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Expectations and Realities of Engaged Scholarship: Evaluating a Social Economy Collaborative Research Partnership

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Sean Markey

Abstract

This paper examines and evaluates the dynamics of engaged scholarship within a complex community-university research partnership. The British Columbia–Alberta Social Economy Research Alliance (BALTA) brings together academics and practitioners with the goal of advancing understanding of the social economy and contributing to the development of a social economy research network in western Canada. Engagement in BALTA refers to both internal (academic and practitioner research partnerships) and external (research process) project components. Our findings indicate that the structure of the project, dictated in large part by funder requirements and the professional cultures of research participants, greatly influenced the nature and quality of engagement. This paper examines the BALTA initiative and the reflexive and adaptive process it has undergone as it responds to various challenges and seeks to realize the ideals and potential of engaged scholarship.

Introduction

This case study assesses the successes and challenges of participants in an engaged scholarship project as they navigated the requirements of an academic funding agency and negotiated their shared and sometimes conflicting research objectives and outcomes. BALTA is one of six regional research partnerships established across Canada to investigate the social economy, with five years of funding (2006–2011) from the Social Sciences and Humanities Research Council (SSHRC) of Canada, the federal agency for higher education research and training in the humanities and social sciences across disciplines and all sectors of society (http://www.sshrc-crsh.gc.ca/about-au_sujet/index-eng.aspx).

Created by an act of Canada's Parliament in 1977, the SSHRC reports to Parliament through the Minister of Industry. These partnerships, collectively referred to as the Canadian Social Economy Research Partnerships, are “made up of university-based researchers and representatives of community-based organizations operating as intellectual partners to create regional nodes (networks) that will conduct research relevant to the social economy in Canada” (SSHRC of Canada, 2006, p. 3).

The BALTA partnership consists of 50 academics and practitioners based in British Columbia and Alberta, as well as nine national and international collaborators, and over 70 student research assistants. In addition to practitioners from a number of different social economy

organizations, the academics involved represent a range of social science disciplines.

BALTA's definition of the social economy includes those organizations animated by the principle of reciprocity in pursuit of mutual economic or social goals, often through social control of capital. This definition would include all cooperatives and credit unions, nonprofit and volunteer organizations, charities and foundations, service associations, community enterprises, and social enterprises that use market mechanisms to pursue explicit social objectives. It would also include for-profit businesses where those businesses share surpluses and benefits with members (and/or the wider community) in a collectively owned structure (for example, a cooperative). For the purpose of our study, this definition would not include entirely grant or donation-dependent nonprofit and voluntary organizations.

Conceptually, the social economy is often considered to be the third sector of the economy, as distinguished from the public and private (for-profit) sectors. The social economy is, however, engaged in a process of continuous evolution and may partner with public and private sectors and, in this way, is founded on the principles of pluralism, reciprocity, and social integration (Pearce, 2003; Neamtan, 2009).

This paper draws upon the literature of engaged scholarship to provide a conceptual framework for our analysis. To organize our findings, we draw upon a three-part framework developed by Schulz et al. (2003) consisting of

context, structure, and function. The community-university research model, which emphasizes institutional and community collaboration for mutual benefit, is well suited to an investigation of the social economy. Engaged scholarship is also seen as particularly advantageous in addressing emerging and complex social issues or social movements where knowledge about the subject is fragmented, uneven, or lacking cohesion (Holland and Ramaley, 2008). The social economy is one such case. Despite representing a significant and rapidly expanding segment of the national social and economic infrastructure, the social economy is still relatively poorly defined throughout most of Canada.

Of the six social economy research nodes funded by the SSHRC, BALTA is the only node led by a practitioner organization. The Canadian Centre for Community Renewal (CCCR), a community economic development non-profit organization specializing in resources and expertise to support social economy organizations, serves as the coordinating organization for the research alliance. The CCCR executive director holds the position of principal investigator for the research partnership. The leadership of the research partnership by a practitioner organization has had significant impact on the evolution of BALTA's administrative and governance structures.

In this investigation of the relationship between structure and function in a practitioner-led research alliance, we explore the boundaries and assumptions framing community-university partnerships and how these are impacting the effectiveness of engagement within this particular case. This analysis provides a glimpse of the experiences of academics and practitioners as they try to negotiate the differences and demands of their professional cultures while also creating a space for genuine engagement. Our goal is to further understand the challenges and potential of community-university engagement to build and mobilize knowledge about emerging and complex social movements.

In the following sections, we will expand upon the definition of the social economy before situating this study within the literature on engaged scholarship. Following these sections, we provide a more detailed description of the BALTA research process and discuss the dynamics of the research and engagement processes and outcomes.

The Social Economy: A Platform for Engaged Scholarship

In 2004, the term “social economy” was

officially recognized in Canada in the Speech from the Throne as “the myriad not-for-profit activities and enterprises that harness civic and entrepreneurial energies for community benefit right across Canada” (Governor General Adrienne Clarkson, 2004). In fact, the social economy has been in practice for decades and constitutes a \$100 billion activity that has been all but unrecognized by senior levels of government (Fairholm, 2007). Although an exact portrait of the social economy in Canada is still incomplete, there is ample evidence to suggest that it represents a significant and rapidly expanding part of the national socio-economic infrastructure (Neamtan & Downing, 2005).

The social economy is often distinguished from the public and private sector economies on the basis of differences in the organization of production, distribution, and consumption (Lloyd, 2007; Neamtan, 2009). Lukkarinen (2005) writes that organizations and companies within the social economy arise in response to social needs that are not being met by the market or existing government programs. Social economy organizations (SEOs) may have economic objectives, but are not driven by a profit motive; they can, however, have significant job-generating potential, particularly for those who are disadvantaged by the labour market.

SEOs are described in more detail by Brown (2008):

Rooted in local communities and independent from government, Social Economy organizations are democratic and/or participatory, pull together many types of resources in a socially owned entity, and prioritize social objectives and social values. While they may intend to make a profit, they do so in a context that sees profit as a means to meet social goals, not primarily as a means to create individual wealth. They may rely on volunteer labour as well as, or instead of, paid employees. The Social Economy is characterized by mutual self-help initiatives, and by initiatives to meet the needs of disadvantaged members of society.

Given that SEOs tend to be closely linked to the communities in which they operate, often relying on volunteer labour and partnerships with government, labour, and the private sectors (Neamtan, 2009), engagement forms a critical part

of social economy development. This emphasis on engagement in the social economy set the foundation for the BALTA partnership.

Engaged Scholarship

Interest in community-university engagement and partnering has been gaining momentum over the past two decades as part of an evolving discourse on the nature of knowledge, knowledge mobilization, and the role of academic institutions in society. Although relationships between universities and communities have long existed, engaged scholarship represents a partnership that “blends the intellectual assets and questions of the academy with the intellectual expertise and questions of the public” (Holland, 2005, p. 11). Reciprocity and mutual benefit are acknowledged as core elements of engagement (Boyer, 1996; Holland, 2001; Holland and Ramaley 2008; McNall et al., 2009).

Community engagement is the collaboration between institutions of higher education and their larger communities (local, regional/state, national, global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity (Carnegie Foundation, 2008, p. 1).

In Canada, recent changes in federal research funding criteria and growing awareness of the concept and benefits of university-community engagement are beginning to transform the way in which academic institutions interact with the larger community. Canada’s three research councils—the SSHRC, the Natural Sciences and Engineering Research Council, and the Canadian Institutes for Health Research—specifically target community-university research projects for funding. Driven in part by the availability of funding support, universities across Canada are adopting, and in some cases institutionalizing, community engagement, as noted by Hall (2009). Hall adds that although engagement may not be the “only trend in Canada’s higher education,” it appears to be increasingly significant and it is revitalizing enthusiasm in the concept of universities as a force for the public good (2009, p. 12).

Boyer’s 1990 report for the Carnegie Foundation for the Advancement of Teaching, “Scholarship Reconsidered: Priorities of the Professoriate,” is often cited as the seminal piece triggering discourse on engagement in North America (Boyer, 1990). In his report, Boyer critiques the rigidity of academic institutions stemming from the division of knowledge into disciplinary silos and the narrow view of what

constitutes knowledge and academic quality. This traditional model of knowledge construction, prevalent throughout most of the past century, is also socially stratified in that academics are viewed as “society’s primary generators and transmitters of knowledge” (Holland 2005, p. 12). Boyer calls for a “reconceptualizing of the relationship between academic reflection and civic involvement” (1990, p. xii), which he describes more fully in “The Scholarship of Engagement” (Boyer, 1996). Over the past two decades, there have been wide-spread dialogue and reflection on the nature of knowledge construction and mobilization and the role of institutions of higher learning. Although much work still needs to be done before engagement “achieves consistency and coherence as an academic activity” (Holland, 2001, p. 1), in North America, agreement is forming around definitions and terminology. Whereas engaged scholarship refers to the process of “doing engagement” (McNall et al., p. 319), the scholarship of engagement is now defined as the process whereby academics and their partners “reflect on, study, write about, and disseminate scholarship about their [engagement] activities” (National Centre for the Study of University Engagement 2008, p. 1).

Sandmann (2008) and Stanton (2008) describe two different perspectives on what qualifies as engaged scholarship. There are those who view engagement as an overarching framework, encompassing a broad spectrum of collaboration and knowledge exchange processes, all striving to create systematic change (Muirhead and Woolcock, 2008; Toof, 2006). Community-based research, participatory research, service-learning, and public scholarship are scholarly methods often identified with this broader view of “institutional civic engagement” (Sandmann, 2007, p. 549). Other advocates of the scholarship of engagement contend that if it is to be a truly collaborative process, it is most accurately and effectively represented by those community-university partnerships that are reciprocal in nature and generate mutual benefits for both academic scholarship and society (Holland, 2005, Gibbons, 2006). To achieve this, Pearce et al. identify the need to “break down barriers between academics and practitioners, encouraging mutual respect and building shared approaches” (Pearce et al., 2008, p. 23).

Currently, there is no unified theoretical framework for engaged scholarship although some analysis has been informed by equity and social change theory (Fogel and Cook 2006, Bringle and Hatcher 2002, Maurrasse 2002). Weerts

(2005) applies Havelock's theory of knowledge flow, and Prins (2006) draws upon social theory on knowledge and power. Knowledge is central to community-university research partnerships, and as Foucault reminds us, knowledge is always contested ground (Foucault, 1980). According to Foucault, what constitutes knowledge, what is to be excluded, and who is designated as qualified to know all involve acts of power. Prins writes that "because power is embedded in all social relationships, individual actions, no matter how well-intentioned, both reflect and alter the power relations among [community-university] partnership members" (2006, p. 3). She cites several studies that illustrate how the expert status of academic institutions maintains a stronghold in specific research collaborations, which allows them "intentionally or unintentionally" to influence the research agenda and control resources (Ibid, p. 3). However, Stoecker (1999) maintains that the project initiator will always retain more power in a research partnership, regardless of whether the initiator is a university or community member. Shragge and Hanley (2006) contend that power imbalances can also be supported by existing research funding policies, and they suggest a need for changes in policy directions.

There is a tendency to place knowledge into distinct categories and positions of dominance or subordination. But knowledge, whether academic or community-practitioner based, is never discrete, uniform, or static. Rather, knowledge emerges out of complex social processes, through "the discontinuous, diffuse, and value-bound interactions of different actors and networks; it is a process of both interpretation and negotiation" (Long & Villareal, 1994, p. 49). Therefore, in supporting the view of engaged scholarship as a social contract for democratizing the knowledge process, we argue that it is necessary to acknowledge and examine social context and relations of power in the process of knowledge construction and mobilization.

A useful framework for investigating the connections between context, structure, and function was developed by Schulz et al. (2003) and adapted more recently by McNall et al. (2009). In this framework, context (identified as environmental characteristics) is seen to have a direct influence on the structural characteristics of the partnership, on the way the partnership works, and also on the types of programs or interventions put in place to guide the partnership. McNall et al. list contextual factors that can influence the structural characteristics of the research

partnership: prior relationships and motivations of the partners, competing institutional [and professional] demands, and trust and the balance of power (2009, p. 320). Criteria for successful engagement are also identified by McNall et al. including: shared leadership and resources, two-way communication, participatory decision making and agreed-upon problem-solving processes, mutual respect and benefit, flexibility and innovation, and ongoing evaluation. The ability of a partnership to meet the criteria for engaged scholarship and its targeted outcomes is directly influenced by context, structure, and function. Following the methods section below, we will examine the interrelatedness of these aspects of community-university partnerships and the nature of relationships formed between various BALTA engagement process actors.

Research Methods

The purpose of our investigation was to examine and evaluate the process of engagement in a practitioner-led community-university research partnership. Our case study draws on the results of BALTA's monitoring and evaluation program (see Table 1). The SSHRC funding agreement requires BALTA to conduct ongoing evaluations of the process, outputs, and outcomes that are then reported back to the SSHRC. BALTA developed a monitoring and evaluation program that included gathering quantitative and qualitative data for reporting to the SSHRC and to gain feedback and suggestions from participants about the development and implementation of the research partnership. Detailed records were collected on the number of participants, types of research outputs, and allocation of funds. Feedback was obtained from practitioners and academics by conducting three rounds of telephone or in-person interviews in late 2007 and via two email questionnaires in the spring of 2008 and the fall of 2009. In addition to these activities, feedback from participants was solicited at each BALTA annual planning forum and a special focus group was conducted with student research assistants in early 2008. The results were reported to the BALTA Steering Committee and used to compile information for the mid-term review and report to the SSHRC in 2008 and to measure the progress and success of the partnership to secure continued funding. Drawing upon the findings of this evaluation process, we explore the dynamics of the BALTA research partnership and the convergence of two professional cultures in order to contribute to a greater understanding of the process of engagement in a practitioner-led

Table 1. BALTA Project Timeline and Evaluation Program

Time Period	BALTA Developments	Monitoring & Evaluation
2005	Initial development of proposed BALTA partnership and research program	Initial setting of intended outputs and outcomes
March 2006	BALTA receives five year Council grant and is established	
April 2006 - January 2007	Development of the partnership and its framework - visioning, policy, and systems development, etc.	
October 2006	First meeting of the BALTA membership and first planning forum	
January 2007	Second planning forum	
February - May 2007	Development and approval of initial research plans and projects	Development and approval of a basic framework and plan for monitoring and evaluation
March 2007		Initial evaluation of progress and development of Milestone Report to Council
September 2007		Hiring of doctoral student as assistant evaluation coordinator
Autumn 2007 - Spring 2008	Research projects being implemented	Development of more detailed monitoring and evaluation framework. In-person and phone interviews with BALTA members in late 2007 as first stage of evaluation of the partnership development
January 2008	Third planning forum	
February 2008		Evaluation focus group with BALTA student researchers
February - May 2008	Development and approval of second annual research plans and projects	
May - June 2008		Email survey of BALTA members to update evaluation of the partnership development and assess research results to date
July - September 2008	Further research projects being initiated	Mid-term evaluation of BALTA and development of Mid-Term Report to Council
November 2008	First BALTA symposium to present research results	
March - May 2009	Development and approval of third annual research plans and projects	
Summer - Autumn 2009	Further projects being initiated	
November 2009	Second BALTA symposium to present research results. BALTA membership endorses exploration of options for continuing BALTA beyond the current Council grant	
February - April 2010	Development and approval of fourth annual research plans and projects	
Autumn 2010	Approval given to explore models for continuing BALTA and development of a new funding proposal to Council	

Framing the Partnership

From the beginning, proponents of the BALTA partnership were motivated to create a model of engagement that was genuinely collaborative and would generate both theoretical and practical knowledge about the social economy. In BALTA's case, the model is at least as important as the specific research that is implemented. From its inception, the intent has been to develop a platform for social economy research that is jointly conceived and prioritized by both practitioners and academics and that addresses the needs of both groups (BALTA, 2008, p. 1).

The work framed by the BALTA partnership is outlined in the following five objectives:

(1) To create an effective network of academics, researchers, and social economy partners in order to sustain the kind of long-term knowledge production and exchange necessary to strengthen and grow the social economy for many years to come.

(2) To understand better the scope and characteristics of the social economy in the region and to contribute to designing measures for tracking its progress.

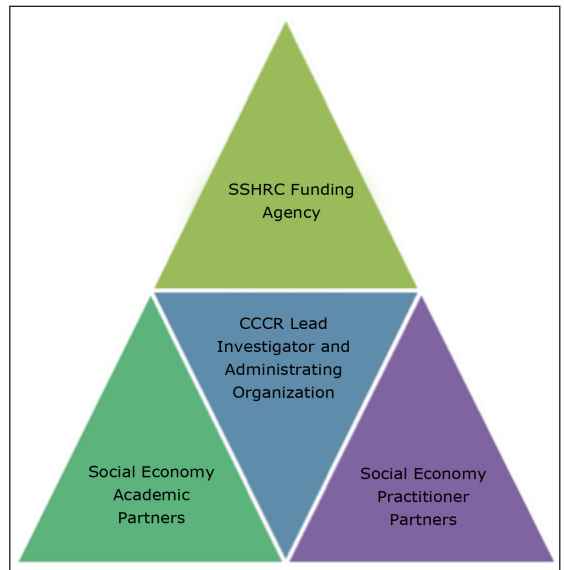
(3) To assess and better understand exemplary practices, both within and outside the region, and analyze the requirements for their replication and/or scaling up in the region.

(4) To speed the exploitation of knowledge about these exemplary practices in and between both provinces; and

(5) To contribute to the design and development of the social economy infrastructure in British Columbia and Alberta, especially to contribute to defining and promoting policy and regulatory changes and other infrastructure that will support the growth of the social economy (BALTA, 2008, p. 15).

The structure of BALTA was developed to be consistent with a collaborative model of engagement that could meet the objectives identified for the partnership. This structure has been defined and shaped by the dynamic relationships formed among the stakeholders: the funding agency (the SSHRC); the Canadian Centre for Community Renewal (CCCR) serving as lead coordinating organization; academics; and practitioners. Some of these relationships can be viewed as external to the actual research partnership between academics and practitioners, while other relationships are more central or internal to the partnership, as shown in Figure 1.

Figure 1. Partnership Model



At the top of the diagram is the vertical level of engagement formed by the administrative relationship that takes place between the SSHRC and CCCR. This hierarchical relationship defines the funding context within which the BALTA research partnership must function and the guidelines to which it must conform, but is viewed as being external to the daily workings of the research partnership. Beneath this level is the internal and horizontal level of engagement formed between CCCR and the practitioners and academics, as well as the relationships forged between individual research partners. CCCR, holds the position of principal investigator and is responsible for managing the research based on the terms and requirements of the funding agreement. CCCR also facilitates and mediates the relationships between the academics and practitioners in order to establish and maintain a collaborative research partnership.

The External Process of Engagement

The external process of engagement consists of the research policies, relationships, and professional cultures that are independent of the research partnership but which have a significant influence over how BALTA is structured and functions. In particular, the overarching context of the SSHRC's funding policies has framed BALTA's development.

Despite receiving project approval by SSHRC for five years of funding, CCCR encountered considerable challenges navigating through the terms, conditions, and administrative requirements needed to initiate the project. As a community

development organization without academic status or previous SSHRC contract experience, CCCR was required to pass an approval process to qualify as the administrative body for the SSHRC funding (BALTA, 2008). While awaiting the SSHRC's decision BALTA demonstrated flexibility and innovation by entering into an administrative partnership with a local university, which had approval by SSHRC. This co-administrative relationship allowed BALTA to move forward with planning the research partnership by having the funds channeled through the university to BALTA. As part of this arrangement, an academic co-principal investigator position was established in BALTA for a faculty member from the partnering university.

In 2008, following two years of SSHRC deliberation, CCCR withdrew its application and has continued with the co-administrative arrangement with the partnering university. The academic co-principal investigator position has since been dissolved and the executive director of CCCR has continued the role of principal investigator. In essence, this arrangement has enabled BALTA to run its own administrative duties, with the assistance of a project manager, under the supervision of the steering committee and the principal investigator, with funding from the SSHRC being directed through the partnering university (BALTA, 2008).

The second external process of engagement that surrounds the BALTA collaborative platform is the established professional cultures and networks of both the practitioners and the academics. As the leading government funding agency for social science research in Canada, many of the academic partners have an established history of working within SSHRC's funding framework and have a shared professional culture of knowledge with the organization. This relationship occurs outside of BALTA and is not mediated by the lead administrative organization. Practitioners, however, did not have a prior relationship with or professional knowledge of the SSHRC's academic funding policies. Thus, their relationship with the SSHRC has been mediated through CCCR.

As will be discussed below, these external relationships between the funding policies and professional cultures have significantly influenced how BALTA has engaged in the community-university research process. CCCR and the BALTA steering committee have had to navigate these external challenges and move toward creating a successful collaborative research partnership.

The Internal Process of Engagement

Horizontal collaborations among CCCR, academics and practitioners occur within the internal or core of the BALTA research partnership. These relationships also influence the structure and function of the BALTA research alliance, but in a more direct and immediate way than the external relationships described above. The collaborative university-community partnership was created to identify research that would be strong in both theoretical exploration and practical results. To achieve this, BALTA adopted a governance structure that is based on shared leadership and participatory decision-making, and has equitable representation by academics and practitioners. It is comprised of a steering committee, the central governance body in which the principal investigator is the chair, and three thematically defined social economy research clusters (SERCs).

The steering committee consists of equal representation of practitioners and academics. Similar to a board of directors, it is responsible for setting the general directions of the research, establishing policies in line with SSHRC guidelines, and approving research proposals submitted from the clusters. The balanced composition of the steering committee is to ensure equitable and participatory decision-making by representative research partners. This committee and CCCR, as the primary administrative body, are held responsible for transparency and accountability to SSHRC and the BALTA research alliance as a whole.

All research members of BALTA are identified with one of the three clusters that focus on human services and affordable housing; rural revitalization and development; and analysis, evaluation, and infrastructure development. The SERCs are composed of varying numbers of academic and practitioner partners. The role of individual members is to propose and supervise the implementation of the research projects. Each SERC is chaired by an academic and a practitioner. The academic-practitioner co-chairing was an adaptation to the SERC structure introduced in 2008 to ensure the involvement of practitioners in the research projects.

From Planning to Implementation: The Challenges of Collaboration

To realize BALTA's objective of creating a robust research network, three research forums, facilitated by the principal investigator, were conducted between 2006-2008 to identify shared objectives between the practitioners and academics and to design and assess the ongoing research

program for each social economy research cluster. The development of the BALTA research program evolved with each forum as new researchers joined the partnership. Feedback from participants reflected concern and confusion about the overall direction of the program.

Here is an example from a BALTA participant in 2007:

Principles of working together need to be defined; there needs to be some clearly articulated game plan with goals, actions, and to do items with roles and responsibilities identified and people to take ownership.

Responses from participants interviewed in the year following, however, reflected a general optimism for the research alliance.

There has been a high degree of respect between both groups and a recognition of skills and interests, high level of commitment and an increased understanding of the needs and expertise and methods. ...Really good, starting to come together, respecting the differences between the partners and the different goals that each group has for participating (BALTA participant, 2008).

In general, participants expressed a commitment to integrate the interests and on-the-ground expertise of social economy practitioners with the theoretical foundations and critical analysis of academic research. What facilitated this change in attitude was a growing level of trust and mutual respect developed through individuals communicating and working together. The sharing of leadership and resources was also viewed as fundamental to forming equitable partnerships.

There have been challenges in the early stages in understanding the perspectives and realities of each culture—practitioner and academic—and forging a strategic common perspective and agenda, but learning has occurred and the general assessment was that the second planning cycle, culminating in the approval of 2008-2009 research plans, exhibited a much stronger strategic analysis and united perspective. A greater number of projects are also being co-led by both an academic and a practitioner (BALTA, 2008, p. 2).

As BALTA moved from the planning phase of the research program into project implementation, participants identified other issues that emerged

as the collaborative research model was tested. These can be grouped according to four themes: lack of clarity about roles and responsibilities; lack of engagement of all partners; concern over methodology and research quality; and concern about the productivity and output of research projects.

Clarity and understanding of roles and responsibilities was a primary theme throughout all the meeting evaluations, participant interviews, and the student focus group. Although a terms of reference document was developed and made available, confusion over the scope of various roles and their associated responsibilities—who was supposed to be doing what—was a common early criticism of the BALTA partnership. The original design of the SERCs identified two co-chairs and nine to twelve research partners for each cluster. Two of the three clusters were chaired by two practitioners and the third was chaired by two academics. The ratio of practitioners and academics varied significantly between the three clusters, from an equal number of practitioners and academics in SERC 1 to two practitioners and nine academics in SERC 2 to nine practitioners and two academics in SERC 3. The steering committee addressed this imbalance by recruiting and redistributing practitioners and academics more evenly throughout the SERCs and by making changes in the co-chair positions to balance academic and community co-chairs in each SERC.

It became clear that our initial cadre of co-investigators and collaborators, both academic and practitioner, did not include a sufficient number of people with capacity to lead research projects and supervise students. We have recruited new members with such capacity, mainly academics but also some practitioners with research experience (BALTA, 2008, p. 2).

When partners were asked the following year if they had experienced or noted any changes in research clusters functioning, most reported an improvement in communication and organization. These internal structural modifications have not, however, completely resolved the challenge of achieving equal participation in research projects. We have witnessed clear benefits associated with co-implementation of research projects. However, it is also important to recognize the differential capacity of academics and practitioners for engaging in research (time, methodological approach, access to research assistants) such that BALTA has experienced positive collaborations in designing and analyzing research, while leaving the operation of the research process to the academic

partners.

It was widely acknowledged by all members that a major obstacle to practitioners fully engaging with BALTA has been the funding policy that restricts direct compensation of practitioner involvement in BALTA. This policy therefore presents a dilemma for practitioners wanting to be fully engaged in BALTA research, yet at the same time needing to fulfill their responsibilities as paid staff in community organizations. With the exception of funding for the principle investigator, the SSHRC's funding policies proved cumbersome and largely inappropriate for community-based researchers. The following comments reflect the frustration of two participants over this issue:

A systematic challenge from the beginning is the structure of the SSHRC funding—it is supposed to be a community and academic program but there is only funding to pay for the academics and students. If we want to have someone from the community participate, they have to do it for free (BALTA participant, 2007).

But it isn't working related to how SSHRC has set up how the funding is distributed; there is zero incentive for the practitioners to participate because they cannot be compensated for their work and other priorities end up taking precedence (BALTA participant, 2007).

These comments prompted a suggestion in a 2007 BALTA report to the SSHRC for changes in funding policies so as to be more aligned with the goals of equal participation and mutual benefit for academics and practitioners in engaged research projects:

We find that many long established SSHRC policies—for example with respect to funding of community based researchers—hinder the realization of the vision. We have continued to evolve strategies to deal with this challenge, but would strongly encourage SSHRC to consider how to better tailor its operational and financial policies to the aim of effective community-university research collaboration” (BALTA, 2007, p. 1).

As a result of the existing policy structure, the majority of research continues to be conducted by academics and student research assistants.

Practitioners report that most of their time dedicated to BALTA has been focused on the identification and design of research projects, with little time and effort afforded for project implementation. This brings into question the expectations and realities of participation in engaged research and speaks to the need for deeper analysis of the impact of funding policies on research partners.

One of the key challenges experienced by academic partners is balancing the professional needs and interests of the community partners with their own professional mandate of ensuring academic research standards. These different and sometimes conflicting agendas have impacted the effectiveness of leadership within the SERCs and the project teams, and consequently, the timely completion of some projects. As mentioned previously, most of the research has been conducted by undergraduate and graduate student research assistants working under the supervision of academic partners. For students without a background in the social economy, it has been challenging getting up to speed on the subject and meeting research expectations within the identified time frame. Particularly during some of the early research projects, the students reported that they were not receiving adequate guidance and support from project supervisors in order to fulfill their research tasks effectively. This led to a revamping of how research assistants were recruited and supervised to ensure that research was carried out with the necessary academic rigor and also within the contracted time frame. Changes in student hiring also included longer contracts and assigning academic and practitioner co-leaders to many projects to ensure adequate supervision of research activities (BALTA, 2008). Involvement of practitioners in research supervision was part of the strategy to increase their participation in the implementation phase.

One participant expressed a concern shared by both academics and practitioners in the overall integration and integrity of the BALTA research program:

We are...nearing the end of the project and attempts at synthesis seem weak. My fear is that at the end of BALTA we will end up with a bunch of fragmented stuff that will have little strategic, practical, or academic value. It will be a website that simply and very quickly becomes out of date (BALTA participant, 2009).

For BALTA to reach its research objectives there

is a need to synthesize and present the research findings in formats accessible to both academic and practitioner audiences. The productivity rate in the early stages of the project needed to be improved if the collaborative research partnership was to be considered successful in advancing and mobilizing knowledge about the social economy in western Canada. The 2008 SSHRC midterm review commended BALTA on the collaborative research network it was developing, but raised concerns about how effective the partnership was in generating research outputs. Prior to the midterm review there was a concerted effort to produce and mobilize research results to a broad audience. This did increase the number of academic papers presented at conferences and practitioner-oriented discussion papers, but there were only a small number of articles submitted to academic, peer reviewed journals. In the final year of BALTA funding, efforts are focusing on the completion of all research projects, with targeted outputs for both practitioners (e.g. reports, website development, resource tools) and academics (e.g. journal articles, book projects, curriculum). This reflects the desire to meet academic and SSHRC expectations for academic outputs while also addressing the interests and needs of practitioner partners.

Lessons Learned

In this paper, we have identified and described key internal and external relationships that have defined and influenced the structure and process of engagement in BALTA. This case study raises important questions concerning the disconnect between the goals of engaged scholarship and the realities of institutional funding policies and the collaboration of two professional spheres with different and sometimes conflicting objectives and methodologies. Canada's research councils' commitment to funding university-community research partnerships has created a significant and timely opportunity for academics and practitioners to work together on important socio-economic and environmental issues, drawing upon each other's skills and expertise. These partnerships have great potential to enrich both professional spheres and, in the case of BALTA, have helped to build a greater understanding of the social economy in Canada. However, our analysis of the BALTA experience reveals that there can be significant obstacles to actualizing the ideal of truly collaborative and engaged scholarship.

First, our research shows that restrictive funding policies can limit participation of

practitioner research partners, which in turn impacts on the equitable contribution of time and effort that partners can dedicate to the design and implementation of the research program. Funding arrangements thus created a power imbalance within the internal dynamics of the partnership (Shrage & Hanley 2006). As part of their job description, academics are able to dedicate time to research and are also able to expand their involvement through access to SSHRC's release [from teaching] funding. Although efforts were made in BALTA to maintain a structural balance of academics and practitioners within the SERCs, the involvement of practitioners was limited by their difficulty in accessing release funding in addition to the fact that research was not built into most community participants' job descriptions and work time commitments. Given these conditions, this type of research partnership severely limits the capacity for the direct engagement of practitioners.

Second, our research reveals that the dynamics of external and internal relationships influence the process of engagement. The unique challenges of BALTA associated with its practitioner-led partnership model underlines the need for continued exploration of not only why engagement is important but also how the process of engagement works, in its various forms. BALTA's leadership by a social economy organization had a significant impact on the evolution of BALTA's administrative and governance structures. Although community partners are eligible to lead research programs, they need to undergo a rigorous approval process by SSHRC, which in the case of BALTA significantly impeded progress in the initial phase and required innovative structural adjustments. Hence, this case demonstrates that context and relations of power need to be acknowledged and taken into account if engaged scholarship is to truly fulfill the potential for equal participation and mutual benefit (Prins 2006).

Third, forming a research partnership between two professional cultures with different methodologies and goals is challenging. Common interests may bring the partnership together, but as the BALTA experience indicates, a good deal of time and effort is required to ensure that the research partnership is structured in a way that is sensitive to the context, needs, and objectives of all participants. It is also important to recognize, value, and incorporate the contributions of different participants, for example the formal research expertise of academics with the local knowledge, contacts, and mobilization strengths of practitioners.

Conclusion

This study moves the discourse beyond conventional structures and relations of power of institution-based civic engagement processes to an examination of the impacts of context, structure, and function in a practitioner-led research alliance. We support the view that there is a need to “break down barriers between academics and practitioners, encouraging mutual respect and building shared approaches” (Pearce et al., 2008, p. 23), but contend that changes in funding policies and in the assumptions about research partners’ participation, roles, and responsibilities would help to enable truly engaged and collaborative scholarship. We argue that funding agencies, academic institutions, and community organizations need to realize the value of engaged scholarship by working together to create more concrete and equitable forms of support and engagement. Existing barriers and boundaries of effective co-creation and mobilization of knowledge in the BALTA experience highlight the critical importance of recognizing and examining the diversity of research partnerships forming under the rubric of engaged scholarship.

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