

POLICY THREADS REPORT

Social Economy and Sustainability Research Network Project 1.7 Policy Threads Inventory and Analysis Martha MacDonald and Graeme Reniers July 2011

• INTRODUCTION

• *The policy threads project*

This report summarizes the findings of the ‘Policy Threads’ project, initiated in the summer of 2009 as part of the Social Economy and Sustainability (SES) Research Network. This project grew out of discussions in subnode 1 regarding a follow-up to the policy scan (1.6). It was decided to pull together the policy-relevant findings of the research already conducted across the subnodes. A proposal was approved to hire a graduate student to complete an inventory of policy-related work “with the aim of pulling-out, summarizing and thematically organizing/analyzing the policy findings, implications or recommendations found in these projects.” The methodology included a documentary analysis of all projects based on project proposals, reports and papers. Phone interviews were also conducted with some project researchers and subnode coordinators to clarify the policy issues and implications and to invite further elaboration. In addition to this report, the project produced an inventory that summarizes the policy aspects of each project, a bibliography (attached) and a searchable database.

• *Conceptualization of policy*

Policy is interpreted very broadly in this report, hence the use of the term ‘policy threads’. Social economy organizations engage and interact with policy in many ways. They are regulated and constrained by policies that affect their day-to-day operation and long run direction. Many act as advocates in the policy realm on behalf of particular groups, communities or sectors. Others are involved in the delivery or implementation of policy, as service providers, or what Vaillancourt (2009) refers to as ‘co-production’ of policy. Along with grappling policies from various levels of government (municipal, provincial and federal), organizations engage with different departments at any one level and cross-departmental initiatives such as rural secretariats. In addition to sometimes interacting with different levels of governments simultaneously, social economy organizations also engage with different actors on the government side, including bureaucrats and politicians. Furthermore, most organizations are also confronted with various internal policy issues.

Layered onto this are many types of social economy organizations, ranging from a great variety of community organizations (including advocacy groups and service organizations), to social enterprises selling goods and services in the market (using a variety of organizational forms, including cooperative and not-for-profit). The initiatives of service organizations have been grouped by Loxley and Simpson into ‘gap filling’ and ‘transformative’, depending on whether they aim to ameliorate conditions of capitalism or more fundamentally challenge the system – either working in the spaces left by the public sector and the market or seeking to replace them (Loxley and Simpson 2007: 6).

Community organizations are also sometimes categorized by their charitable status or emphasis on volunteers. There are also different levels in the social economy, including umbrella groups that represent the interests of various SE organizations, whether it be a cooperative federation, or a network of community organizations.

- ***Construction of policy as well as implementation (production)***

Following Vaillancourt (2009) and others, we emphasize both the construction and production of policy. The former concerns the policy process and the ways the social economy participates in this process. Do they play a reactive role, or are there mechanisms for their participation in the design of policy? To what extent do we find co-construction of policy? What barriers and challenges do social economy groups face in this process? Are there success stories and what can we learn from them?

The social economy is very involved in the implementation of policy, or co-production. This is a traditional role of many organizations, especially in the area of health and social services (for example children's aid societies, hospitals, the Canadian Red Cross, immigrant services). However in recent years more programs and services have devolved to the social economy, through attempts to downsize the public sector. Thus many organizations deliver policy/programs essentially contracted out by government (employment counseling, for example). Others deliver policy by successfully advocating for certain service gaps to be filled (transition houses). What are the challenges in implementing policy and delivering services, in these various contexts? Is it a partnership in the way that Vaillancourt (2009) outlines in his model of democratic co-construction?

- **ROLE OF SE IN ADVOCATING POLICY**

Many of the SES projects concern social economy organizations that are very active in advocating for policy changes or initiatives.

- ***Examples of specific policy interventions***

In some cases very specific policies are focused on. For example, the PEI Women's Network has taken a national leadership role in advocating for changes to EI Maternity and Parental Benefits (2.4). They have identified very specific problems with the program parameters and have worked to publicize these and lobby for changes. Another example is the work of the Women for Environmental Sustainability organization in trying to get specific changes to fisheries policies to restrict the access of seiners to the local resource (2.5).

- ***Examples of particular sectors, areas or groups represented***

In other cases the organizations focus more broadly on policy areas of concern, representing the interests of a sector (or groups within a sector), a geographic area, or a particular demographic group. These are not mutually exclusive categories. In several cases one organization may advocate on behalf of a group, a sector and a geographic area – for example, the PEI Women for Environmental Sustainability organization (2.5) advocates for a voice at the fisheries management table for women, resource sustainability, and on behalf of the local community. Similarly, several subnode 4

projects concern groups working to promote environmental and community sustainability. Initiatives are often cross-cutting across government departments and/or levels of government.

- **Advocating on behalf of marginalized groups.**

There are many examples of organizations promoting the interests and needs of particular demographic groups, often those that are marginalized in some way. Examples include youth in suburban Charlottetown (2.3), new immigrants (S.2 2.11, S.10), victims of domestic violence (2.14, S.3), disabled students (2.10), and indigenous groups (2.7). Research draws attention to the problems with current programs/policies and provides recommendation for changes.

Other organizations focus their work more on behalf of a sector, or a group within that sector that is marginalized in terms of economic power or policy leverage. For example, 4.2 looks at the challenges woodlot owners face trying to influence forestry management policy; 4.3 focuses on a cooperative of small farmers working for supportive policies promoting local produce; 4.4 researches the efforts of an aquaculture association to influence regulatory policy in their sector; 2.5 documents the efforts of women, 'small' fishers and local communities to influence fisheries management policies; 2.8 looks at the policy needs and initiatives of PEI organic farmers. In each of these cases the group is competing with large private interests who have a lot of influence on policy in the sector.

Some projects document efforts to advocate on behalf of communities – including broadly defined communities, as in the Coastal Community Network (1.3) and specific municipalities, as in the study of various types of small municipalities in northern New Brunswick (4.5, 1.5), and indigenous communities (2.7 b, 4.6, 4.7). Communities, as well as sectors and specific demographic groups can be marginalized and vulnerable.

- **Advocating on behalf of the SE**

Many projects are involved with advocacy work promoting the SE and its needs to policy makers. A key project in this regard is 2.6, Mapping Supports for the Social Economy, which critically examined the federal and provincial funding and policy supports for SE organizations and advocated for changes that would enable SE organizations to function more effectively. Other projects demonstrate the value of the SE. For example, the Survey of Cooperatives and Credit Unions (1.1) showed the contributions these organizations make to local communities, their involvement in public education and in the policy process, and the use of multiple bottom lines. S.4 hones in more particularly on the extent, and need for, advocacy by cooperatives in New Brunswick. She documents a two-tiered system of policy support to business, to the disadvantage of cooperatives compared to private sector firms. S. 10 highlights the way the home care policy framework disadvantages the SEOs providing service in remote areas. Several subnode 4 projects concern promoting the value and specific needs of the social economy.

- **Having a say in development**

There are several examples of SE organizations working to shape development in their communities or sectors. Developing community accounts (2.2) helps identify and

promote the kind of values people want to guide development, and the kind of communities they want to live in. The goal is not just to bring development to areas that are struggling – i.e. fill in for absent private capital – though sometimes SE are seen as a means to fix what is broken, or operate around the margins of the private sector. There is also a desire to do development with different values – the values of social and economic justice and environmental sustainability. This is demonstrated in several projects across subnodes that focus in some way on domestic fair trade, whether through the entry point of food security for children (3.1, S.5), or through promoting markets for small scale producers (4.3). They advocate policies that provide infrastructure to support buying local, and that challenge policies that privilege large scale agribusiness (4.8). The Coastal Community Network (1.3) has worked for many years, struggling grant to grant, promoting policy that would benefit rural areas. In New Brunswick SE groups have a long history of leadership in rural and community development.

- **Capacity building**

Much of the advocacy focus of the SE groups studied through the SES is on capacity building in some form. The SE is fundamentally a social movement that mobilizes ideas and resources to work towards common goals. Every initiative reviewed in the SES is in some way focused on capacity building at some level. Networking is an important part of this, as is attracting, developing and retaining leadership (4.7, S.13). Project 4.1 examined the challenges faced in different types of municipal areas in building capacity to respond to climate change. Although the SES projects did not include arts and culture organizations, these too play an important role in capacity building for the relevant groups, sectors and areas. The SE builds communities, not just livelihoods.

- **Partnering**

A common theme that runs through the SES projects is that SE organizations advocate not only on their own behalf, but form partnerships based on common interest. These partnerships include working with small business as well as other SE groups. The watershed groups, for example (4.1) work with the firms providing septic services. The aquaculture association in New Brunswick (4.4) works with private producers to promote acceptance of aquaculture and mediate with other interests (cottagers, other fishers...). Similarly, the Woodlot Owners Association promotes the interests of small operators in an industry dominated by large companies (4.2). Partnerships with government are also of crucial concern. As noted, most SE groups advocate some form of co-construction of policy. It is here that the most frustration seems to exist.

- ***Issues/Challenges***

Advocacy groups face many common challenges, of which accessing funding is of prime concern (2.6). Groups are limited by endless rounds of project funding, effectively taking enormous energy away from the main work of the organizations. Organizations scramble to patch together funding from a variety of agencies, with different priorities and terms of reference. These funding constraints stymie long term planning and also make it difficult to attract and retain good people (4.1). To ameliorate this situation, organizations require multi-year core funding.

Furthermore, organizations face challenges working across levels of government to patch together funds – finding matching funds, for example, where one level of government may be onside, but not the other (1.3, Romanow and Munro 2008). Organizations are also vulnerable to changing funding priorities, as governments change and the political winds shift.

Some funding has restrictions regarding explicit ‘advocacy’ work. Advocacy can put funding in jeopardy, especially for those groups funded to deliver programs. Funding for advocacy work per se is not generally available, while private sector organizations have ample resources to support their lobbying efforts. The PEI Women’s Network used project funding to research the availability of EI parental benefits to the group of women they serve (2.4); however when they had developed expertise and were in a position to lobby the government for changes to the program there was no funding available to carry this effort forward. The Coastal Communities Network is so frustrated by the challenges of chasing project funding that they are looking for ways to become self-supporting through social enterprise initiatives (1.3).

Organizations also often find their broad interests out of synch with government silos. For example, environmental groups intersect with agriculture, forestry, fishing and tourism interests. Ministerial sectoral silos make it difficult for those working on a territorial basis, as are many of the local groups interested in community development and environmental sustainability (see for example 4.4, working on promoting aquaculture, and 1.3 working on a range of coastal community issues). This multi-stakeholder approach requires different institutional structures and spaces at the policy level (Neamtan 2009). Examples in NS include the Ministerial Portfolio for Volunteerism and the Poverty Reduction Working Group and the Nova Scotia Volunteer Advisory Council (Myers 2009). It should also be noted that silos can exist on the SE side.

An essential, and challenging, way for advocacy groups to be effective is through building partnerships. Policy advocates tread a fine line between lobbying from ‘outside’ and working with sympathetic ‘insiders’. Many feel they are not invited to the table where key policy decisions are made – the definition of stakeholders in particular often excludes broader community groups, as was discovered by the Women for Environmental Sustainability group in PEI (2.5), and the watershed groups in New Brunswick (4.1). Relationships can be good at one level but not another. There were many permutations of this in the projects. In some cases a good relationship existed with funding program staff, who were themselves powerless to influence funding policy decisions on a macro level (2.6). Others felt blocked by a particular individual in the policy chain. A study of PEI social economy organizations found relationships were generally more stable and positive with provincial funders (2.6, Groome Wynne 2008).

- ***Lessons learned***

- In many projects the ability to work effectively depended on individual leaders. This is true not only on the side of the SE organizations, but also within the government. Committed individuals make a difference.
- The need to minimize silos. Institutional structures that cut across silos are needed to promote the holistic approach of many SE initiatives. This facilitates communication, funding and evaluation.

- The importance of networking. Multi-stakeholder approaches, partnerships and capacity building at all levels are crucial and provide a base to institutionalize co-construction of policy. Project 1.4 compared watershed groups Ontario, NB and Quebec and found that those that were most successful had the capacity to network – with both government and private enterprises – to influence policy. Project 4.5 found the need for a critical mass of people in order to have a voice and be able to bargain with government on issues such as responses to climate change. This is difficult in vulnerable local municipalities.
- The need for coordination. Coordination is needed horizontally and vertically within and across governments. It is also needed at the local level, to coordinate SE activities and initiatives.
- The importance of stable, long-term funding.

- **ROLE OF SE IN DELIVERING POLICY (PROVIDING PROGRAMS AND SERVICES)**

Many of the SES projects concerned SE organizations that were delivering programs and services – i.e. helping implement or produce government policy. These fall into two main streams – delivering government-initiated programs and services and filling gaps in services (perhaps identified through successful advocacy work).

- ***Delivering government programs***

SE organizations have long been contracted to deliver government programs, especially in the area of health, social and community services. The boundary of the public sector has also shifted over time. Programs that used to be delivered in-house have been contracted out for various reasons. In recent years this has often been a form of offloading, reflecting an ideology of smaller government and helping with deficit reduction. In such cases cheaper SE labour is substituted for public servants; long term commitments are avoided. An alternative is to be found in Quebec, where the SE is more actively promoted through assignment of programs to it, such as childcare (Loxley and Simpson 2007: 38-40). Examples of SES projects involved in delivering government programs include 4.1 (watershed groups delivering septic repair services), S.12 (eldercare in New Brunswick), and several PEI organizations interviewed as part of 2.6.

- ***Filling Gaps***

Other SE organizations initiate programs that fill gaps in existing government policy. Domestic violence programs (2.14), services for youth (2.3), the Kid’s Action Program Food Box program (3.1) and immigrant services (S.2) are examples of this.

- ***Issues/Challenges***

The challenges for service providers are many. For the most part, SE organizations do not feel they are consulted enough in the design of programs – they deliver programs but do not co-construct policy – and do not have the resources to lobby to the same extent as private business interests.

The structure of funding is of particular concern. As with advocacy groups, core funding is desirable in order for long term planning of services and maintenance of the organization. Project 2.6, Mapping Supports for the Social Economy (Groome Wynne 2008), found that only a fraction of organizations interviewed had core funding, and found it is practically extinct at the federal level. Many complain of the bureaucratic requirements for funding, fulfilled at the cost of service provision. Resources are spent ‘chasing funds’ rather than meeting client needs. Services need to be tailored to meet (changing) funding criteria, and chasing funds can result in spinning off new services that may not be sustainable. Staff resources are often limited, with a reliance on volunteer labour; those who are paid are often underpaid and overworked compared to their counterparts in the public and private sectors. Organizations are affected by shifts in government priorities. In New Brunswick funding for watershed organizations to implement a program for septic system repairs was dropped (4.1).

Accountability and performance measures are also a big issue. SE organizations feel hampered by some of the accountability hoops they have to jump through. They constantly gather data they suspect no one in the government reads anyway (3.1). Despite positive program reviews, programs are dropped – for example no start up or extension grants are available now to programs such as the Kids Action Program Food Box program (federally funded). Moreover, accountability criteria and performance measures can have a direct impact on the type and quality of services they can provide. The formula for funding elder care services, for example, makes it very expensive to offer services to isolated individuals (S.12), as travel time is not compensated. Some SE economy service providers are also responsible to more than one government department or level of government, adding to the complexity of funding and reporting. Accountability requirements have become more burdensome as federal grants are replaced by contribution agreements (2.6).

Overall, service providers are mired in red tape, particularly in relation to federal programs (2.6, Groome Wynne 2008).

- ***Lessons learned***

- The importance of partnerships. Service providers want to build partnerships with government. They want input into developing appropriate accountability measures and funding formulae.
- The need for measures that capture the full value of the services provided and resources used by the SE. Off-loading of government services onto the SE saves money by relying on volunteer, underpaid and overextended labour; excessive or inappropriate accountability criteria, designed to protect the government’s investment, waste precious staff resources and detract from the ability to provide services. This is a false economy. The services delivered by the SE provide value to the individual ‘clients’ and also to the broader society. SE service providers can show that the government gets a ‘big bang for its buck’ – they are flexible and adaptable and they save governments money in other areas (keeping people out of hospitals, courts...).
- The need for flexible, stable funding. Core funding is preferable to project funding. It builds capacity, gives the organizations flexibility, and allows groups to focus on

service delivery. Organizations across the region and in various sectors feel their work has been hampered by the transition from core to project funding.

- **SOCIAL ENTERPRISES AND POLICY**

Several SES projects focused on social enterprises such as cooperatives, credit unions and others offering goods and services for sale in the market. Projects included the Survey of Cooperatives and Credit Unions (1.1), which addressed policy impacts and interventions, S.4 on the policy context for cooperatives in New Brunswick, 1.5 on the value of social enterprises in Lameque-Miscou, 2.1 on the LEAP cooperative to support women's entrepreneurship through common services, including a childcare centre, 2.8 on the PEI Organic farmer-Citizen Cooperative, 4.2 on a forestry cooperative in New Brunswick, 4.3 on a farmers cooperative in Dieppe, 4.7 on indigenous craft cooperatives, 5.2 on the Fogo Island Cooperative (fisheries). Other projects focused on cross-cutting issues of importance to social enterprises, including 5.1 on financing social enterprises, 5.3 on accounting for cooperatives, 5.4 on performance measures for a school organized as a social enterprise, 5.5 on management tools for cooperatives, 5.7 on developing indicators of the 'cooperative difference', 5.10 on employment law and workers cooperatives, and 2.17 on developing domestic fair trade for food products.

- *Issues/Challenges*

Social enterprises want a level playing field with the private sector. They experience challenges in this regard in terms of access to government funds and programs, and ability to participate in the policy process.

The government's role in access to financing by social enterprises is twofold, providing direct support to businesses (e.g. ACOA, or through community investment funds) and also setting the regulatory framework for private sector financial institutions. A policy scan conducted by S.4 on cooperatives in New Brunswick found a two-tiered system of government support, to the detriment of cooperatives compared to other enterprises. The report calls for a cooperative development grant program, help for the capitalization of cooperatives and other social enterprises, and equal access for cooperatives to government programs designed for private for-profit enterprises (Hancock 2009). Project 5.1 on financing social enterprises found a high rate of social enterprises being turned down for external financing (41%), with the main reason being that the financier does not fund social enterprises. The LEAP cooperative in PEI (2.1) encountered difficulty accessing ACOA. They applied to a fund targeted at the social economy, which dried up with the change of government and priorities. Despite interest and encouragement from the local ACOA officer, the funding fell through. Like other SE organizations, social enterprises are affected by shifting political winds.

While social enterprises are concerned with access to government programs designed with the private sector in mind, they also want targeted programs. This is discussed in a report on project 5.1 on financing social enterprises:

“Innovative community development financing mechanisms have been developed for supporting social economy initiatives. In Canada, these

mechanisms take the form of social enterprise funds or trust, or tax credit programs. In Atlantic Canada, the Saint John Community Loan Fund, for example, has provided a community investment vehicle in the Saint John, New Brunswick region since 1989 (Saint John Community Loan Fund, 2009). The Nova Scotia Equity Tax Credit and Community Economic Development Investment Funds (CEDIFs) enable SEOs and communities to pool capital to be invested in community economic development initiatives” (Karaphillis, Alderson, and Moore, 2009:8).

On a positive note, they report that the Nova Scotia tax credit program had raised over \$30 M in equity for social enterprises. Note, however, that non-profit or charitable enterprises are not eligible for CEDIF funding.

Project 4.2 focused on the broader issue of the ability of social enterprises to influence policies relevant to their sector. Forestry policy in New Brunswick is dominated by the interests of 5 main companies; the challenge is for smaller social enterprises, such as a cooperative, to have a say, both in terms of their own business interests and also seeing that the forests are managed for long term environmental and community sustainability. They need tools and studies to make their case, as it is hard to go up against companies like McCain’s and Irving. In agriculture, policies such as seed regulation and others ‘cloaked in the language of public health’ (2.17) favour corporate interests over sustainable agricultural practices.

Social enterprises, like other SE organizations, are challenged by silos in government. For example, the Really Local Harvest (RCN) cooperative in New Brunswick, which works with small farmers, has interests that cut across agriculture, forestry and watershed sectors and ministries. They are also connecting rural interests (sustaining small farmers) with urban interests in food security (local markets). Similarly, the PEI farmer-citizen cooperative (2.8) challenges producer vs consumer silos. Cross-ministry programs like the federal Rural Secretariat are important in this regard. Social enterprises also need to work across their own sectoral silos. In Nova Scotia the Cooperative Council and the Federation of Community Services provide opportunities for a coordinated presence (Myers 2009).

Social enterprises are also challenged by accountability requirements and performance measures that may be used by government programs that are not reflective of their goals. Multiple bottom lines are becoming more common in social enterprises. The Survey of Cooperatives and Credit Unions (1.1) found 39% report on social impacts and 18% on environmental impacts (Therriault, Skibbens and Brown 2008:30). Project 5.3 investigated alternatives to the IOC (Investor Owned Corporation) accounting standards that would take better account of the social as well as business purposes of cooperatives. Governments (and government regulated financial institutions) look only at the standard bottom line. Projects 5.4 and 5.7 are also working on alternative ways to measure performance. The challenge will be to educate policy makers about such multiple bottom lines and incorporate such approaches into government practices.

Social enterprises are looking to government for more than capital. For example, training and other capacity building supports are needed (5.1). Project 2.17 investigates what is needed to facilitate domestic fair trade in food products, which would support a variety of social enterprises involved in food production and distribution.

Other policy areas, such as employment law, also need to be considered from the point of view of social enterprises. Employment law, based on the fundamental distinction between employers and employees, creates many challenges for worker cooperatives (5.10, McNamara 2009).

- ***Lessons learned***

- Many policies and programs related to business are explicitly or implicitly aimed at private sector firms. More education is needed to keep social enterprises visible throughout the policy realm.
- One approach is to develop a SE lens, similar to a gender lens, through which policies and programs can be evaluated for their impact on social enterprises (or other social economy organizations). This is a form of mainstreaming, such that the interests of social enterprises are considered across the policy spectrum. Loxley and Simpson discuss the pros and cons of such a lens, based on experience in Manitoba with a CED lens (Loxley and Simpson 2007: 42). If everyone is responsible, will no one be responsible? Will more than lip service be paid to it, as has been the experience with some mandated 'gender' reviews of policy?
- An alternative (or complementary) approach to mainstreaming is to develop more targeted programs, including funding, aimed at social enterprises. Quebec provides a model for such initiatives (Loxley and Simpson 2007; Neamtam 2009, Mendel 2009).
- Sectoral policies can be used to facilitate the growth of social enterprises, as in Quebec where the childcare and homecare programs are delivered through social enterprises (Loxley and Simpson 2007: 18).
- Accountability and performance measures suitable for social enterprises need to be developed, promoted and imbedded in the policy process. This requires coordinated effort.

- **INTERNAL POLICY AND GOVERNANCE**

'Policy' can be construed to include internal policies and practices of an organization, as well as public policy. Some SES projects shed light on internal policy issues of concern to SEOs. Some have been alluded to above, including accounting and performance measures, participation, networking and capacity building, staff retention and succession. Projects in subnode 5 had a particular focus on the internal operation of SEOs, as did the survey of cooperatives and credit unions in subnode 1 (1.1). Some other projects raised internal policy issues as well.

- ***Organizational form***

Several projects identified issues related to the choice of organizational form and finding the best form for their purposes. For example, the Halifax Independent School (5.4) found that the cooperative form did not meet its needs and became a registered charity, though they operate on cooperative principles. The Coastal Community Network (1.3) is considering changing its structure from a voluntary association of organizations to a social enterprise, partly to become more financially independent of government. In PEI, the LEAP cooperative tried to shift from unstable government support to private

fundraising, but did not have charitable status. Some projects documented efforts to mobilize around particular efforts, which include debating what type of organizational model to use. A project on the Fogo Island Cooperative focused on conflicts of interest in a cooperative of both workers and producers where workers are both unionized and members of the cooperative (5.2), an issue also addressed in the project on worker cooperatives and employment law (5.10). The latter project nonetheless recommends worker cooperatives support the labour movement (i.e. allow members to freely form/join a labour union), but also recommends cooperatives incorporate formal dispute resolution mechanisms and Human Rights legislation into bylaws – as well as establish Employment Equity programs – to maintain positive labour relations (5.10, McNamara 2009).

- ***Performance measures***

As noted earlier, SEOs are looking to develop performance measures and accounting practices that reflect their goals and measure their performance relative to multiple bottom lines and multiple stakeholders (1.1, 5.3, 5.4, 5.7). There are initiatives to develop accounting models suitable for cooperatives, given the differences in their goals compared to private corporations, building on the UK Charity SORP model (Statement of Recommended Practices) (5.3). Both economic and social audits would be part of this. In one project, indicators of participation are examined (5.5), while in another performance indicators are developed for a small SEO, building on the Balanced Scorecard (BSC) approach (5.4). In this case, which is a small independent school, measures of success would include student learning; opportunity to learn; responsiveness to students, parents, and community; and organizational capacity for improvement. While such measures will enhance the performance of SEOs in relation to their goals, it is essential that external players, including government and financial organizations, recognize the validity of these measures. This would contribute to leveling the playing field with the private sector. It would also be useful in improving funding relationships so that the evaluation measures funders require are in tune with the goals of the supported organizations (2.6, Groome Wynne 2008).

- ***Capacity Building and Networking***

One of the overarching themes in the research was the importance of, and challenges to, capacity building. This included issues at the level of one organization, as well as across organizations. Organizations are looking for ways to increase participation. The survey of cooperatives (1.1) found low levels of participation in larger cooperatives, with boards needing to become more inclusive. Studies of individual SEOs also raised issues of the need for more participation and transparency (5.4) Management can become more traditional over time as participation wanes (5.2). Income and time constraints limited the participation of low income mothers in the LEAP cooperative in PEI (2.1) and funding was not available to support the childcare needs of members. While lack of participation is one challenge, burnout from over-participation is also an issue. Both paid staff and volunteers tend to be overworked and underpaid, leading to burnout (2.6). A

related issue is the challenge of successions in small organizations and communities (4.7, 2.6, 1.5).

Capacity building *across* organizations is also crucial in order to influence policy. This is a challenge in smaller communities. For many initiatives, networking needs to occur across diverse groups of stakeholders to have a voice, as well as with government (4.5). In fact, one of the main roles of the social economy is to help build capacity for vulnerable groups, be they communities, sectors or demographic groups. The success of cooperative driven development in Lameque-Miscou is due to partnerships among SEOs and with different levels of government and the private sector (1.5).

- **CONCLUSION**

Atlantic Canada hosts a dynamic social economy critical to the general wellbeing of its stakeholders. SEOs play a crucial role in defending traditional livelihoods in fisheries, agriculture and forestry; reinvigorating cultural practices such as aboriginal ethnobotany; maintaining social services such as elder care once delivered by the state; and finding innovative ways to enhance living standards of often marginalized peoples such as new immigrants, disabled students and working mothers. SEOs, such as the Quality of Island Life Cooperative and the Halifax Independent School, also promote social values through innovative measures/indicators (such as triple bottom line accounting). These values can also be marginalized in – and difficult to reconcile with – a broader economic system focused on profit maximization. Despite these important roles and contributions to living standards in Atlantic Canada, policy issues related to the social economy remain understudied.

The research by the SES Research Network, though not always explicitly focused on policy, revealed a lot about the intersection of the social economy with the policy arena. Organizations advocate on behalf of communities of interest to shape policy. They deliver policy, serving the needs of communities and creating economies for government. As co-producers of policy social economy organizations face many challenges. Their work is hampered by changing programs, multiple levels of government, poor communication, unstable funding, underfunding, sectoral silos, red tape, and performance measures out of line that fail to reflect their objectives. The research reveals little evidence of policy co-construction, as processes remain largely top-down. Relationships are typically bilateral in nature, despite the importance attached to networking and the recognition by SEOs of intersecting and complicated issues. Policies are needed that support the social economy by design, and that recognize its value beyond provided cost-effective services and filling gaps in the margins of the market.

Works Cited (see in addition the specific papers and reports listed by project number below):

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Romanow, P., & Munro, I. (2008). *Fishing for the future II: Tracking the coastal communities network from first beginnings to economic sustainability report*. Coastal Communities News.

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**Project: S.13 Examining the Risk of Lost Knowledge with Personnel Changes in
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