

Social Economy & Sustainability Research Network –  
Atlantic Node

**Policies that support bridging, bonding  
and building between government and  
the social economy in Atlantic Canada**

Policy Scan Process Report 2009



**Social Economy and Sustainability Research Network**  
**Partenariat sur l'économie sociale et la durabilité**  
Bridging, Bonding, and Building / Renforcement des liens et des capacités

## **Policies that support bridging, bonding and building between government and the social economy in Atlantic Canada: Policy scan process report, 2009**

This report is part of the policy scan and inventory research undertaken as part of the Social Economy Research and Sustainability Research Network (Atlantic Node). The work is carried out under Sub-Node 1 and aims to document and provide an overview of government policies and programs that interconnect with non-profit and co-operative enterprise activities in the Atlantic region.

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## Introduction & Background

The research for policies that support bridging, bonding and building between government and the social economy in Atlantic Canada is in two parts. First, an initial scan of legislation and policy related documents resulting in an inventory of relevant materials and resources. This includes:

- production of an annotated bibliography of research documents and papers looking at various aspects of policy and policy development and process including those that provide working definitions around key concepts, for example, 'policy', 'social economy', 'social capital'
- annotated listings of related websites
- an inventory of government policies, statutes and programs at federal, provincial and municipal levels.

This phase of the research includes working papers and discussion documents relating to an overview and analysis of findings to inform the second part of the research program.

This first phase of the research helps to form a foundation looking at theory and concepts of the social economy, frameworks for regulation, and the drivers and development of relationships between government and social economy organizations (co-ops, voluntary sector and member-based organizations, and social enterprises). The second phase will link theory and frameworks for interaction (including co-production and co-construction opportunities in relation to inclusion of social economy organizations in public policy creation and implementation) and to look at theory in practice. This can only happen by examining and working with individuals and organizations working 'in the field'. Interviews and/or focus groups with key respondents in the provinces and production of case studies will support the identification of the scope and types of engagement around policy issues.

A review of some of the available literature and policy scan reports to-date indicates a concentration on substantive or administrative policy and relations. This includes program-focused, funding relationships and accountabilities, and/or issue based concerns (e.g. employment, social exclusion and services for specified groups) often, but not always, in relation to resourcing and service delivery (Caledon Institute, 2007). Many of these reports identify issues common across sub-sectors of non-profit organizations (e.g. changes in funding regimes, changing jurisdictions and downloading of public programs) and identify good practice approaches in relation to, for example, single issue concerns (e.g. child care, elder care, learning

disabilities, housing, drugs and alcohol services); communities of interest (Native communities, migrant and immigrant workers); and in relation to transaction relationships (often bi-lateral and concerned with service delivery, contracts, funding, accountability). Part of the analysis of a policy environment is to look for opportunities to build on these kinds of relationships and good practice examples. [Appendix A](#) outlines a basic typology of relationships around policy development and implementation.

As such, the key focus points in the second part of the research are the conditions, contexts and relationships that contribute to and facilitate non-profit and social economy organizational involvement in public policy dialogue and development (VSI, 2003) and purposeful relationships between and across sectors. These “purposeful relationships” or active alliances are often multi-stakeholder: public, private, non-profit sectors and social economy organizations; different levels of government and shaped by broader civil society concerns, mixed economy of care, regeneration and stakeholder involvement and a growing emphasis on social economy and social enterprise. This second phase of the research would involve engaging with key respondents to identify good practice examples, gaps and opportunities for collaboration and inclusive approaches to engagement and involvement linked to improved policy planning and decision-making.

The aim of the research project as a whole is to contribute to the following objectives:

- a. *To seek to develop a meta-analysis of current policy scans and policy implications arising from recent and current research, including those focusing on issue specific themes (e.g. inclusion, food security).*
- b. *To develop and apply categorisation frames based on the Network’s stated social capital concepts of bridging, bonding underpinning social economy activity and to look at policies in terms of how they:*
  - *do/or have the potential for inter-sectoral collaboration and co-operation*
  - *acknowledge interdependence in a mixed economy of care in delivery of a range of services and community development activities*
  - *provide a springboard or platform for co-construction, co-production, implementation and evaluation of social and economic policies.*

*This would, by necessity also include examination of sustainability and capacity building of non-profit sectors as well as examination of the developing concepts of the social economy and social entrepreneurship.*

Leading from these aims are a number of questions which link to both parts of the research project:

1. How are differing understandings of the social economy reflected in existing government policies?
2. What are the consequences of these differing understandings in terms of governance and policy frameworks?
3. What types of relationships exist around policy development and implementation?
4. What policy needs are not being met and what changes are required in the regulatory environment to meet these gaps and enhance collaboration between SE sector organizations and governments?
5. What conditions, contexts and relationships exist/need to exist which promote and facilitate non-profit sector involvement, for example, in policy deliberation, production and implementation

## **Focus of this report**

The focus of this report is on the initial phase of the research: the policy scan and inventory. This initial phase consisted of desk based research to identify information publically available through government and other agency websites as well as more traditional academic routes for literature reviews and searches (bibliographic, journal and research databases).

A research assistant, Chase McGrath, was employed to undertake a systematic scan of government Acts (statutes) and bills, regulatory frameworks and policies that related to aspects of the social economy, provided infrastructural support or guidance and/or provided a framework or platform for government-social economy sector relations, dialogue, discussions or jointly-planned delivery of services. This information was collated and stored in a basic, searchable spreadsheet that can be the basis of a more user accessible and searchable database. Other materials and information, such as web addresses, specific reports related to policy were collected as part of the process of the research and recorded in bibliographic software providing

the opportunity to produce an annotated bibliography of resources. All materials will be housed at the Mount Saint Vincent University in Halifax Nova Scotia, as part of the Social Economy and Sustainability Network's web, library and archive resources. See:

[Appendix B](#): Record of search sources used to create policy inventory and annotated bibliography

[Appendix C](#): Key words for identification, classification and search

[Appendix D](#): Sample spreadsheet entries

[Appendix E](#): Sample annotated bibliography entries

## **Public policy as a focus for inter-governmental and government-social economy sector relations**

Brown (2005) notes that “[t]rends in government finance and policy in Canada and elsewhere indicate an enhanced future role for the social economy (SE) [with] responsibility for social services (e.g. in health, immigration) increasingly devolved from federal to provincial; provincial to municipal; and municipal to community level” (p4). At the same time, there are continuing and emerging pressures (e.g. credit and financial crises, rural decline, globalization) that require collaboration among governments as well as participation of social economy organizations to “[combine] insights and actions of multiple actors learning about what works in particular places, and how to make it happen “on the ground”” (Bradford, 2005, p4). This recognises the need to promote both informal and formal networking opportunities between government and non-governmental organizations and actors who may have different, but inter-connected and interdependent interests, and which supports the democratisation or equalisation of these relationships, that is reduces the (perceived and actual) power divide between government and civil society participants (Coleman, 2004).

In the same way that we might look for a co-ordinated approach to policy development, implementation and evaluation at different government levels, committee members from the Atlantic node of the Social Economy and Sustainability Research Project proposed a ‘joined-up’ approach to a review and evaluation of policy production, implementation and impact by managing a program of research that would include all provinces in the Atlantic region. This overview and analysis from the inventory and scan is documented in the following report: *Public Policy and the Social Economy in Atlantic Canada: in inventory of jurisdictional policies, programs*

*and activities that support social economy organizations at municipal, provincial and federal levels.*

While the main focus has been to document public policy as it relates to Atlantic Canada, a national overview is necessitated to give a broad context and, as Carter, Plewes, & Echenberg (2005) note, to take account of situations where a locally based organization may be working at a national policy level because of the “anomalies of the division of powers among levels of government” (p5). Some of this contextualization and analysis of differently constructed relationships as part of collaborative or joint working processes is provided in the working paper: *Deliberation, Design, Development, Delivery: identifying avenues for policy dialogue between government and social economy organizations: initial findings from Atlantic Canada.*

In their guide for policy research, the Policy Research Initiative (2005) cite Lévesque and Mendell (2004) in highlighting the need for descriptive research and data development. They note that renewed interest in social economy and social enterprise (in Europe) was in part due to research and academic activity to “identify the common characteristics of co-operatives, mutual societies and associations” (p 13) and the subsequent (albeit variable) definitions and incorporation of social economy in to legislation and regulatory frameworks. Furthermore, PRI also report that governments looking to support the development of social economy organisations have been reconsidering their regulatory frameworks and suggest that there are lessons to be learnt from these actions from in Canada (most notably Québec) and outside of Canada (PRI, 2005).

However, from an initial review of 2003 inventory of policies related to community economic development (Infanti, 2003), there appear to be few (albeit significant changes) in the policy environments of the Atlantic Provinces. The significant changes would include appointment of ministers for the voluntary and community sectors in New Brunswick and Newfoundland and Labrador. Interestingly, there are well-established development agencies in these two provinces, which have been central to developing and sustaining policy input and dialogue and which could be seen as contributing to the development of these two government posts. In contrast, Nova Scotia, which has the highest concentration of non-profit organizations (Rowe, 2006) has a nascent local voluntary sector development agency resulting in a nascent, albeit developing governmental interest in the voluntary and community sector although with an emphasis on volunteers. Prince Edward Island does not have an equivalent coordinating or umbrella agency

for the voluntary and non-profit sector. Nova Scotia also has a Co-operative Development agency

From previous research and current practice experience, there have been identified problems with definitions and terminology. For example, CCEDNet's definition of community economic development, as defined in its National Policy Framework, was not found to be shared or reflected by provincial and territorial governments that have created departments with mandates to support CED. Often the social and environmental goals of enhancing social conditions in communities were neglected in favour of focussing on "economic development locally" (Infanti, 2003, p 82). This raises issues of government support by default rather than through design.

Similarly, Social Development Canada (2004) noted from their experience of sector involvement in departmental policy development that "policy development was interpreted broadly to include policy planning, formulation, program design, delivery, monitoring evaluation and lessons learned" (p ii). While this broad definition was useful to the project overall on an operational level, "conceptually it did not however mean the same thing to each of the players and lacking a clear definition of the role of non-government players in policy development, the result was a wide range of quite different expectations" (ibid, 2004, p ii).

In many ways, this is to be expected as the concept of the 'social economy', "introduced to the Canadian policy agenda in 2004" (Neamtan & Downing, 2005), has developed and changed with the introduction of new actors and new organisational forms, for example social philanthropists, for-profit social enterprises, social and community entrepreneurs and collective entrepreneurship including initiatives such as fair-trade towns and green villages. While acknowledging the complexity of the issue and the debates that exist on definitions, it is appropriate, then, to revisit the boundaries and the scope of the social economy as it related to Atlantic Canada<sup>1</sup>. These issues are covered more fully in a series of brief "In Search of..." definitions documents on public policy, social economy, social capital and in two working papers: *Mutual (Mis-) Understandings: exploring the boundaries of social economic activity in Atlantic*

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<sup>1</sup> We have resisted including a definition at this point. This will be discussed further in the definitions paper 'social economy'. However the Atlantic Node suggests that: "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" (Brown, 2008 available at <http://www.msvu.ca/socialeconomyatlantic/English/whatisE.asp>)

*Canada, together with Discovering the ‘public’ in public policy: identifying policies and policy frameworks that support development and engagement of social economy organizations in Atlantic Canada.*

## **Methods and processes of the policy scan**

The work carried out during 2008 consisted of secondary research utilizing publicly available spaces and resources, such as:

- government websites and literature (federal, provincial and municipal)
- social economy development agencies and apex organization sites and literature (e.g. Co-opZone, Canadian Co-operatives Association, La Fédération acadienne de la Nouvelle-Écosse, Community Services Council Newfoundland & Labrador)
- Academic and non-academic research centres (e.g. Caledon Institute of Social Policy, Canadian Policy Research Networks, Centre for Voluntary Sector Research and development – Carleton & Ottawa universities)
- Academic/library search databases (e.g. Ingenta, Emerald and search facilities at Nova Scotia university libraries)
- Web-based search engines (e.g. Google, Google Scholar)
- International sources (e.g. International Co-operative Alliance, European Research Network, Aspen Institute, CIRIEC International)
- Canadian partners in social economy sites (e.g. BC-Alberta Research Alliance on the Social Economy - BALTA, the Canadian Social Economy Hub)

An initial trawl of the Atlantic Nodes was carried out to collect available data and information on policy-related publications and reports although little was available at the time of collection (see [Appendix F](#)). After discussion with colleagues from BALTA who were carrying out similar work, the focus centred on collection of government data and materials. This was the main task of the appointed research assistant who systematically undertook a scan of federal, provincial and municipal departmental documents to produce a searchable spreadsheet of information. However, a renewed scan of policy links across the nodes will be carried out during 2009: *SES Research Network Policy Threads Inventory and Analysis*.

In addition, ‘grey’ literature was sought such as annual reports or publicity leaflets, unpublished reviews and briefings, and news releases.

For the purposes of data collection, social economy organizations include:

- Co-operatives – market (including profit distributing companies) and non-market (non-profit distributing or non-profit), which includes consumer co-operatives, worker co-operatives and stakeholder co-operatives.
- Umbrella or membership organisations and networks/associations of organizations
- Voluntary sector development agencies
- Local and regional voluntary organizations and associations and national organizations, some with local branches
- Volunteer, self help and community groups
- Clubs and societies
- Credit unions/caisses populaires
- Social enterprises and social firms

The Alberta/BC inventory includes legislation and regulatory frameworks as well as programs arising from such frameworks. Following this route, the initial scan of Atlantic policy and policy frameworks was fairly broad and reasonably indiscriminate in recording a range of legislation and regulations. This was later refined and partially annotated to enable an analysis and categorization of types of policy, policy development and engagement or potential points of engagement with social economy organizations around issues. This supports the development of a more critical evaluation in terms of considering examples of, or potential leverage for, purposeful relationships between the sector and government and opportunities for horizontal collaboration and active alliances as opposed to operational and transaction relations, which are often bi-lateral, linked to funding regimes and contracted work and service level agreements.

It is important to take note of the latter since this offers opportunities for input into design and delivery of services and well as evaluation and accountability of service provision by government and social economy organizations. However, purposeful relationships, as mentioned earlier, involve more strategic collaborative processes that recognise the benefits of interdependence between sectors for problem solving. This can lead to greater opportunities for co-construction and evaluation of social and economic policies and allow for broader connections with concepts such as social inclusion, building social capital, and capacity building in relation to individuals, social economy organizations and local communities. Examples of purposeful relationships at

federal and provincial levels for example, would include multi-stakeholder involvement in the development of frameworks and models for relationship development and good practice such as the Accord (federal) and Newfoundland and Labrador's Strategic Social Plan 2000-2004 (provincial).

Policy and policy making is generally seen to be the primary role of governments in terms of legislation and procedures for operation and regulation of, for example, social and human service organizations and the services provided. Yet if public policy and the process of creating and deciding upon public policies that best fit "the interests of all members of society" as Torjman (2005, p 4) suggests, then it is appropriate to also consider other commentators on public policy and the processes by which decisions are made. To take account of this, the policy scan also included non-governmental sources such as academic and non-academic research centres that focus on social and public policy and, indeed, policy alternatives. This also helped to identify other policy scans (often related to specific themes) and bibliographic references (for example, Abbot 2006; Bouchard et al, 2003; Daoust et al, 2003; Légère, 2005; Thompson, 2006).

## What a policy scan can tell us

The process of carrying out the scan allows us to identify a number of things, which together form a base line assessment of 'current' legislation, programs, proposed new work and strategies at different levels of government and which can then be used to monitor future developments. It also provides for the assessment of proactive and/or reactive engagement in policy development by both those within and outside of government. Furthermore, it gives a platform to assess espoused philosophies and strategies outlined in government department plans and statements with activity at a community level (phase two of this research project).

Mapping policy developments also gives insight into the changing priorities and language used by successive governments in relation to the diverse sectors or the social economy. It can provide a timeline for the acceptance and embedding of concepts – the move from marginal to mainstream (such concepts would include social economy, social capital, social enterprise, venture philanthropy, and social entrepreneurship). This also links to the visibility of certain sectors – volunteerism over (paid) voluntary sector; third sector as non-profit with co-operatives perceived as separate entities (which the concepts of the 'social economy' and 'social enterprise'

address to a certain extent – albeit the former more so than the latter). These observations also link to the generation and development of sectors in different localities and jurisdictions.

The scan can also highlight departmental responsibilities for aspects of the social economy; and to assess consistency of relationships within one level of government and across governments. The lack of a unifying central department with responsibility for social economy organizations can mean, for example, a mix of jurisdictional responsibilities and can result in a lack of strategic development in relation to government-sector relations and cross-cutting issues that effect more than one government department and or level of government.

A government department handling social economy affairs at Federal level may not be the same as at Provincial level and may vary from province to province. For example, the Co-operatives Secretariat at Federal level sits within the Department of Agriculture and Agri-Food Canada. Information about registration and co-operative status/identity in New Brunswick can be found on the Canada Business New Brunswick site ([www.enterprisecanada.ca](http://www.enterprisecanada.ca)); to register co-ops will contact Service New Brunswick and if they want information about tax issues they can contact Industry Canada in Ottawa. On Prince Edward Island registration of a co-operative is handled by the Inspector of Co-operatives, Consumer, Corporate & Insurance Services Division of the Office of the Attorney General in Charlottetown; in Newfoundland and Labrador the Registry of Co-operatives is found within the Department of Government Services (Commercial Registrations Division). In Nova Scotia registration of non-profits, provincial charities and co-operatives is via the Registry of Joint Stock Companies, via Service Nova Scotia and Municipal Relations. Co-operatives can also access advice and information via Service Nova Scotia and Municipal Relations: from the Inspector of Co-operatives, Co-operative Branch. Nova Scotia also has a second tier co-operative development agency for the province – Nova Scotia Co-operative Council with three offices across the Province (Truro, Sydney and Yarmouth). The Council has representatives of co-ops from across the Province and the Department of Economic Development's director of Community and Rural Development is ex officio member of the Board.

Similarly, the Voluntary Sector Initiative: Social Involvement in Departmental Policy Development (SIPD), a highly significant five-year initiative launched by the Government of Canada in 2000 with an investment of millions of Canadian dollars highlighted a number of issues. In regard to departmental responsibility and remit, the Voluntary Sector Task Force

responsible for overseeing the initiative was housed initially with the Privy Council, transferred to Canadian Heritage and ended its life in the newly created directorate, Social Development Canada (Social Development Canada, 2004). Tracking policy initiatives, in this way, gives an insight into the success and challenges faced by collaborative working arrangements.

Scanning for program developments can highlight changing and volatile environment policy environments. For example, a significant series of events, commented on by particularly non-profit organisations since the major government funding cutbacks in the mid-1990s, can be seen in the varied and short-term nature of programs and funding initiatives. This illustrates a move away from core and long-term funding and grants to short-term projects and contracts (for example, Eco-Action Community Funding Program - projects up to a maximum of 2 years, and “initiatives”: Canada Volunteerism Initiative (2001-2006; CVI Nova Scotia 2003-2006); Co-operative development Initiative (2003-2009 will calls to extend and renew after this time); Innovative Communities Fund (5-year initiative). This latter fund has been significant in supporting the development of new co-operative ventures. For example, Prince Edward Island does not currently have a midwifery service and there are no plans for an in-Province Service. The Co-operative Development Agency funded the Birth Options Research Network (a volunteer-run group) to carry out a feasibility study to set up a women’s health co-op and birthing centre in PEI (Women’s Network PEI: <http://www.wnpei.org/midwifery.html>)

Other areas that can be identified is commitment to working in partnership or engagement of individuals, associations, communities (via action plans, regulations, annual reports and accountability statements), examples of joint working (for example, through roundtables and task forces) and . Examples include:

- Newfoundland and Labrador: Violence Prevention Initiative, Women’s Policy Office, Government of Newfoundland and Labrador: community partners make up a Community Advisory Committee; take part in community partners take part in and may co-ordinate and/or chair regional co-ordinating committees, and the Department has links to a range of community-based partners.
- New Brunswick: premier’s Task Force on the Community Non-Profit Sector undertook a process of consultation during 2006 and published its ‘Blue Print for Action (Bradshaw Report, 2007). This in turn led to the development of a Secretariat and ministerial brief for Community Non-Profit Organizations

- Nova Scotia: in 2008, the Nova Scotia Volunteer Advisory Council was established aiming to bring together members of volunteer and voluntary organizations with government to develop action plans to address key issues affecting volunteers. The Council will meet four times a year with The Minister for Volunteerism.
- Prince Edward Island: The Premier's Action Committee on Family Violence established in 1995 for a five year term and consisted of 18 community and 5 government representatives. The remit of the committee was renewed in 2001 to complete a further 5-year plan.

## Final comments

The stage of the research directly links with the Social Economy & Sustainability (SES/ESD) project themes of policy inventory and analysis. The scan has collated over 300 policies, programs and policy documents from across the four provinces that directly and indirectly impact on the sector and sector organizations. The majority of the data relates to transaction relationships between government and the sector and widespread connections between agencies and departments often on a bi-lateral basis (by organization or by sector industry). However, there are examples of partnering to review and develop implementation/delivery strategies (co-production of policy) as well as significant potential for deliberation, planning and designing (co-construction of policy and service responses). The level of consistency, continuity and influence of these relationships is not known from this initial part of the research and will be open to exploration in the second phase of the research.

The search has also generated a resource of over 350 references and additional web resources of both government and non-governmental sites and information. This supports the development and application of categorisation frames based on the SES/ESD primary aims of bridging, bonding and building, that is to look at policies in terms of how they do/or do not have the potential for inter-sectoral collaboration and co-operation; how they may/may not acknowledge interdependence in a mixed economy of care in the delivery of a range of services and community development activities; and how they might provide a platform for co-production, co-construction ( as seen earlier), implementation and evaluation of social and economic policies.

[Appendix G](#) gives a list of outputs from this stage of research.

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A basic typology of relationships around policy development and implementation

The classification below looks at types and characteristics of relationships identified in practice, the drivers that create and support the development and maintenance or renewal of these relationships and examples from the literature/practice (actors, processes and structures). Please note SE = social economy

Type	Drivers	Actors	Processes and Structures
Bi-lateral and Transaction relationships	<p>Shaped by specific needs of both government and non-profit/SE sectors: often relationships between one SE organization and one government department or one sector (e.g. transition housing schemes) and one government department (e.g. Department for Community Services in Nova Scotia)</p> <p>Context: funding environments, evaluation of services, accountability</p> <p>Level of relationship: usually uni-directional (government to SE organization), occasional opportunities for feedback; information/resource allocation: informing, consulting, even placatory (e.g. funding cut-back)</p> <p>Associated language e.g. : Value added/ adding value; accountability,; transparency; best value; quality and accountability; results-based management; outcomes assessments; evidence-based results; sustainability/capacity building (funding, employment)</p>	<p>Key officer(s)-sector relationships e.g. Community services, Public health Privatisation of public services e.g.</p> <ul style="list-style-type: none"> <li>• Volunteer BC</li> <li>• Calgary Chamber of Voluntary Organizations</li> </ul>	<p>Contracts Service level agreements Commissioning and tender arrangements Review and network meetings (sector specific) Themed meetings e.g. contract changes; funding; procurement</p>
Single issue concerns (bi-lateral, special interest coalitions and social movements)	<p>Broad and narrow consultations, engagement and relationships around for example volunteering, child care, disability, elder care, learning disabilities, drugs and alcohol services, mental health etc; enhancement of services. Often still one sector with one or more departments</p> <p>Context: policy impacts, funding regimes, action planning, strategy development</p> <p>Level of relationship: consultation, negotiation, advocacy; opportunities for active alliances and collaborative work in some instances</p> <p>Language e.g.: Inclusion; collaboration; consultation; engagement; marginalised communities; addressing inequalities</p>	<p>Health, Social, Community and human services organizations; environmental; community and special interest groups (e.g. Aboriginal human rights organizations); research foundations; national single issue organizations (e.g. Arthritis Society) e.g. Canadian Policy Research Network Inc (also above)</p>	<p>Special interest networks and fora; scenario planning; planning for real events (some of these may overlap or link in to purposeful relationship processes); service delivery contracts e.g.</p> <ul style="list-style-type: none"> <li>• Alberta: Scenario Planning Workshop</li> <li>• BC: Future of the voluntary sector in BC – volunteer/voluntarism</li> <li>• Nova Scotia: Government-Non-</li> </ul>

Type	Drivers	Actors	Processes and Structures
			Profit Relationship Study – Community Services/Services for adults with intellectual Disabilities (College of Continuing Education, Dalhousie University)
Purposeful relationships or Active Alliances (often multi-stakeholder: public, private, non-profit sectors; different levels of government)	<p>Cross-cutting themes and horizontal relationships – need for ‘joined-up’ thinking and problem-solving.</p> <p>Context: shaped by broader civil society concerns, mixed economy of care, regeneration and stakeholder involvement; later emphasis on social economy and social enterprise. Can be top-down i.e. federal government requirements on provincial government departments</p> <p>Level of relationship: collaborative, active alliance and partnership, solution-driven, can lead to delegation of responsibility to participating partners.</p> <p>Language e.g. :            Regeneration, active communities, vibrant communities; sustainability, social capital; democratic deficit; third way; middle way; promotion of ‘independent’ sector; capacity building; scrutiny; active citizenship; local management of services; healthy communities; quality of life; third sector; third pillar; third leg of stool; modernisation of public sector provision</p>	<p>Apex and third tier organisations e.g. national and local development agencies; rural development agencies; non-profit professional bodies e.g.</p> <ul style="list-style-type: none"> <li>• Alberta Nonprofit and Voluntary Sector Initiative (ANVSI) – provincial: propose ANVSI Council (memberships to include ECVO/CCVO) and lead ministry</li> <li>• BC Social Economy Round table (operates in all 3 arena)</li> <li>• PolicyLink NB</li> <li>• N&amp;L: Community Services Council</li> </ul> <p>Also at local levels to facilitate local management of services, community asset building.</p>	<p>Frameworks e.g. Compact, Accord            Policy review at central and local levels of government            Strategic Partnerships            Policy task groups/experts groups e.g.</p> <ul style="list-style-type: none"> <li>• BC: Building Bridges (Singer/Centre for Non-Profit Management)</li> <li>• Alberta: rationale for a framework agreement between government and voluntary sector</li> </ul>

## Appendix B

Record of search sources used to create policy inventory and annotated bibliography

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### Databases and web resources

<b>Libraries</b>
<b>Bibliographic Databases</b>
<b>Review of Relevant Journals</b>
<b>Government Sources</b>
<b>Non-government/community based sources</b>
<b>Research institute sources</b>
<b>Search engines</b> <a href="http://www.google.com">www.google.com</a> <a href="http://www.scholar.google.com">www.scholar.google.com</a>

### Example key words used for searching

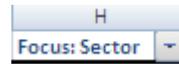
Public policy	Social economy	Social capital	Partnerships
Provincial	Social movements	Equity/inequity	Consultation
Federal	Social purpose	Social justice	Collaborative
Municipal	organisations/business	Community	working
Regional	Co-operatives	networks	Cross-sector
Urban	Non-profit	Community-wide	
Rural	Third Sector	initiatives	
Social welfare	Regeneration	Community	
Vibrant Communities	Social/economic	Involvement	
	development		
	Community development		
	Sustainable Communities		
Research Methods			

## Appendix C

### Key words for policy identification, classification and search

Excel was used to store information as this provides a useful platform to transfer in to other software (e.g. access or other database) or as a basis for web-based tools (e.g. a wiki). Only one worksheet was used to record information and we used a basic search and filter system to be able to ‘shrink’ or ‘grow’ or sort into specific datasets (e.g. by Province). The data filter acts in the same way as a web-page toolbar with a drop down menu showing all the current search words. This means additional search words (rather than additional worksheets) can be added as the data collection develops.

Classification fields and breakdown of category information in each field.								
Identifier	Document D	Year	Source	Jurisdiction	Document	Focus	Focus	Retrieval
	Title/Name	Publication date	Author	Level/area	Type	Functional Area	Sector	Location held
# or code for document			agency	Federal	Annual Report	Aboriginal	Bi-lateral (e.g. service level agreement)	Endnotes
			department	Canada	Conference Proceedings	Capacity Building	Charities, small	Hardcopy
			individual	Provincial	Conference Report	Child & Youth	Charities, large	PDF
			organization	Atlantic	Consultation	Community Engagement	Charities, rural	URL (e.g. website details)
			sector network	Maritimes	Directory	Economic Development	Co-op For-profit	Word document
				New Brunswick	Discussion Document	Elder Care	Co-op non-profit	
				Newfoundland & Labrador	Evaluation	Faith based services	Co-operatives	
				Nova Scotia	Green Paper	Finance	Corporations non-share capital	
				Prince Edward Island	Issues Paper	First Nations	Credit Unions	
				Municipality	Legislation/Statute	Food Security/Safety	Cross-sector (partnerships)	
				HRM	Manifesto	Grants	Government (intradepartmental)	
				Other Provinces	Policy Scan	Health	Private enterprise	
				Alberta	Program	Housing	Public Sector	
				British Columbia	Regulation	Human Capital (training, development, leadership)	Social economy	
				Manitoba	Report	Immigration	Social enterprise	
				Ontario	Research study	Legal framework (e.g. definition, registration, incorporation)	Voluntary and community	
				Quebec	Resources List	Program framework (e.g. funding/finance program)	Volunteer	
				Saskatchewan	SLA/Service Contract	Project funds	Educational Institutions	
				NW Territories	Web page	Regional Development		
				Nunavut	Website	Regulatory framework e.g. (tax, reporting)		
				International	White Paper	Relationship building		
				Europe		Rural		
				UK		Social Capital		
				US		Social Development		
						Technical Assistance		
						Financial Assistance		
						Farm Business		
						Acadian/Francophone		
						Health Care		
						Education		
						Environment		

The image below represents a working view of the policy inventory worksheet. This shows a handful of the 300+ entries organized alphabetically (please note: does not contain all A-C entries) under the key headings. Each heading has a small down arrow at the side , this allows for basic searching and filtering. The red triangle at the corner of the 'document details' column shows the presence of a 'comment', which gives a small amount of detail on the document and its relevance. An open comment is shown at the bottom of the image as a blue text box.

Identif	Document Details	Year	Source	Jurisdiction	Document Type	Focus: Functional	Focus: Sector	Retrieval	Notes	
212	Aboriginal Affairs Secretariat Grants Pro	2008	Aboriginal Affairs Secretariat	New Brunswick	Grant	Aboriginal, First Nations, Social Development	First Nations, Aboriginal, non-profit	URL	Current to October 27, 2008	http://app.infoa.7700.
	ACOA Act	1988	Atlantic Canada Opportunities Agency	Atlantic Canada	Statute	Economic Development	private, community, co-operatives	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/005
	Advancing Canadian Agriculture and Agr	2004	Agriculture and Agri-food Canada	Federal, Canada	Program	Farm Business, Economic Development	Co-operative, non-profit, social economy, private enterpr	URL	March 2003; proposals to exte	http://www4.agr.gc.ca
66	Advisory Council on the Status of Women	1983	Advisory Council on the Status of Women	Nova Scotia	Legislation/statute	Social Development, women	Government, public, private, community	URL	Current to October 27, 2008	http://www.gov.ns.ca/f
124	Advisory Council on the Status of Women	1975	Status of Women	New Brunswick	Legislation/statute	Social Development, women	Government, public, private, community	URL	Current to October 27, 2008	http://www.gnb.ca/006
194	Affordable Housing Program	N/A	Department of Social Development	New Brunswick	Program	Housing, Financial Assistance, Social Develop	Social Economy, Non-Profit, Co-operatives	URL	Current to October 27, 2008	http://app.infoa.7700.
	Annual Report 2007	2007	Department of Post-Secondary Education,	New Brunswick	Annual Report	Education, Persons with disabilities	Public Sector	URL		http://www.hrfe.gov.nl.
329	Annual Report 2007-2008	2008	Department of Human Resources, Labour a	Newfoundland and Labrador	Annual Report	economic development, employment	government	URL	Current to October 27, 2008	http://www.ncapprenti
	Annual Report 2007-2008	008/03	Aboriginal Affairs Secretariat	New Brunswick	Strategy, annual report	economic, social development	First Nations, Aboriginal	URL	Current to October 27, 2008	http://www.benefitsblu
211	Blue Print for Action	2006	Community Non-Profit Organizations Secre	New Brunswick	Action Plan	Social Development, Program Framework,	Social Economy, Co-op Non-Profit,	URL, Endnotes	Current to October 27, 2008	http://www.intrd.gov.n
331	Budget Speech 08	2008	Executive Council Finance	Newfoundland and Labrador	Finance	cross departmental, economic development	government, voluntary & community	URL	Current to October 27, 2008	http://www.gov.pe.ca/f
260	Buildings Accessibility Act	1992	Department of Government Services	Newfoundland and Labrador	Legislation/statute	Persons with Disabilities	Public Sector	URL	Current to October 27, 2008	http://laws.justice.gc.c
306	Business and Market Development Progr	N/A	Department of Innovation, Trade, and Rural	Newfoundland and Labrador	Program	Economic Development, technical assistance	small business, social enterprise, co-operative	URL	Current to October 27, 2008	http://laws.justice.gc.c
213	Business Development Program	N/A	Department of Innovation and Advanced Le	Prince Edward Island	Program	Economic Development, Financial Assistance	Private Sector, Social Economy, Co-op Non-Profit	URL	Extended until 2009	http://www4.agr.gc.ca
1	Canada Cooperatives Act	1993	Dept of Justice	Federal, Canada	Legislation/statute	Legal framework	Co-operative	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/006
308	Community Capacity Building	N/A	Department of Innovation, Trade, and Rural	Newfoundland and Labrador	Program	Economic Development	Social Economy, Community Based Agencies/Organizatio	URL, Endnotes	Current to October 27, 2008	http://www.gov.ns.ca/c
	Community Development Policy Implementation Pr		Department of Economic and Rural Development						Current to October 27, 2008	http://www.gnb.ca/005
104	Community Economic Development Invest	1990	Department of Economic Development	Nova Scotia	Program	Economic Development, Regional Developme	Social Economy, Voluntary & Community	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/006
163	Community Economic Development Progr	N/A	Business New Brunswick	New Brunswick	Program	Economic Development, Capacity Building, Re	Social Economy, Public Sector, Private Sector, Municipali	URL, Endnotes	Current to October 27, 2008	http://www.gov.pe.ca/f
132	Co-operative Associations Act	1978	Department of Justice and Consumer Affair	New Brunswick	Legislation/statute	Legal Framework	Public Sector	URL, Endnotes	Current to Mar 2008; extende	http://www.agr.ca/lcs-
	Co-operative Associations Act (Revised)	2001		Nova Scotia	Legislation/statute	Legal Framework	co-operatives	URL	Current to October 27, 2008	http://laws.justice.gc.c
133	Co-operative Associations Regulations	1982	Department of Justice and Consumer Affair	New Brunswick	Regulations	Legal Framework	Public Sector	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/c
3	Cooperative Credit Associations Act	1991	Dept of Justice	Federal, Canada	Legislation/statute	Legal framework	Co-operative credit associations	URL, Endnotes	Current to October 27, 2008	http://www.gov.pe.ca/f
307	Co-operative Development	2005	Department of Innovation, Trade, and Rural	Newfoundland and Labrador	Program	Economic Development, Rural	Social Economy, Co-operatives	URL, Endnotes		http://www.coopscana
	Co-operative Development Initiative	2003	Co-operatives Secretariat	Federal, Canada	Program	Financial assistance, technical assistant	government, co-operatives, social economy	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/006
93	Cooperative Housing and Non-Profit Hou	N/A	Department of Community Services	Nova Scotia	Program	Housing	Co-operatives, Social Economy	URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/006
	Co-operative Perspectives for 2008 Fed	2008	Canadian Co-operatives Association	Federal, Canada	Platform, Manifesto	capacity Building, Economic Development, Fi	Co-operatives, Social Economy	URL, Endnotes	Current to October 27, 2008	http://www.assembly.n
267	Co-operatives Act	1998	Department of Government Services	Newfoundland and Labrador	Legislation/statute	Social Development	Public Sector	URL, Endnotes	Current to October 27, 2008	http://www.assembly.n
243	Co-operatives Associations Act	1976	Office of the Attorney General	Prince Edward Island	Legislation/statute	Legal Framework	Co-operative	URL, Endnotes		http://www.gnb.ca/006
	Credit Unions Act	1994	Attorney General	New Brunswick	Legislation/statute	Legal Framework	credit unions	URL	Current to October 27, 2008	http://www.gnb.ca/006
	CUDG Business Plan 2008-2010	2008						URL, Endnotes	Current to October 27, 2008	http://app.infoa.7700.
120	Cultural Activities Program	N/A						URL, Endnotes	Current to October 27, 2008	http://www.gov.ns.ca/f
121	Cultural Industry Growth Program	N/A						URL, Endnotes	Current to October 27, 2008	http://www.gnb.ca/006

The CUDG is a crown corporation reporting to the Minister of the Department of Government Services, who in N&L has responsibility for the regulation of credit unions. This report is prepared in response to the 2004 Transparency and Accountability Act. CUDG's stated mission is, by 2010, to have in place improved systems to facilitate credit union compliance with sound business practice through the improvement of the corporate governance of credit unions accompanied by new credit union act and regulations and information session delivered to credit union directors and management.

The two examples below show the recording format and detail the information available for each entry.

#### Example 1: literature

Author or authors

Title of document

Place of publication: publisher

Anderson, J. (2008). *Revitalizing Canada's Economy: co-operatives are part of the solution*. Pre-Budget Consultation Brief, Ottawa: Canadian Co-operative Association

Available to download from:

If available for download, access information will be provided

<http://www.coopscanada.coop/pdf/aboutcca/gapp/govsubmissions/CCApré-budgetconsultationbrief.pdf>

Summary information about the publication

This brief outlines how citizens can contribute to stimulating the economy in tough times using co-operative models of participation and for government to partner with co-operatives. The brief gives examples of co-operatives being set up or expanding: Intergated Grain Processes Co-operative; Battle River Agri-Ventures Co-op; and Northwest Premier Meat Co-operative. The brief asks for the renewal and expansion of the Co-operative Development Initiative; to encourage Canadians to invest in co-operatives via a Co-operative Investment Plan (following on from success in Quebec); to make investments in affordable housing; a Canada-wide poverty reduction strategy; increased international development aid; using the co-operative model as a method for sustainable agriculture and sustaining rural communities; to implement policies to promote community economic development; major investments in First Nations and aboriginal communities; increase the role of child care co-operatives; and, finally, to initiate a dedicated Community Environmental Fund to help to fund projects in renewable energy and other environmental protection projects. John Anderson is the Director of Government Affairs and Public Policy at Co-ops Canada.

Key words: Canada, economic crisis, co-operative, policy

Key search words

#### Example 2: Web- pages and sites

Author or organisation

Title of web page

Date web page updated or copyright date

ARUC Économie Sociale (2008). Home page.

<http://www.aruc-es.uqam.ca/Accueil/tabid/36/Default.aspx>

Web page address (URL)

Based at the Université du Québec à Montréal, the work of ARUS-ES links university researchers with community partners around research specifically related to the social economy. The website details research, resources and events.

Summary information on page or site content

Keywords: academic institution, research, social economy

Key words

SES/ESD Research Network sub-node research projects linked to implications for social and public policy.

Sub-Node 1 (highlighted in blue) denotes the sub-node under which the policy scan is undertaken (*italics*). The projects highlighted in bold show broad, more structural links for policy development, rather than single issue or theme specific issues.

<b>Social Economy and Sustainability Research Network – Atlantic Node</b> <b>Sub-Node research projects linked to implications for social/public policy</b>	
<p>“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.”                      (L. Brown, MSVU, 2008)</p>	
<p>Sub-Node 1: Mapping &amp; Policy Analysis</p>	<ul style="list-style-type: none"> <li>● Survey of co-ops &amp; credit unions(NB) – contribution to regional economy; inform public policy on regional economic and community development                             <ul style="list-style-type: none"> <li>○ Preliminary analysis profile of 296 organizations</li> <li>○ Acknowledges co-ops as significant player in the social economy in Atlantic Canada</li> <li>○ Government legislation, policies and regulations need to take account of the realities and cultures of co-operatives.</li> </ul> </li> <li>● Fishing for the future – case study of Coastal Communities Network</li> <li>● Les politiques gouvernementales comme support aux organismes communautaires de gestion viable des groupes de bassins versants: analyses des politiques et recommandations</li> <li>● Contribution de l’ancienne et de la nouvelle économie sociale au développement de la communauté de communautaires au Nouveau-Brunswick</li> <li>● <i>Policies that support bridging, bonding and building between government and the social economy in Canada: preliminary stage of Atlantic-wide public policy scan and policy evaluation</i> <ul style="list-style-type: none"> <li>○ <i>Inventory of policies and programs at federal, provincial (4 Atlantic provinces) and municipal levels – database and report</i></li> <li>○ <i>Scan of sub-nodes re policy links</i></li> <li>○ <i>Production of annotated bibliography from use of literature on policy, social capital, social economy linked to community-government relations and policy influence and structures/frameworks</i></li> <li>○ <i>Working papers (TBC)</i></li> </ul> </li> </ul>
<p>Sub-Node 2: Inclusion &amp; Empowerment in the Social Economy</p>	<ul style="list-style-type: none"> <li>● Focus on marginalized groups on PEI                             <ul style="list-style-type: none"> <li>● Youth: case study; identity building</li> <li>● Family Violence – improving services</li> <li>● Women:                                     <ul style="list-style-type: none"> <li>○ rural women’s entrepreneurship (case study of existing co-op);</li> <li>○ parental rights- policy on maternity and parental benefits: (summary report) highlights inequities in maternity and parental benefits available under Employment Insurance Act. Recommends action on eligibility, flexibility, length and value of</li> </ul> </li> </ul> </li> </ul>

	<p>benefits, employment protection and access to information. Federal government to:</p> <ul style="list-style-type: none"> <li>▪ extend eligibility for maternity and parental benefits by changing qualifying requirements</li> <li>▪ create a menu of options which offer flexibility to meet the changing nature of consumers, businesses, and families</li> <li>▪ eliminate the two-week waiting period and add an additional two weeks of paid maternity leave</li> <li>▪ improve wage replacement for maternity and parental benefits by increasing weekly payable benefits; increasing the maximum insurable earnings; increasing family supplement rate; and increasing low income threshold</li> <li>▪ undertake consultation with provinces and territories to establish national standards for employment protection as it relates to maternity and parental leave</li> <li>▪ ensure availability of claimant advocates with expertise in maternity and parental benefits throughout designated federal government offices</li> <li>▪ Undertake research and gender analysis into a continuum of care model for a national caregiver strategy which meet the needs of all Canadian families</li> </ul> <ul style="list-style-type: none"> <li>• <b>Community accounts: governmental infrastructure supports for community accounts</b> – measurement of quality of life (based on N&amp;L) <ul style="list-style-type: none"> <li>○ Collect information through surveys on what constitutes quality of life</li> <li>○ Present information to communities along with other statistics</li> <li>○ Enable communities to make informed decision making and to influence policy development processes</li> </ul> </li> <li>• Immigrants: <ul style="list-style-type: none"> <li>○ Chinese immigrant experience: report to inform immigration services: repeat the 1991 Race Relations in PEI survey; develop programs for newcomer youth; begin collection of local immigration data; carry out longitudinal research</li> <li>○ Immigrant health professionals – access to employment</li> </ul> </li> <li>• Adults with learning challenges: Report to Literacy alliance of PEI: <ul style="list-style-type: none"> <li>○ need for education on learning disabilities for professors in universities</li> <li>○ awareness of the implications of the Charter of Rights and Freedoms for academia</li> <li>○ identify learning disabilities earlier in the K-12 experience;</li> <li>○ Provide accommodations early in school careers and document</li> <li>○ Develop accessibility services in all universities to provide consistent services in line with national guidelines</li> <li>○ Appropriate counselling for students as well as mentoring and buddying schemes and career counselling.</li> </ul> </li> <li>• <b>Mapping supports – determine influence of government policy and programs on social economy (Wynne report)</b> <ul style="list-style-type: none"> <li>○ Focus on funding and policy environment</li> <li>○ Unstable and inadequate funding: cost-cutting culture and changing governmental priorities</li> <li>○ Social economy organizations perceive they have little influence in public policy process particularly at Federal levels</li> <li>○ Need to refocus funding criteria and public policy on the needs of the people that the social economy services</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"> <li>○ Develop stable funding programs</li> <li>○ Improve and streamline communication processes and develop institutional infrastructure</li> <li>○ Provide opportunities for stakeholder accountability for all involved in provision of social programs</li> <li>○ Provide networking opportunities to promote sense of community and 'islandness'</li> <li>○ Develop partnerships and collaborative efforts of social organizations, government and communities to problem solve</li> <li>○ Recognise the need for social economy organizations to have an on-going role in policy development</li> <li>● Fair Trade – fair trade practice – community engagement (PEI pilot) <ul style="list-style-type: none"> <li>○ To develop a model that can be replicated in other parts of Canada</li> <li>○ Strategies for addressing food security: community kitchens and other community-driven initiatives, farmers' markets.</li> <li>○ Lack of resources for organizing and developing initiatives</li> <li>○ Regulations perceived to give more freedom to corporate interests over the interests of the local communities</li> <li>○ Policies needed that support fair trade in food</li> <li>○ Adopt a Domestic fair Trade (US) approach which recognises the rights of farmers to produce food in a sustainable way, and creates just structures for production, distribution and access to food</li> </ul> </li> </ul>
Sub-Node 3: Food Security and CED	<ul style="list-style-type: none"> <li>● Food Box Program – evaluation and recommendations for expansion of the program aimed initially at pre- and post-natal women facing barrier such as low income. Fits with Health promotion policy and strategies.</li> <li>● Food security – Annapolis, Kings &amp; Hants counties – policy recommendations</li> </ul>
Sub-Node 4: Mobilization for Natural Resources and Livelihoods	<ul style="list-style-type: none"> <li>● Forestry (NB)</li> <li>● Agriculture</li> <li>● Aquaculture</li> <li>● Medicinal herbs and plants – risk from climate change</li> <li>● Mi'kmaq co-operatives</li> </ul>
Sub-Node 5: Financing & Measuring Performance in the Social Economy	<ul style="list-style-type: none"> <li>● Evaluating social economy organizations (case study of independent school – balanced scorecard)</li> <li>● <b>Diagnostic &amp; evaluation tool, development of</b></li> <li>● <b>Provision of finance to social economy organizations – policy implications</b></li> <li>● Fogo Island co-op (case study)</li> <li>● <b>GAAP &amp; co-op accounting</b></li> <li>● <b>Measuring co-operative difference</b></li> </ul>
Sub-Node 6: Communication Practices & Tools	<ul style="list-style-type: none"> <li>● Web communities &amp; open access resources</li> </ul>

The following is a list of publications, working papers and discussion documents produced as part of the process and finalisation of the policy scan research. It does not include project process or team meeting reports.

**Deliberation, Design, Development, Delivery: identifying avenues for policy dialogue between government and social economy organizations: initial findings from Atlantic Canada** – focuses on categorization and typologies of government-social economy organization arrangements (co-production and co-construction)

**Discovering the ‘public’ in public policy: identifying policies and frameworks that support development and engagement of social economy organizations in Atlantic Canada** – distillation of some of the initial findings from the scan that look towards positive engagement and participation mechanisms. This may be developed through further research and Phase 2 of the policy research.

**In Search of...** series of short discussion papers on the boundaries, scope and definitions relating to: policy, social capital and the social economy

**Mutual (Mis)Understandings: exploring the boundaries of social economy activity in Atlantic Canada** – expands on the boundaries and definitions paper and considers the diversity of place-based and community/member-led initiatives.

**Policy Inventory** – searchable spreadsheet and partially annotated listing of policies, statutes, programs from government and associated web-sites

**Public Policy and the Social Economy in Atlantic Canada: an inventory of jurisdictional policies, programs and activities that support social economy organizations at municipal, provincial and federal levels** – report and analysis based on the format and style of 2003 inventory of jurisdictional policies relating to community economic development (Infanti, 2003) but taking account of the broader scope of social economy.

**Referencing aspects of the social economy: a bibliography of practitioner and academic literature, web-resources and websites** - annotated bibliography

