**Social Economy Research Suite**  
**Northern Ontario, Manitoba, and Saskatchewan Regional Node**

*Linking Learning Leveraging*

**Survey of Research Project Stakeholders**

Please take a few minutes to complete the following survey. This survey examines stakeholders' experiences with individual research projects that together form the overall Regional Node project. The information will be used to help evaluate the specific research project, the Node's activities to date, and in turn to help shape ongoing and future activities. All information collected will be treated as confidential: results will be reported in aggregate form and comments will not be attached to individual respondents or projects. This electronic form will grow to accommodate your comments. There is no space limit. This form is in Microsoft Word format. Please perform occasional "saves" and a final "save document" before returning.

1. Research Project Identification: **Please name or describe project and indicate completion date:**

**For each of the following questions, please check one response and complete comments section.**

2. In regards to this specific research project, are you:

- an academic researcher associated with a university or some other research institution;  
 a representative of a community-based organization; or,  
 a student involved in conducting the research?

3. Both academic researchers and community partners contributed in meaningful ways to the **overall design of this project** (including the research design and implementation, management, and knowledge mobilization)

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

4. This project was **well managed** (consider factors such as information collection and sharing, financial management, communications, support and advice, problem solving, implementation of agreements and protocols, timely and consistent decision making).

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

5. The **research undertaken** in this project was appropriately conducted and was relevant to and useful for the various stakeholders involved.

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

6. This project produced outcomes that had, or will have, a positive **impact** for the various stakeholders (eg. access to additional resources, development of new networks or relationships, additional capacity, new projects or initiatives, change to policy, etc.)

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

7. This project's **knowledge dissemination** efforts were effective and appropriate for the various stakeholders involved.

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

8. Involvement in this project has helped me to develop or hone my **research and project management skills** and has better prepared me for involvement in future similar projects.

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible – provide examples)

9. This research project exemplified effective and meaningful **community – university collaboration**.

1.  (strongly disagree)      2.  (mostly disagree)      3.  (agree)      4.  (mostly agree)      5.  (strongly agree)

**Comments:** (please be as specific as possible)

**Thank you for your input.**

**Appendix 15: Social Economy Statement of Account — April 1/06 – March 31/07**

Funds available for Current Year: **\$674,663.21**

Expenditures Incurred for Current Year

1) Salaries for students

a) Bachelor's **\$16,005.55**

University of Winnipeg \$ 2,821.23  
Algoma University College \$13,184.32

b) Master's

University of Winnipeg \$5,963.13 **\$ 5,963.13**

c) Doctorate

CUISR \$20,508.54  
Main Fund -Centre \$13,121.19  
(Scholarship for Mitch Diamantopoulos) **\$33,629.73**

2) Salaries (non-students)

b) Other

CUISR \$18,155.74  
Main Fund-Centre \$ 589.46  
(Luke Sather's Website work) **\$18,745.20**

4) Professional and Technical Services/Contracts **\$12,622.55**

University of Winnipeg \$6,133.64  
Algoma University \$6,488.91

5) Equipment

Algoma University \$2,685.80 **\$2,685.80**

6) Materials, supplies, other expenditures **\$30,912.61**

University of Winnipeg \$ 191.42  
Algoma University \$14,318.45  
CUISR \$ 6,149.21  
Main Fund-Centre \$10,253.53

7) Travel

Algoma University \$ 9,019.11  
CUISR \$ 1,312.55  
Main Fund-Centre \$16,452.44 **\$26,784.10**

**Total Expenditures for the year \$147,348.67**

## Appendix 16: Project Expenditures — April 1 – December 31/07

### SSHRC – Social Economy fund expenditures (April-December 2007):

|                                                  |             |                    |
|--------------------------------------------------|-------------|--------------------|
| 1) Salaries for students                         |             |                    |
| <i>Master's</i>                                  |             |                    |
| CUISR                                            | \$24,409.15 | <b>\$24,409.15</b> |
| <i>Doctorate</i>                                 |             |                    |
| CUISR                                            | \$ 4,865.48 |                    |
| Main Fund -Centre                                | \$27,457.18 | <b>\$32,322.66</b> |
| 2) Salaries (non-students) - Other               |             |                    |
| CUISR                                            | \$12,130.23 |                    |
| Main Fund-Centre                                 | \$ 315.00   | <b>\$12,445.23</b> |
| 3) Materials, supplies, other expenditures       |             |                    |
| CUISR                                            | \$ 399.62   |                    |
| Main Fund-Centre                                 | \$3,471.76  | <b>\$ 3,871.38</b> |
| 4) Travel                                        |             |                    |
| CUISR                                            | \$1,130.74  |                    |
| Main Fund-Centre                                 | \$5,889.00  | <b>\$ 7,019.74</b> |
| <b>Total Expenditures (April/07-December/07)</b> |             | <b>\$80,068.16</b> |

### SSHRC – Faculty RTS Fund:

#### *Revenue:*

|                                              |         |                 |
|----------------------------------------------|---------|-----------------|
| Funds received for 2005-06 (October 31 2005) | \$2,400 |                 |
| Funds received for 2006-07 (Sept. 20/06)     | \$7,200 |                 |
| Funds received for 2007-08 (Sept. 19/07)     | \$7,200 | <b>\$16,800</b> |

#### *Expenditures:*

|                                                |         |  |
|------------------------------------------------|---------|--|
| Lou's RTS for 3 years (2005-6; 2006-7; 2007-8) | \$7,200 |  |
|------------------------------------------------|---------|--|

**Total Expenditures until December 2007** **\$ 7,200**

### University of Saskatchewan VP Research Fund:

#### *Revenue received:*

|                                                |          |                    |
|------------------------------------------------|----------|--------------------|
| Funding for 2005-06 (received July 7 2006)     | \$20,000 |                    |
| Funding for 2006-07 (received October 10 2006) | \$20,000 |                    |
| Funding for 2007-08 (received October 3 2007)  | \$20,000 | <b>\$60,000.00</b> |

#### *Expenditures (September 2006-December 2007):*

|                                  |             |  |
|----------------------------------|-------------|--|
| Salaries for Students – Master's |             |  |
| Sept. 2006- March 2007           | \$20,967.46 |  |
| April -December 2007             | \$ 9,080.31 |  |

**Total Expenditures until December 2007** **\$30,047.77**

## Disbursement of funds from SSHRC Social Economy project

### CUISR:

|                                        |                  |
|----------------------------------------|------------------|
| Funding for year 1 (May 2006)          | \$ 77,650        |
| Funding for year 2 (May 2007)          | <u>\$ 77,650</u> |
| <b>Total funds transferred to date</b> | <b>\$155,300</b> |

### Morris Altman:

|                                       |          |
|---------------------------------------|----------|
| One-time funding provided (Cluster 4) | \$ 7,000 |
|---------------------------------------|----------|

### Algoma University College:

|                                                                                                                         |                  |
|-------------------------------------------------------------------------------------------------------------------------|------------------|
| Funding for year 1 (April 2006)                                                                                         | \$ 57,250        |
| *Note: This amount was disbursed as (\$47,750 – CESD program;<br>\$9,500 – Cluster 1)                                   |                  |
| Funding for year 2 (June 2007)                                                                                          | \$ 91,050        |
| *Note: This amount was disbursed as (\$19,000 –Cluster 1;<br>\$66,050 – CESD program; \$6,000 – transfer for Cluster 4) |                  |
| <b>Total funds transferred to date</b>                                                                                  | <b>\$148,300</b> |

### University of Winnipeg:

|                                        |                  |
|----------------------------------------|------------------|
| Funding for year 1 (May 2006)          | \$ 53,650        |
| Funding for year 2 (June 2007)         | <u>\$ 71,950</u> |
| <b>Total funds transferred to date</b> | <b>\$125,600</b> |

### University of Manitoba:

|                                        |                  |
|----------------------------------------|------------------|
| Funding for year 1 (August 2006)       | \$ 9,500         |
| Funding for year 2 (December 2006)     | <u>\$ 34,000</u> |
| <b>Total funds transferred to date</b> | <b>\$ 43,500</b> |

### University of Western Ontario:

|                                        |                 |
|----------------------------------------|-----------------|
| Funding for year 1 (September 2007)    | \$ 6,000        |
| Funding for year 2 (September 2007)    | <u>\$33,000</u> |
| <b>Total funds transferred to date</b> | <b>\$39,000</b> |

### Appendix 17: In-Kind Contributions

| Name                                  | Year 1<br>Budget | Year 1<br>Estimate | Year 2<br>Budget | Year 2<br>Estimate | Year 3<br>Budget | Year 3<br>Estimate | Year 4<br>Budget | Year 4<br>Estimate | Year 5<br>Budget | Year 5<br>Estimate |
|---------------------------------------|------------------|--------------------|------------------|--------------------|------------------|--------------------|------------------|--------------------|------------------|--------------------|
| <b>Ontario Partners</b>               |                  |                    |                  |                    |                  |                    |                  |                    |                  |                    |
| Canadian CED Network / Réseau ca      | 0                | 0                  | 0                | 8,950              | 0                | 8,950              | 0                |                    | 0                |                    |
| CESD Community Economic and Sc        | 0                | 24,950             | 0                | 24,950             | 0                | 24,950             | 0                |                    | 0                |                    |
| Ontario Co-operative Association      | 8,950 par        |                    | 8,950 par        |                    | 8,950 <          |                    | 8,950            |                    | 8,950            |                    |
| Ontario Native Women's Associator     | 0                |                    | 0                |                    | 0                |                    | 0                |                    | 0                |                    |
| PARO Centre for Women's Enterpris     | 0                |                    | 0                | 8,950              | 0                | 8,950              | 0                |                    | 0                |                    |
| <b>Manitoba Partners</b>              |                  |                    |                  |                    |                  |                    |                  |                    |                  |                    |
| Arctic Co-operatives Ltd.             | 24,950 <         |                    | 24,950 <         |                    | 24,950 <         |                    | 24,950           |                    | 24,950           |                    |
| Assiniboine Credit Union              | 19,500 par       |                    | 19,500 par       |                    | 19,500 par       |                    | 19,500           |                    | 19,500           |                    |
| Caisse Provencher Ltée.               | 9,950 <          |                    | 9,950 <          |                    | 9,950 <          |                    | 9,950            |                    | 9,950            |                    |
| Canadian CED Network / Réseau ca      | 0                | 9,950              | 0                | 9,950              | 0                | 9,950              | 0                |                    | 0                |                    |
| Credit Union Central of Manitoba      | 24,950 <         |                    | 24,950 <         |                    | 24,950 <         |                    | 24,950           |                    | 24,950           |                    |
| Manitoba Cooperative Association Ir   | 8,950 par        |                    | 8,950 par        |                    | 8,950 <          |                    | 8,950            |                    | 8,950            |                    |
| Social Planning Council of Winnipeg   | 0                | 8,950              | 0                | 8,950              | 0                | 8,950              | 0                |                    | 0                |                    |
| Spence Neighbourhood Association I    | 0                | 9,950              | 0                | 9,950              | 0                | 9,950              | 0                |                    | 0                |                    |
| Supporting Employment and Econor      | 9,950 par        |                    | 9,950 par        |                    | 9,950 par        |                    | 9,950            |                    | 9,950            |                    |
| University of Winnipeg                | 13,633 >         |                    | 13,633 >         |                    | 13,633 >         |                    | 13,633           |                    | 13,633           |                    |
| *Winnipeg Inner-City Research Allie   | 0                |                    | 0                |                    | 0                |                    | 0                |                    | 0                |                    |
| *see U of Winnipeg                    |                  |                    |                  |                    |                  |                    |                  |                    |                  |                    |
| <b>Saskatchewan Partners</b>          |                  |                    |                  |                    |                  |                    |                  |                    |                  |                    |
| Canada Rural Economy Research La      | 0                |                    | 0                |                    | 0                |                    | 0                |                    | 0                |                    |
| Child Hunger and Education Prograr    | 0                | 8,950              | 0                | 8,950              | 0                | 8,950              | 0                |                    | 0                |                    |
| Common Works Development Instit       | 9,950 <          |                    | 9,950 >          |                    | 9,950 <          |                    | 9,950            |                    | 9,950            |                    |
| Community Action Co-op Regina Lt      | 9,950            | 0                  | 9,950            | 0                  | 9,950            | 0                  | 9,950            |                    | 9,950            |                    |
| Community Futures Partners of Sask    | 0                |                    | 0                |                    | 0                |                    | 0                |                    | 0                |                    |
| Community Development Society of      | 9,950 <          |                    | 9,950 <          |                    | 9,950 >          |                    | 9,950            |                    | 9,950            |                    |
| Community Health Services (Saskat     | 9,950 <          |                    | 9,950 <          |                    | 9,950 <          |                    | 9,950            |                    | 9,950            |                    |
| CUISR Community-University Instit     | 0                | 13,633             | 0                | 13,633             | 0                | 13,633             | 0                |                    | 0                |                    |
| Credit Union Central of Saskatchewan  | 24,950 <         |                    | 24,950 <         |                    | 24,950 <         |                    | 24,950           |                    | 24,950           |                    |
| First Nations Agricultural Council of | 0                |                    | 0                |                    | 0                | 9,950              | 0                |                    | 0                |                    |
| QUINT Development Corporation         | 9,950 >          |                    | 9,950 >          |                    | 9,950 >          |                    | 9,950            |                    | 9,950            |                    |
| Saskatchewan Abilities Council        | 0                |                    | 0                | 9,950              | 0                | 9,950              | 0                |                    | 0                |                    |
| Saskatchewan Association for Comm     | 0                |                    | 0                | 9,950              | 0                | 9,950              | 0                |                    | 0                |                    |
| Saskatchewan Co-operative Associat    | 8,950 par        |                    | 8,950 par        |                    | 8,950 par        |                    | 8,950            |                    | 8,950            |                    |
| Saskatchewan Council for Communi      | 9,950 <          |                    | 9,950 <          |                    | 9,950 <          |                    | 9,950            |                    | 9,950            |                    |
| Saskatchewan Economic Developers      | 0                |                    | 0                | 8,950              | 0                | 8,950              | 0                |                    | 0                |                    |
| Saskatchewan First Nations Wholese    | 9,950 <          |                    | 9,950 <          |                    | 9,950 <          |                    | 9,950            |                    | 9,950            |                    |
| Saskatchewan Industry and Resource    | 12,500 par       |                    | 12,500 par       |                    | 12,500 par       |                    | 12,500           |                    | 12,500           |                    |
| Saskatchewan Regional Economic ai     | 12,500 par       |                    | 12,500 par       |                    | 12,500 par       |                    | 12,500           |                    | 12,500           |                    |

### Appendix 17: In-Kind Contributions

|                                       |        |        |        |        |        |        |        |        |
|---------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|
| First Sask Credit Union               | 19,950 | par    |        | par    | 19,950 | par    | 19,950 | 19,950 |
| Saskatoon Tribal Council              | 0      |        | 0      |        | 0      |        | 0      | 0      |
| Saskatoon Urban Aboriginal Strategy   | 0      | 12,500 | 0      | 12,500 | 0      | 12,500 | 0      | 0      |
| Spruce River Research                 | 9,950  | <      | 9,950  | <      | 9,950  | par    | 9,950  | 9,950  |
| TRIBE Inc.                            |        | C par  | 8,950  | <      | 8,950  | <      | 8,950  | 8,950  |
| United Way of Saskatoon               | 0      |        | 0      |        | 0      |        | 0      | 0      |
| <b><i>National Partners</i></b>       |        |        |        |        |        |        |        |        |
| British Columbia Co-operative Assoc   | 8,950  | par    | 8,950  | <      | 8,950  | <      | 8,950  | 8,950  |
| Canadian Community Investment Ne      | 0      | 12,500 | 0      | 12,500 | 0      | 0      | 0      | 0      |
| Canadian Co-operative Association     | 12,500 | par    | 12,500 | >      | 12,500 | >      | 12,500 | 12,500 |
| Canadian Worker Co-operative Fede     | 9,950  |        | 9,950  |        | 9,950  |        | 9,950  | 9,950  |
| Co-operatives Secretariat, Agricultur | 24,700 |        | 24,700 |        | 24,700 |        | 24,700 | 24,700 |
| Co-op Ventures Workers Co-operativ    | 12,500 |        | 12,500 |        | 12,500 |        | 12,500 | 12,500 |
| Kin Canada                            | 0      |        | 0      |        | 0      |        | 0      | 0      |
| Vancity Community Foundation          | 24,950 |        | 24,950 |        | 24,950 |        | 24,950 | 24,950 |
| <b><i>International Partners</i></b>  |        |        |        |        |        |        |        |        |
| Asopricor — Association for the Hol   | 0      |        | 0      |        | 0      |        | 0      | 0      |
| University of Wisconsin Center for C  | 0      |        | 0      |        | 0      |        | 0      | 0      |
| Cooperation Works, USA                | 14,500 |        | 14,500 |        | 14,500 |        | 14,500 | 14,500 |
| International Organization of Industr | 9,950  |        | 9,950  |        | 9,950  |        | 9,950  | 9,950  |
| Centre for the Study of Co-operative  | 54,532 |        | 54,532 |        | 54,532 |        | 54,532 | 54,532 |

Explanations of how community partner annual in-kind budget amounts were derived

#### Assumptions

Community partner representative (unless specifically indicated as manager) time worth \$500/day  
 Senior Manager time worth \$500/day  
 Mid-Manager time worth \$300/day  
 Administration time \$100/day

#### \$8,950/year model

|                                            |       |
|--------------------------------------------|-------|
| one 1/2 day meeting                        | 250   |
| one day-long meeting at a regional level   | 500   |
| one full day-long workshop                 | 500   |
| one day per month of senior manager's time | 6,000 |
| one day per month of administration time   | 1,200 |
| value of information and/or data           | 500   |

### Appendix 17: In-Kind Contributions

|                            |                                               |        |
|----------------------------|-----------------------------------------------|--------|
| <b>\$9,950/year model</b>  | Total                                         | 8,950  |
|                            | one 1/2 day meeting                           | 250    |
|                            | two one day-long meetings at a regional level | 500    |
|                            | one full day-long workshop                    | 500    |
|                            | one day per month of senior manager's time    | 6,000  |
|                            | one day per month of administration time      | 1,200  |
|                            | value of information and/or data              | 1,500  |
|                            | Total                                         | 9,950  |
| <b>\$12,500/year model</b> | two 1/2 day meetings                          | 500    |
|                            | two one day-long meetings at a regional level | 1,000  |
|                            | one full day-long workshop                    | 500    |
|                            | eight days per year of senior managers tim    | 4,000  |
|                            | ten days per year of mid-manager              | 3,000  |
|                            | one day per month of administration time      | 1,200  |
|                            | value of information and/or data              | 2,300  |
|                            | Total                                         | 12,500 |
| <b>\$14,500/year model</b> | one 1/2 day meeting                           | 250    |
|                            | two one day-long meetings at a regional level | 500    |
|                            | one full day-long workshop                    | 500    |
|                            | one day per month of senior manager's time    | 6,000  |
|                            | one day per month of administration time      | 1,200  |
|                            | value of information and/or data              | 6,050  |
|                            | Total                                         | 14,500 |
| <b>\$19,950/year model</b> | two 1/2 day meetings                          | 500    |
|                            | two one day-long meetings at a regional level | 1,000  |
|                            | one full day-long workshop                    | 500    |
|                            | 10 days per year of senior managers time      | 5,000  |
|                            | 12 days per year of mid-manager               | 3,600  |
|                            | one day per month of administration time      | 1,200  |
|                            | value of information and/or data              | 8,150  |
|                            | Total                                         | 19,950 |
| <b>\$24,700/year model</b> | two 1/2 day meetings                          | 500    |
|                            | two one day-long meetings at a regional level | 1,000  |
|                            | one full day-long workshop                    | 500    |
|                            | twelve days per year of senior managers ti    | 6,000  |
|                            | eighteen days per year of mid-manager         | 5,400  |
|                            | one day per month of administration time      | 1,200  |
|                            | value of information and/or data              | 10,100 |

## Appendix 17: In-Kind Contributions

|                                                  |                                                                                                                                                                                                                                                                                                                             |                                                                                                                     |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>\$24,950/year model</b>                       | <p>Total</p> <p>two 1/2 day meetings</p> <p>two one day-long meetings at a regional level</p> <p>one full day-long workshop</p> <p>10 days per year of senior managers time</p> <p>12 days per year of mid-manager</p> <p>one day per month of administration time</p> <p>value of information and/or data</p> <p>Total</p> | <p>24,700</p> <p>500</p> <p>1,000</p> <p>500</p> <p>5,000</p> <p>3,600</p> <p>1,200</p> <p>13,150</p> <p>24,950</p> |
| <b>University of Saskatchewan \$54,532 model</b> |                                                                                                                                                                                                                                                                                                                             |                                                                                                                     |
|                                                  | <p>0.5 FTE Project Coordinators</p> <p>0.1 FTE Web Design and Maintenance</p> <p>0.1 FTE Administrative assistance</p> <p>Office Space (2 @ 2000/month)</p> <p>Equipment (2 computers @ 100/month)</p> <p>Telephones (2 @ 25/month)</p> <p>Meeting Rooms (1 day/month @ 100)</p> <p>Total</p>                               | <p>34,125</p> <p>6,825</p> <p>4,582</p> <p>4,800</p> <p>2,400</p> <p>600</p> <p>1,200</p> <p>54,532</p>             |
| <b>University of Winnipeg \$13,633 model</b>     |                                                                                                                                                                                                                                                                                                                             |                                                                                                                     |
|                                                  | <p>estimated at 25% of University of Saskatchewan model above</p>                                                                                                                                                                                                                                                           | <p>13,633</p>                                                                                                       |

## Appendix 18: Allocation of Project Resources — Cluster

### Cluster-Driven Activities

|                             | <b>Soc Enterprise</b><br>Gayle Broad<br>April Bourgoise | <b>Financing</b><br>W. Wuttunee<br>Martin Chicilo | <b>Governance</b><br>M. Fulton<br>Quintin Fox | <b>Measurement</b><br>L. H. Ketilson<br>M. Beaudoin | <b>Policy</b><br>C. de Clercy<br>B. Reimer | <b>Totals</b>  |
|-----------------------------|---------------------------------------------------------|---------------------------------------------------|-----------------------------------------------|-----------------------------------------------------|--------------------------------------------|----------------|
| Scholarships                |                                                         |                                                   |                                               |                                                     |                                            |                |
| 3 PhD                       |                                                         | 1 x 15,000 x 3                                    |                                               | 1 x 15,000 x 3                                      | 1 x 15,000 x 3                             | 135,000        |
| 10 MA                       | 3 x 12,000 x 2                                          | 2 x 12,000 x 2                                    | 2 x 12,000 x 2                                | 1 x 12,000 x 2                                      | 2 x 12,000 x 2                             | 240,000        |
| Internships                 |                                                         |                                                   |                                               |                                                     |                                            |                |
| * 8 PhD                     |                                                         | 2                                                 | 2                                             | 2                                                   | 2                                          |                |
| Field research expenses     | 30,000                                                  | 30,000                                            | 30,000                                        | 30,000                                              | 30,000                                     | 150,000        |
| Unmatched release Allowance | 2 x 2,500                                               | 1 x 2,500                                         |                                               |                                                     |                                            | 7,500          |
| Release time stipend        | 1 x 2,400                                               |                                                   | 1 x 2,400                                     | 1 x 2,400                                           | 1 x 2,400                                  | 9,600          |
| Communications/supplies     | 1,000 x 5                                               | 1,000 x 5                                         |                                               |                                                     |                                            | 10,000         |
| <b>Total</b>                |                                                         |                                                   |                                               |                                                     |                                            | <b>552,100</b> |

\*Funds for internships flow through the provincial-level organizations

## Appendix 18: Allocation of Project Resources — Community

### Community-Driven Activities

|                                                          | Manitoba<br>WIRA | Northern Ont<br>CESD | Saskatchewan<br>CUISR | Total          |
|----------------------------------------------------------|------------------|----------------------|-----------------------|----------------|
| Internships                                              |                  |                      |                       |                |
| 22 Four month                                            | 8 x 5,000        | 8 x 5,000            | 6 x 5,000             | 110,000        |
| 8 PhD                                                    | 2 x 15,000       | 2 x 15,000           | 4 x 15,000            | 120,000        |
| 15 MA                                                    | 5 x 12,000       | 5 x 12,000           | 5 x 12,000            | 180,000        |
| 15 Undergrad                                             | 5 x 10,000       | 5 x 10,000           | 5 x 10,000            | 150,000        |
| Student conference travel                                | 2,000 x 5        | 2,000 x 5            | *                     | 20,000         |
| Travel to planning meetings                              | 3,300 x 2        | 3,300 x 2            | **                    | 13,200         |
| *Travel to regional conferences (centrally administered) |                  |                      |                       |                |
| 6 salary replacements                                    | 2 x 5,000 x 5    | 2 x 5,000 x 5        | 2 x 5,000 x 5         | 150,000        |
| Provincial-level workshops                               |                  |                      |                       |                |
| Travel                                                   | 2,000 x 5        | 2,000 x 5            | 2,000 x 5             | 30,000         |
| Expenses                                                 | 2,650 x 5        | 2,650 x 5            | 2,650 x 5             | 39,750         |
| Supplies                                                 | 1,000 x 5        | 1,000 x 5            | 1,000 x 5             | 15,000         |
| Admin., community liaison                                | 9,000 x 5        | 3,100 x 5            | 15,000 x 5            | 135,500        |
| Editor                                                   | 2,275 x 5        | 2,275 x 5            | 2,275 x 5             | 34,125         |
| <b>Total</b>                                             |                  |                      |                       | <b>953,450</b> |

### Centrally Administered

|                                                     |  |            |  |                |
|-----------------------------------------------------|--|------------|--|----------------|
| Travel                                              |  |            |  |                |
| *Students (for Sask only)                           |  | 2000 x 5   |  | 10,000         |
| Regional Conferences (yr. 1, 4)                     |  |            |  |                |
| Year 1                                              |  | 20,000     |  |                |
| Year 4                                              |  | 20,000     |  | 40,000         |
| **Planning meetings (for Sask only)                 |  |            |  |                |
| Year 2                                              |  | 3,300      |  |                |
| Year 4                                              |  | 3,300      |  | 6,600          |
| Dissemination of research — domestic, international |  |            |  | 32,200         |
| Four-month assistantships                           |  | 22 x 4,500 |  | 99,000         |
| Research funds                                      |  | 2,000 x 5  |  | 10,000         |
| Release time stipend                                |  | 5 x 2,400  |  | 12,000         |
| Unmatched release allowance                         |  | 2 x 2,500  |  | 5,000          |
| Conference hosting (yr. 1, 4)                       |  |            |  |                |
| Year 1                                              |  | 13,000     |  |                |
| Year 4                                              |  | 20,000     |  | 33,000         |
| Publications                                        |  | 5 x 5,000  |  | 25,000         |
| Teleconferences                                     |  | 5 x 5,000  |  | 25,000         |
| <b>Total</b>                                        |  |            |  | <b>297,800</b> |

## Appendix 18: Allocation of Project Resources — Consolidated

### Overall Annual Budget

#### **Cluster #1 Social Enterprise Development (Gayle Broad)**

|                          | Year 1       | Year 2        | Year 3        | Year 4        | Year 5        | <b>TOTAL</b>   |
|--------------------------|--------------|---------------|---------------|---------------|---------------|----------------|
| * Scholarships           |              |               |               |               |               |                |
| PhD                      |              |               |               |               |               |                |
| Masters                  |              | 12,000        | 24,000        | 24,000        | 12,000        | 72,000         |
| Field research expenses  | 6,000        | 6,000         | 6,000         | 6,000         | 6,000         | 30,000         |
| Unmatched release allow. | 2,500        |               |               |               | 2,500         | 5,000          |
| Comm & supplies          | 1,000        | 1,000         | 1,000         | 1,000         | 1,000         | 5,000          |
| <b>Total</b>             | <b>9,500</b> | <b>19,000</b> | <b>31,000</b> | <b>31,000</b> | <b>21,500</b> | <b>112,000</b> |

\* All scholarships have been awarded

#### **Cluster #2 Financing the Social Economy (Wanda Wuttunee)**

|                             | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | <b>TOTAL</b> |
|-----------------------------|--------|--------|--------|--------|--------|--------------|
| * Scholarships              |        |        |        |        |        |              |
| PhD                         |        | 15,000 | 15,000 | 15,000 |        | 45,000       |
| Masters                     |        | 12,000 | 12,000 | 12,000 | 12,000 | 48,000       |
| Field research expenses     | 6,000  | 6,000  | 6,000  | 6,000  | 6,000  | 30,000       |
| Unmatched release allowance | 2,500  |        |        |        |        | 2,500        |
| Comm & supplies             | 1,000  | 1,000  | 1,000  | 1,000  | 1,000  | 5,000        |

**Appendix 18: Allocation of Project Resources — Consolidated**

|              |             |              |               |               |               |               |
|--------------|-------------|--------------|---------------|---------------|---------------|---------------|
| <b>Total</b> | <b>9500</b> | <b>34000</b> | <b>34,000</b> | <b>34,000</b> | <b>19,000</b> | <b>130500</b> |
|--------------|-------------|--------------|---------------|---------------|---------------|---------------|

\* 1 PhD scholarship has been awarded

**Cluster #3 Governance (Brett Fairbairn)**

|                          | Year 1      | Year 2       | Year 3        | Year 4        | Year 5        | <b>TOTAL</b> |
|--------------------------|-------------|--------------|---------------|---------------|---------------|--------------|
| Scholarships             |             |              |               |               |               |              |
| PhD                      |             |              |               |               |               | 0            |
| Masters                  |             | 12,000       | 12,000        | 12,000        | 12,000        | 48000        |
| Field research expenses  | 6,000       | 6,000        | 6,000         | 6,000         | 6,000         | 30,000       |
| * Release time stipend   |             |              | 2,400         |               |               | 2,400        |
| Unmatched release allow. |             |              |               |               |               | 0            |
| Comm & supplies          |             |              |               |               |               | 0            |
| <b>Total</b>             | <b>6000</b> | <b>18000</b> | <b>20,400</b> | <b>18,000</b> | <b>18,000</b> | <b>80400</b> |

**Cluster #4 Measurement (Lou Hammond Ketilson)**

|                         | Year 1   | Year 2 | Year 3 | Year 4 | Year 5 | <b>TOTAL</b> |
|-------------------------|----------|--------|--------|--------|--------|--------------|
| ** Scholarships         |          |        |        |        |        |              |
| PhD                     |          | 15,000 | 15,000 | 15,000 |        | 45000        |
| Masters                 |          |        | 12,000 | 12,000 |        | 24000        |
| Field research expenses | 6,000 *0 |        | 6,000  | 6,000  | 6,000  | 24,000       |
| Release time stipend    | 2,400    | 2,400  | 2,400  | 2,400  | 2,400  | 12,000       |

### Appendix 18: Allocation of Project Resources — Consolidated

|                             |             |              |               |               |              |               |
|-----------------------------|-------------|--------------|---------------|---------------|--------------|---------------|
| Unmatched release allowance |             |              |               | 2,500         |              | 2,500         |
| Comm & supplies             |             |              |               |               |              | 0             |
| <b>Total</b>                | <b>8400</b> | <b>17400</b> | <b>35,400</b> | <b>37,900</b> | <b>8,400</b> | <b>107500</b> |

\* Funds sent to Algoma to support R. Bagaoui's work

\*\* Equivalent of one PhD remaining to award

#### Cluster #5 Policy (Cris de Clercy)

|                             | Year 1      | Year 2        | Year 3        | Year 4        | Year 5        | <b>TOTAL</b>  |
|-----------------------------|-------------|---------------|---------------|---------------|---------------|---------------|
| * Scholarships              |             |               |               |               |               |               |
| PhD                         |             | 15,000        | 15,000        | 15,000        |               | 45000         |
| Masters                     |             | 12,000        | 12,000        | 12,000        | 12,000        | 48000         |
| Field research expenses     | 6,000       | 6,000         | 6,000         | 6,000         | 6,000         | 30,000        |
| Release time stipend        |             |               | 2,400         |               |               | 2,400         |
| Unmatched release allowance |             |               |               |               |               | 0             |
| Comm & supplies             |             |               |               |               |               | 0             |
| <b>Total</b>                | <b>6000</b> | <b>33,000</b> | <b>35,400</b> | <b>33,000</b> | <b>18,000</b> | <b>125400</b> |

\* All scholarships have been awarded

## Appendix 18: Allocation of Project Resources — Consolidated

| <b>Manitoba WIRA</b>        |               | Year 1        | Year 2        | Year 3        | Year 4        | Year 5        | <b>Total</b>   |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Internships                 | 8 x 4 month   | 5,000         | 5,000         | 10,000        | 10,000        | 10,000        | 40,000         |
|                             | 2 x PhD       |               | 15,000        | 15,000        |               |               | 30,000         |
|                             | 5 x MA        | 12,000        | 12,000        | 12,000        | 12,000        | 12,000        | 60,000         |
|                             | 5 x Undergrad | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Student conference travel   |               | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |
| Travel to planning meetings |               |               | 3,300         | 3,300         |               |               | 6,600          |
| Salary replacement          |               | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Provincial-level workshops  |               |               |               |               |               |               |                |
|                             | Travel        | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |
|                             | Expenses      | 2,650         | 2,650         | 2,650         | 2,650         | 2,650         | 13,250         |
| Supplies                    |               | 1,000         | 1,000         | 1,000         | 1,000         | 1,000         | 5,000          |
| Admin., community liaison   |               | 9,000         | 9,000         | 9,000         | 9,000         | 9,000         | 45,000         |
| <b>Total</b>                |               | <b>53,650</b> | <b>71,950</b> | <b>76,950</b> | <b>58,650</b> | <b>58,650</b> | <b>319,850</b> |

## Appendix 18: Allocation of Project Resources — Consolidated

### Northern Ontario CESD

|                                   | Year 1        | Year 2        | Year 3        | Year 4        | Year 5        | Total          |
|-----------------------------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Internships                       |               |               |               |               |               |                |
| 8 x 4 month                       | 5,000         | 5,000         | 10,000        | 10,000        | 10,000        | 40,000         |
| 2 x PhD                           |               | 15,000        |               | 15,000        |               | 30,000         |
| 5 x MA                            | 12,000        | 12,000        | 12,000        | 12,000        | 12,000        | 60,000         |
| 5 x Undergrad                     | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Student conference travel         | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |
| Travel to planning meetings       |               | 3,300         | 3,300         |               |               | 6,600          |
| Salary replacement                | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Provincial-level workshops        |               |               |               |               |               |                |
| Travel                            | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |
| Expenses                          | 2,650         | 2,650         | 2,650         | 2,650         | 2,650         | 13,250         |
| Supplies                          | 1,000         | 1,000         | 1,000         | 1,000         | 1,000         | 5,000          |
| Admin., community liaison         | 3,100         | 3,100         | 3,100         | 3,100         | 3,100         | 15,500         |
| * Funds for R. Bagaoui's research |               | 6,000         |               |               |               | 6,000          |
| <b>Total</b>                      | <b>47,750</b> | <b>72,050</b> | <b>56,050</b> | <b>67,750</b> | <b>52,750</b> | <b>296,350</b> |

## Appendix 18: Allocation of Project Resources — Consolidated

### Saskatchewan CUISR

|                                     |                           | Year 1        | Year 2        | Year 3        | Year 4        | Year 5        | Total          |
|-------------------------------------|---------------------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Internships                         |                           |               |               |               |               |               |                |
|                                     | 6 x 4 month               | 10,000        |               | 10,000        |               | 10,000        | 30,000         |
|                                     | 2 x PhD                   | 15,000        | 15,000        | 15,000        | 15,000        |               | 60,000         |
|                                     | 5 x MA                    | 12,000        | 12,000        | 12,000        | 12,000        | 12,000        | 60,000         |
|                                     | 5 x Undergrad             | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Travel to planning meetings         |                           |               |               |               |               |               | 0              |
| Salary replacement                  |                           | 10,000        | 10,000        | 10,000        | 10,000        | 10,000        | 50,000         |
| Provincial-level workshops          |                           |               |               |               |               |               |                |
|                                     | Travel                    | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |
|                                     | Expenses                  | 2,650         | 2,650         | 2,650         | 2,650         | 2,650         | 13,250         |
| Supplies                            |                           | 1,000         | 1,000         | 1,000         | 1,000         | 1,000         | 5,000          |
| Admin., community liaison           |                           | 15,000        | 15,000        | 15,000        | 15,000        | 15,000        | 75,000         |
| <b>Total</b>                        |                           | <b>77,650</b> | <b>67,650</b> | <b>77,650</b> | <b>67,650</b> | <b>62,650</b> | <b>353,250</b> |
| <b>Centrally Administered Funds</b> |                           |               |               |               |               |               |                |
|                                     |                           | Year 1        | Year 2        | Year 3        | Year 4        | Year 5        | Total          |
| Travel                              |                           |               |               |               |               |               |                |
|                                     | Student conference travel | 2,000         | 2,000         | 2,000         | 2,000         | 2,000         | 10,000         |

### Appendix 18: Allocation of Project Resources — Consolidated

|                                  |                |                |                |                |                |                  |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|------------------|
| Regional symposia                | 20,000         |                |                | 20,000         |                | 40000            |
| Planning meetings (Sask only)    | 8,000          | 3,300          | 8,425          | 3,300          | 8,000          | 31025            |
| Dissemination of research        |                | 6,000          | 8,000          | 8,000          | 10,200         | 32200            |
| Student stipends                 |                | 10,000         | 35,000         | 40,000         | 14,000         | 99000            |
| Research expenses                |                | 2,000          | 6,000          | 2,000          |                | 10000            |
| Release time stipends            | 2,400          | 2,400          | 2,400          | 2,400          | 2,400          | 12000            |
| Unmatched release allowance      |                |                | 2,500          | 2,500          |                | 5000             |
| Conference hosting               | 13,000         |                |                | 20,000         |                | 33000            |
| Publications                     | 5,000          | 5,000          | 5,000          | 5,000          | 5,000          | 25000            |
| Teleconferences                  | 5,000          | 5,000          | 5,000          | 5,000          | 5,000          | 25000            |
| <b>Total</b>                     | <b>55,400</b>  | <b>35,700</b>  | <b>74,325</b>  | <b>110,200</b> | <b>46,600</b>  | <b>322,225</b>   |
| <br>                             |                |                |                |                |                |                  |
| <b>Combined annual total</b>     | <b>273,850</b> | <b>368,750</b> | <b>441,175</b> | <b>458,150</b> | <b>305,550</b> | <b>1,847,475</b> |
|                                  | Year 1         | Year 2         | Year 3         | Year 4         | Year 5         | <b>Total</b>     |
| <b>Funds received from SSHRC</b> | 349,275        | 349,575        | 349,075        | 349,775        | 349,775        | 1,747,475        |
|                                  | Year 1         | Year 2         | Year 3         | Year 4         | Year 5         | <b>Total</b>     |
| <b>Office of VP Research</b>     | 20,000         | 20,000         | 20,000         | 20,000         | 20,000         | <b>100000</b>    |

# CO-OPERATIVE INNOVATION

## INFLUENCING THE SOCIAL ECONOMY



**2007 ANNUAL MEETING**  
Association of Cooperative Educators  
Canadian Association for Studies in Co-operation  
L'Association Canadienne pour les Études sur la Coopération  
International Co-operative Alliance Research Committee



**ORGANIZED BY**  
Centre for the Study of Co-operatives  
University of Saskatchewan  
Saskatoon, SK



**28 MAY – 1 JUNE 2007**  
**UNIVERSITY OF SASKATCHEWAN**

## WELCOME

On behalf of the Canadian Association for Studies in Co-operation (CASC), the Association of Co-operative Educators (ACE), and the International Co-operative Alliance (ICA) Research Forum, I wish to welcome you to Saskatoon and to the University of Saskatchewan. The Centre for the Study of Co-operatives feels privileged to co-ordinate the joint gathering of these important organizations and we are proud to be able to showcase our university campus, our city, and our province.

***Co-operative Innovation: Influencing the Social Economy*** is the first time that these groups have collaborated on a joint event. The planning committee represented by each organization has attempted to prepare a program of sessions and events that capture the richness and potential of co-operatives as innovators and how that has an effect on the larger social economy. The committee wanted this to be an international event while maintaining a Saskatchewan flavour. You will experience presentations by co-operators from around the world, but also experience first hand how some local organizations are working with their members to improve the quality of life in their communities. While most presentations will occur on the university campus, it was important to have delegates also see the various communities they will hear about. Select events, therefore, will happen in and be hosted by those communities.

This is an important year for the University of Saskatchewan; 2007 is our university's hundredth birthday. As part of the centennial celebrations, the U of S is hosting Congress 2007 and our conference is a part of that larger event. In addition to our small group of delegates, approximately five thousand social science and humanities scholars and researchers are also gathered at the U of S this week, holding about seventy conferences that parallel our own. Congress 2007 is hosting select events and functions available to all Congress delegates and I encourage you to explore your Congress program for opportunities in which you may choose to participate.

I sincerely hope that your visit to our conference is rewarding and memorable. Please take the time to discover the beauty of the university campus, our amazing city, and our province, which is consistently rated as one of the best places in the world to live.

Lou Hammond Ketilson, Director  
Centre for the Study of Co-operatives  
University of Saskatchewan

## SPONSORS OF THIS EVENT

UNIVERSITY OF SASKATCHEWAN

CANADIAN ASSOCIATION FOR STUDIES IN CO-OPERATION (CASC)

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SOCIAL SCIENCES AND HUMANITIES RESEARCH COUNCIL

CANADIAN INTERNATIONAL DEVELOPMENT AGENCY

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THE CO-OPERATORS

TWIN CITY CO-OPS FEDERAL CREDIT UNION

BRITISH COLUMBIA INSTITUTE FOR CO-OPERATIVE STUDIES

THE CENTRE FOR THE STUDY OF CO-OPERATIVES

## PROGRAM AT A GLANCE

| <b>MONDAY, MAY 28</b> |                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 am – 7:00 pm     | <p><b>Suggestions for the Day</b></p> <p>Congress 2007, Registration<br/>Physical Activity Complex (PAC)<br/>University of Saskatchewan</p> <p>Visit Congress Book Fair</p> <p>Tour University of Saskatchewan</p> <p>Tour Saskatoon</p> <p><b>IMPORTANT NOTE</b><br/>Delegates are on their own until the evening reception;<br/>no formal plans have been arranged.</p> |
| 7:00 pm – 10:00 pm    | <p><b>Welcome and Opening Reception</b></p> <ul style="list-style-type: none"><li>• Greetings from conference hosts</li><li>• Greetings from SSHRC</li><li>• Cocktails (cash bar)</li><li>• Generous appetizers will be served</li></ul> <p><b>Location: Agriculture Building Atrium</b><br/><b>51 Campus Drive</b></p>                                                   |

## TUESDAY, MAY 29

### CONGRESS 2007 WOMEN'S THEME DAY

|               |                                                                                                                                                                                  |                                                |                                                |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|------------------------------------------------|
| 8:30 – 8:45   | Researching the Social Economy and Social Cohesion<br><i>Chad Gaffield, President</i><br><i>Social Sciences and Humanities Research Council (SSHRC)</i><br><b>Room: ARTS 241</b> |                                                |                                                |
| 8:45 – 9:30   | Co-operative Innovation: Influencing the Social Economy<br><i>Brett Fairbairn, Professor and Head</i><br><i>U of S Department of History</i><br><b>Room: ARTS 241</b>            |                                                |                                                |
| 9:30 – 10:30  | Concurrent Session 1A<br><b>Room: ARTS 214</b>                                                                                                                                   | Concurrent Session 1B<br><b>Room: ARTS 217</b> | Concurrent Session 1C<br><b>Room: ARTS 241</b> |
| 10:30 – 11:00 | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                          |                                                |                                                |
| 11:00 – 12:00 | Concurrent Session 2A<br><b>Room: ARTS 214</b>                                                                                                                                   | Concurrent Session 2B<br><b>Room: ARTS 217</b> | Concurrent Session 2C<br><b>Room: ARTS 241</b> |
| 12:00 – 1:30  | <b>LUNCH AND CASC ANNUAL GENERAL MEETING</b><br><b>Room ARTS 241</b>                                                                                                             |                                                |                                                |
| 1:30 – 2:15   | Invited Speaker (to be confirmed)<br><b>Room: ARTS 241</b>                                                                                                                       |                                                |                                                |
| 2:15 – 3:15   | Concurrent Session 3A<br><b>Room: ARTS 214</b>                                                                                                                                   | Concurrent Session 3B<br><b>Room: ARTS 217</b> | Concurrent Session 3C<br><b>Room: ARTS 241</b> |
| 3:15 – 3:45   | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                          |                                                |                                                |
| 3:45 – 4:45   | Concurrent Session 4A<br><b>Room: ARTS 214</b>                                                                                                                                   | Concurrent Session 4B<br><b>Room ARTS 217</b>  | Concurrent Session 4C<br><b>Room: ARTS 263</b> |
| 4:45 – 5:45   | Concurrent Session 5A<br><b>Room: ARTS 214</b>                                                                                                                                   | Concurrent Session 5B<br><b>Room ARTS 217</b>  | Concurrent Session 5C<br><b>Room: ARTS 263</b> |
| 5:45 –        | <b>FREE TIME</b><br><b>DINNER ON YOUR OWN</b>                                                                                                                                    |                                                |                                                |

## WEDNESDAY, MAY 30

### CONGRESS 2007 ABORIGINAL PEOPLES' THEME DAY

|               |                                                                                                                                                                          |                                                       |                                                       |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------|
| 8:30 – 9:30   | <b>Argentinean Work Co-operatives</b><br><i>Sergio Ballario</i><br><i>Ministry of Co-operatives, Province of Santa Fe, Argentina</i><br><b>Room: ARTS 241</b>            |                                                       |                                                       |
| 9:30 – 10:30  | <b>Concurrent Session 6A</b><br><b>Room: ARTS 214</b>                                                                                                                    | <b>Concurrent Session 6B</b><br><b>Room: ARTS 217</b> | <b>Concurrent Session 6C</b><br><b>Room: ARTS 241</b> |
| 10:30 – 11:00 | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                  |                                                       |                                                       |
| 11:00 – 12:00 | <b>Concurrent session 7A</b><br><b>Room: ARTS 214</b>                                                                                                                    | <b>Concurrent Session 7B</b><br><b>Room: ARTS 217</b> | <b>Concurrent Session 7C</b><br><b>Room: ARTS 241</b> |
| 12:00 – 1:30  | <b>LUNCH AND ICA RESEARCH FORUM ANNUAL GENERAL MEETING</b><br><b>Room ARTS 241</b>                                                                                       |                                                       |                                                       |
| 1:30 – 2:15   | <b>Innovation at Concentra Financial</b><br><i>David Smith</i><br><i>Senior Vice-President and Chief Marketing Officer, Concentra Financial</i><br><b>Room: ARTS 241</b> |                                                       |                                                       |
| 2:15 – 3:15   | <b>Concurrent Session 8A</b><br><b>Room: ARTS 214</b>                                                                                                                    | <b>Concurrent Session 8B</b><br><b>Room: ARTS 217</b> | <b>Concurrent Session 8C</b><br><b>Room: ARTS 241</b> |
| 3:15 – 3:45   | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                  |                                                       |                                                       |
| 3:45 – 4:45   | <b>Concurrent Session 9A</b><br><b>Room: ARTS 214</b>                                                                                                                    | <b>Concurrent Session 9B</b><br><b>Room ARTS 217</b>  | <b>Concurrent Session 9C</b><br><b>Room: ARTS 241</b> |
| 4:45– 5:45    | <b>Conc. Session 10A</b><br><b>Room: ARTS 214</b>                                                                                                                        | <b>Conc. Session 10B</b><br><b>Room ARTS 217</b>      | <b>Conc. Session 10C</b><br><b>Room: ARTS 241</b>     |
| 5:45 – 6:00   | <b>SHORT WALK TO FACULTY CLUB</b>                                                                                                                                        |                                                       |                                                       |
| 6:00 – 7:00   | <b>ACE RECEPTION AND ANNUAL GENERAL MEETING</b><br><b>Location: U of S Faculty Club</b>                                                                                  |                                                       |                                                       |
| 7:00 – 9:00   | <b>ACE BANQUET AND AWARDS CEREMONY</b><br><b>Faculty Club</b>                                                                                                            |                                                       |                                                       |

| <b>THURSDAY, MAY 31</b>                       |                                                                                                                                                                                                                                          |                                                     |                                                     |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------|
| <b>CONGRESS 2007 SOCIAL ECONOMY THEME DAY</b> |                                                                                                                                                                                                                                          |                                                     |                                                     |
| 8:30 – 9:30                                   | <p>The More We Get Together – The Happier We'll Be<br/> <i>John Helliwell</i><br/> <i>Professor Emeritus of Economics, University of British Columbia</i></p> <p><b>Room: ARTS 241</b></p>                                               |                                                     |                                                     |
| 9:30 – 10:30                                  | <p>Quebec's Social Economy<br/> <i>Nancy Neamtan</i><br/> <i>President, Chantier de l'économie sociale</i></p> <p><b>Room: ARTS 241</b></p>                                                                                              |                                                     |                                                     |
| 10:30 – 11:00                                 | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                                                                                  |                                                     |                                                     |
| 11:00 – 12:00                                 | <p>Social Economy Sector Panel<br/> <i>Donna Heimbecker, Saskatchewan Native Theatre Company</i><br/> <i>Flo Frank, Common Ground Resource Group</i><br/> <i>Susan Beitlich, Wisconsin Farmers Union</i></p> <p><b>Room ARTS 241</b></p> |                                                     |                                                     |
| 12:00 – 1:30                                  | <b>LUNCH ON YOUR OWN<br/>OPPORTUNITY TO VISIT BOOK FAIR</b>                                                                                                                                                                              |                                                     |                                                     |
| 1:30 – 2:30                                   | <p>Conc. Session 11A<br/> <b>Room: ARTS 214</b></p>                                                                                                                                                                                      | <p>Conc. Session 11B<br/> <b>Room: ARTS 217</b></p> | <p>Conc. Session 11C<br/> <b>Room: ARTS 241</b></p> |
| 2:30 – 3:30                                   | <p>Conc. Session 12A<br/> <b>Room: ARTS 214</b></p>                                                                                                                                                                                      | <p>Conc. Session 12B<br/> <b>Room: ARTS 217</b></p> | <p>Conc. Session 12C<br/> <b>Room: ARTS 241</b></p> |
| 3:30 – 4:00                                   | <b>REFRESHMENT AND NETWORKING BREAK</b>                                                                                                                                                                                                  |                                                     |                                                     |
| 4:00 – 5:00                                   | <p>Conc. Session 13A<br/> <b>Room: ARTS 214</b></p>                                                                                                                                                                                      | <p>Conc. Session 13B<br/> <b>Room ARTS 217</b></p>  | <p>Conc. Session 13C<br/> <b>Room: ARTS 241</b></p> |
| 5:00 – 5:30                                   | <p>Co-operative Innovation: Influencing the Social Economy (Revisited)<br/> <i>William Nelson</i><br/> <i>President, CHS Foundation, St. Paul</i></p> <p><b>Room: ARTS 241</b></p>                                                       |                                                     |                                                     |
| 5:30 – 6:30                                   | <b>FREE TIME — MUICK DINNER ON YOUR OWN</b>                                                                                                                                                                                              |                                                     |                                                     |
| 6:30                                          | <b>BUSES LEAVE U OF S FOR SASKATCHEWAN NATIVE THEATRE COMPANY<br/>PLACE RIEL BUS TERMINAL</b>                                                                                                                                            |                                                     |                                                     |
| 6:45 – 9:15                                   | <p>Are We There Yet?<br/> <i>Saskatchewan Native Theatre Company</i></p> <p><b>Saskatoon Indian &amp; Métis Friendship Centre, 168 Wall Street</b></p>                                                                                   |                                                     |                                                     |

**FRIDAY, JUNE 1**

**CO-OP AND SOCIAL ECONOMY SITE TOURS**

|                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                      |
|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>10:00 – 4:30<br/>Buses leave the university at 10:00 sharp</p> | <p><b>URBAN TOUR</b><br/>(Weather permitting – This will be in part a short walking tour)</p> <p>Riversdale Business Improvement District</p> <p>River Landing Development</p> <p>Saskatoon Farmers’ Market</p> <p>Saskatchewan Native Theatre Company</p> <p>White Buffalo Youth Lodge</p> <p>Core Neighborhood Youth Co-op</p> <p>Station 20 West</p> <p>QUINT Development Corporation</p> <p>Child Hunger Education Program</p> <p>West Side Community Clinic</p> | <p><b>RURAL TOUR</b></p> <p>Lake Lenore Co-operative Association</p> <p>Melfort Co-operative Association</p> <p>Naicam and Spalding Co-operative Associations</p> <p>Hammond Ketilson Grain Farm</p> |
| <p>4:30 – 12:00</p>                                               | <p align="center"><b>RURAL HOSPITALITY EVENING</b><br/>(food, activities, and entertainment provided)</p> <p align="center"><b>Location: Meacham, Saskatchewan</b><br/>(Buses will leave from Meacham at 10:00 pm and 11:00 pm and arrive back in Saskatoon at 11:00 pm and 12:00 am respectively)</p>                                                                                                                                                               |                                                                                                                                                                                                      |

## Appendix 20: Graduate Student Workshop Agenda

### **Building Respectful Relationships: Conducting Community-Based Research** Workshop for Graduate Students Studying the Social Economy

Monday May 28th 8:00 AM to 4:30 PM — Arts 217

8:00 Continental Breakfast

8:30 Welcome, introductions

9:00 *Building Respectful Relations*

Dr. Brett Fairbairn, Head, Department of History, Centre for the Study of Co-operatives  
Fellow in Co-operative Thought and Ideas

10:00 Refreshment Break

10:15 *Starting Out – Primer Regarding Community-Based Research*

Dr. Michael Gertler, Department of Sociology and Centre for the Study of Co-operatives  
Fellow in Community and Co-operative Development

Dr. Paul Wilkinson, Manager, Station 20 West; community partner, *Linking, Learning, Leveraging*

11:30 Lunch

12:30 *Matching Purpose, Participants and Methods:  
Conducting Research in Aboriginal Communities*

Dr. Wanda Wuttunee, Head, Department of Native Studies, University of Manitoba, and  
co-lead of Finance Research Cluster, *Linking, Learning, Leveraging*

Lois Gray, Graduate Student, University of Manitoba

1:45 *Making Sense of It All and Whose “Sense”:  
Innovative Data Collection Methods and Forms*

Dr. Jorge Sousa, Department of Educational Policy Studies, University of Alberta  
Len Usiskin, Manager, Quint Development Corporation; community partner, *Linking, Learning, Leveraging*

3:00 Refreshment Break

3:15 *Building a Graduate Student Network*

Dr. Ian MacPherson, Director, B.C. Institute for Co-operative Studies, Victoria; Co-  
director, Social Economy National Hub

Janelle Smith, Co-ordinator, Social Economy Graduate Student Network

4:30 Wrap up

5:00 Congress Registration, CASC/ACE/ICA Opening Reception

## Regional Partner Organizations



UNIVERSITY OF  
SASKATCHEWAN

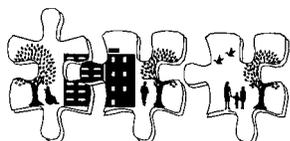
Centre for the Study  
of Co-operatives



Community-University Institute  
for Social Research



Community Economic and Social Development Unit  
Algoma University College



Winnipeg Inner-City Research Alliance

## Project Funding



Social Sciences and Humanities  
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