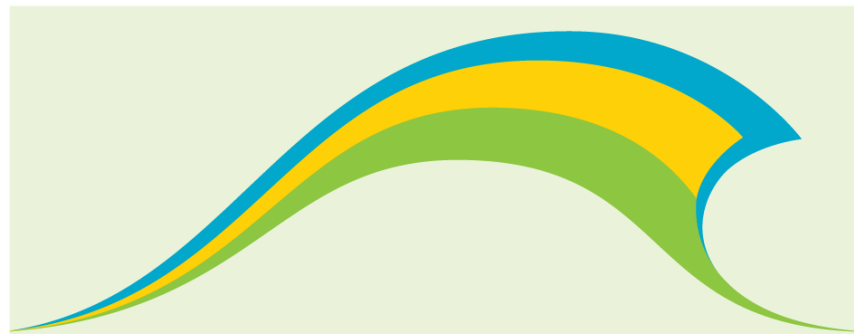


The Co-operative Sustainability and Planning Scorecard: a Tool for Retail Food Co-operatives

Réseau de recherche pour mesurer la
DIFFÉRENCE COOPÉRATIVE



Measuring the Co-operative Difference
RESEARCH NETWORK

Researchers: L. Brown (MSVU), E. Hicks (MSVU), A. Leclerc (U de M)
Community Partners: M. Bourque, R. Cormier, L. Leblanc, (Co-op Atlantic)

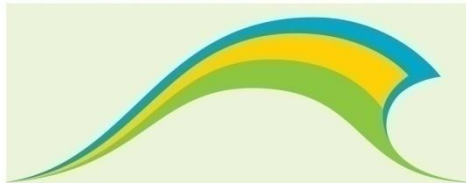
Co-operating for Change Conference

June 26, 2012, Montréal, Québec

Main Partners



Réseau de recherche pour mesurer la
DIFFÉRENCE COOPÉRATIVE



Measuring the Co-operative Difference
RESEARCH NETWORK

CANADIAN
CO-OPERATIVE
ASSOCIATION



ASSOCIATION
DES COOPÉRATIVES
DU CANADA



One University. One World. Yours.



Social Sciences and Humanities
Research Council of Canada

Conseil de recherches en
sciences humaines du Canada

Canada 

<http://www.cooperativedifference.coop>

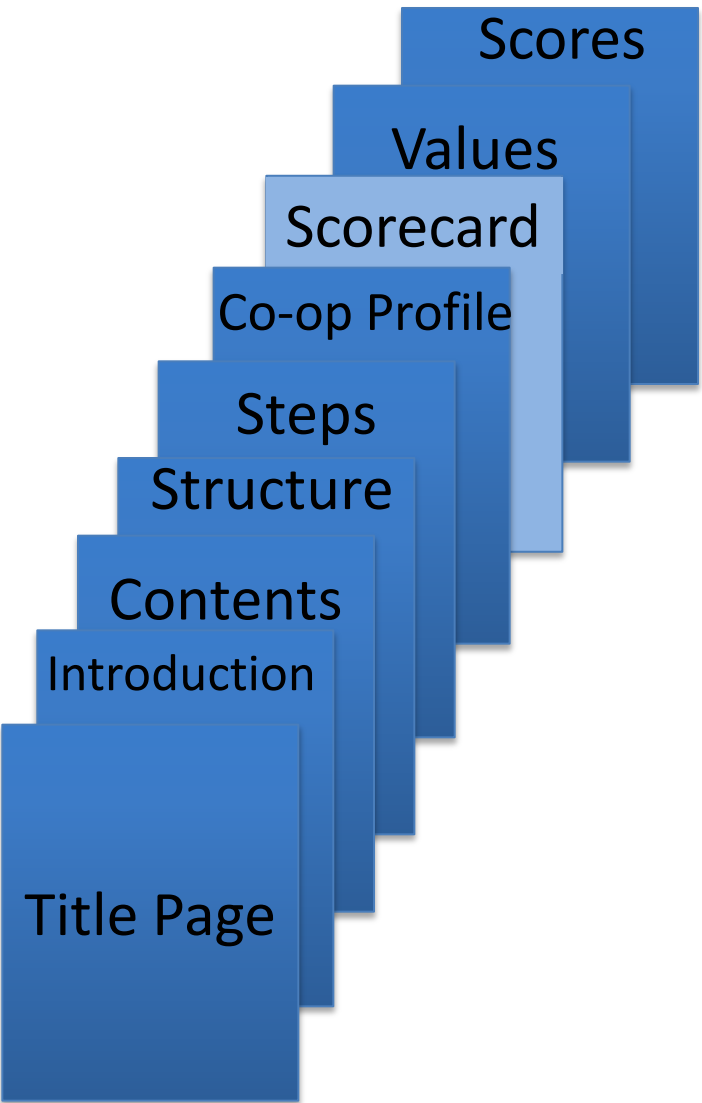
Today's Presentation

- ❑ The purpose of this tool
- ❑ The tool content
- ❑ Rolling out the tool – our experiences to date
- ❑ What's next

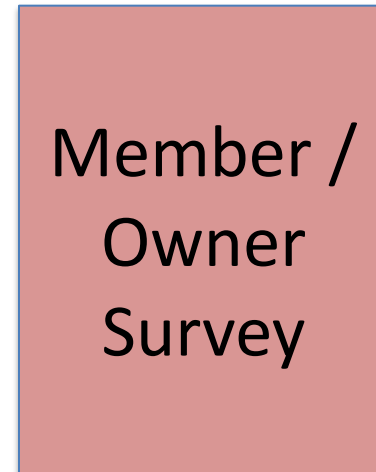
The Consumer Co-operative Sustainability and Planning Scorecard is Designed to...

- Engage member-owners, employees and other stakeholders in assessing and improving their co-op
- Identify and assess the co-op's performance on the co-op difference
- Support strategic planning, ongoing operations and governance
- Recognize and report on the co-op's impact on its community and the environment
- Demonstrate transparency and accountability
- Foster greater resilience, innovation and sustainability

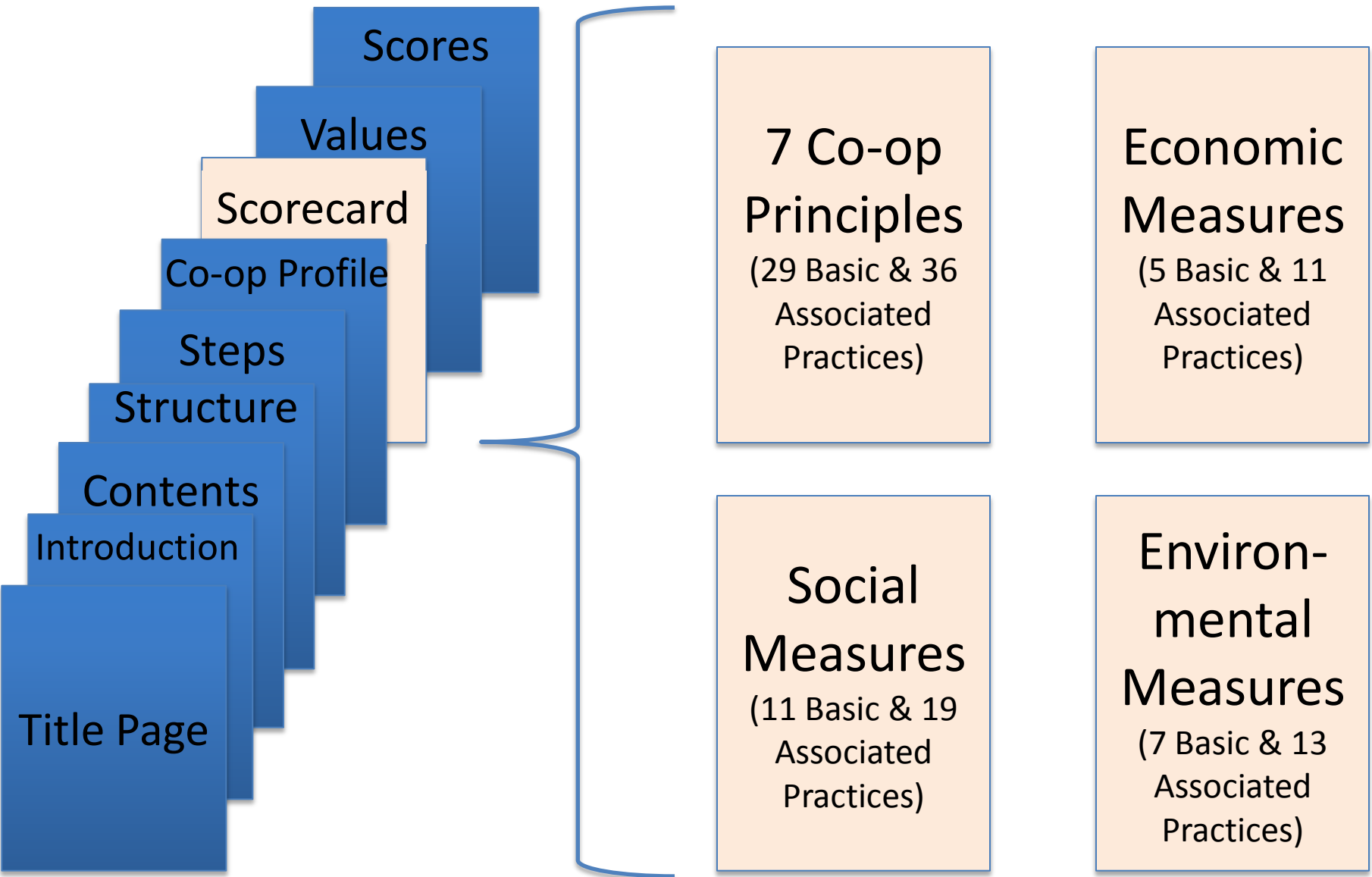
Okay, so what does this tool look like?



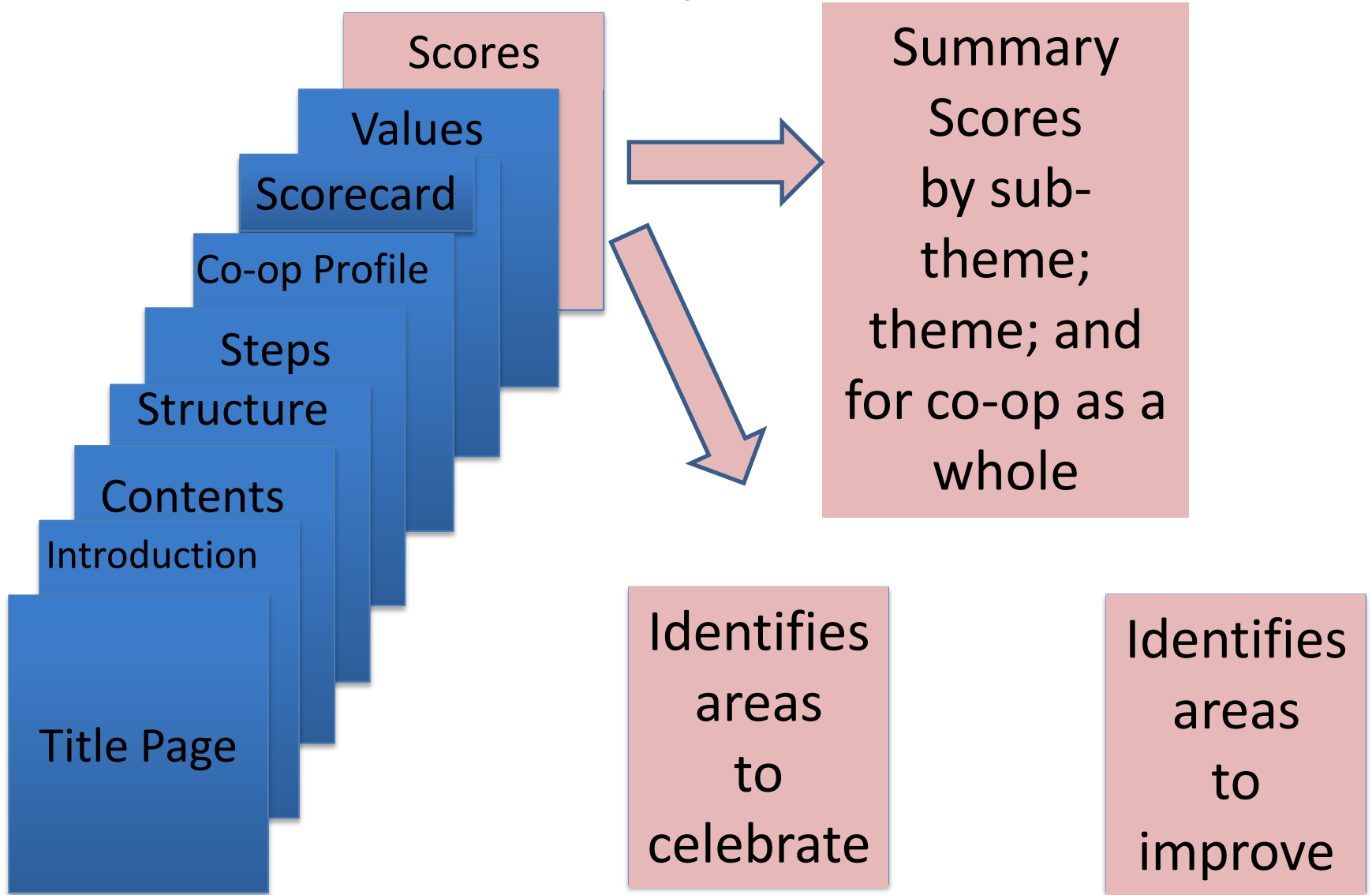
+



The Sustainability and Planning Scorecard



Summary Scores



A Flexible Tool

Designed to Grow with the Co-op

Choose one specific theme

Work with
basic
practices
only across
all 4 themes

A
FLEXIBLE
TOOL

Work with
basic &
associated
practices

Other permutations and combinations to
suit each co-op's individual needs

Scorecard Rollout

RAC and
PPCs
developed
the scorecard
2009- 2012

Presented
at Cluster
meeting
Feb. 2012

Scorecard
Workshop
May 24,
2012



Co-op Atlantic's Legacy Project

Developed
video for
Member
Relations
meetings

Presented
at Retail
Managers
Conference
Feb. 2012

Presented
at Area
Meetings
April 11 –
May 2, 2012

Benefits of Using the Scorecard as Identified at Feb. and May Events

- Helps the co-op to compete with big chains
- Helps the board of a new co-op become familiar with the co-op model
- Helps the co-op self-evaluate and take action
- Identifies areas where attention needed to be given (resulted in increased membership)
- Identifies areas to improve & areas done well.
- Creates awareness of how a co-op differs
- Engages the board & enhances ability to work as a team
- A practical tool showing meaningful results

Addressing Challenges Identified at Feb. and May Events

- **Needs to be user-friendly**
 - Changed format of the tool & added automatic functions
 - Split practices into Basic and Associated
 - Created a one page document about the Scorecard
- **Time required to complete the Scorecard**
 - Focus on the scorecard's flexibility and ability to grow with the co-op
- **Need to have manager buy-in**
 - Presentation to managers
 - Assurances that scores will not impact on manager performance evaluations

Addressing Challenges Identified at Feb. and May Events Continued

- **Encouraging co-ops to participate**
 - Ability to compare a co-op's performance with that of all participants as a group
 - Providing 2 surveys along with an analytical report of the results
 - Focus on areas of interest to the co-op or areas identified as a challenge for the particular co-op
 - Recognition awards
 - Availability of resources and support

Addressing Challenges Identified at Feb. and May Events Continued

- **Need for support and resources**
 - Access to on-line resources & guide
 - Support person available to work with individual co-ops.
 - Create a community of practice to support co-ops in using the tool and provide on-going follow-up
 - Employee and Member/customer surveys will be provided & researchers will a report to the co-op on the survey results

What Workshop Participants Had to Say

“the tool is definitely an excellent evaluation tool, it is necessary to embed this in our co-operative”

“Really good program – anxious to start using”

“Can’t wait to see this in practice”

“Very good, logical program and easy to use. Necessary tool for the survival for many co-ops”

“Every co-op needs to take part in this project without exception”

What's Next?

- Developing a user-friendly web version
- Recruit co-ops
- Finalize surveys
- Finalize instruction guide & resource site
- Provide training & assistance for co-ops
- Administer surveys and prepare reports for co-ops
- Investigate use of tool by co-ops and its impact, if any, on each participating co-op

For More Information...

Researchers

Leslie Brown - MSVU

leslie.brown@msvu.ca

Elizabeth Hicks – MSVU

elizabeth.hicks@msvu.ca

André Leclerc – U de M

andre.leclerc@UMCE.CA

Community Partners – Co-op Atlantic

Monique Bourque

Monique.Bourque@coopatlantique.ca

Roméo Cormier

Romeo.Cormier@coopatlantic.ca

Léo LeBlanc

leo.leblanc@coopatlantic.ca

What Workshop Participants Had to Say

- *“the tool is definitely an excellent evaluation tool, it is necessary to embed this in our co-operative”*
- *“Can’t wait to see this in practice”*
- *“Very good, logical program and easy to use. Necessary tool for the survival for many co-ops”*
- *“Every co-op needs to take part in this project without exception”*
- *“Really good program – anxious to start using”*

Comments from May 2012 Workshop

- **Most interesting and useful aspects of the workshop**
 - *“Associated practices. Summary tab is awesome!”*
 - *“Regular use of the co-op profile data could be very beneficial”*
 - *“Should be helpful to identify areas to improve and promote the things you are performing well.”*
 - *“Co-operation among different co-ops. I liked the fact that Coop Atlantic supports this project at 100%”*
 - *“The practical application of the tool”*
 - *“That this data can be collected and show meaningful results”*

Comments from May 2012 Workshop

- **Additional support our co-op will require, or like to have, in order to use the scorecard?**
 - A resource person / team while they work through the tool
 - Help with the surveys
 - All benchmarks
 - Assistance to do planning report or action list upon completion of the Scorecard
 - On-going follow-up
 - Some guidance with details

Comments

from February 2012 Team Meeting

- We are a new co-op with big chain competition. The tool will help the board and others who are not familiar with the co-op model.
- Started realizing while working with the tool that there were areas of the tool that related directly to our co-op at that point (e.g. lack of connectedness with the community) so we began new community initiatives resulting in increased membership and community awareness of the co-op model.
- Governance was enhanced by working with the tool . Board members wanted to be heard.

Comments

from February 2012 Team Meeting

- “I believe the scorecard project is realistic & feasible, and will have positive impacts on our co-ops when it’s put to use!”
- “As a topic, sustainability planning is important. I hope that this scorecard will actually make the co-ops more sustainable and more integrated in their community”
- “I can’t wait to see how it’s going to move forward and become a reality! Just working through the sample part that we were charged with helping with, our co-op already got a better idea of where we were at in our organizational development, and what our strengths are!”

Comments

from February 2012 Team Meeting

- “....It is a powerful tool, and it has uses beyond consumer co-ops, and beyond Co-op Atlantic, so we need to move this forward.”
- “When a board accepts to take this on, and then spend over 8 hours together in order to complete the work, I can attest that there is a rather special “meeting of the minds” that happens, that will change that board in some way, and have lasting positive effects on their ability to work together as a team...”
- “I work with the managers. I see a lot of challenges in my job, and I think that this is going to be helpful in finding solutions”