Chapter 8

The Sustainability and Planning Scorecard: A Tool Designed for and with Local Retail Food Co-operatives

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Introduction

Wholesale and retail co-operatives are in many respects the most important non-financial Canadian co-operative sector. In 2009 they had the largest number of members (5.8 million, 80 percent of total), the largest value of assets ($7.7 billion, 36.6 percent), and highest sales ($16.3 billion, 48 percent) (Industry Canada 2013). Within this group, food stores count for 71 percent of the incorporated co-operatives in Canada (317 food stores out of 445 wholesale and retail co-operatives), and 54 percent of incorporated co-ops in Atlantic Canada. However, while many individual co-operatives are doing well, the retail food co-operative system in the Atlantic region is not thriving. The Sustainability and Planning Scorecard (the Scorecard), developed

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as part of a partnered applied research project (the Scorecard project) with Co-op Atlantic, makes a vital contribution to the repertoire of actions for local co-operatives as they individually and collectively identify and address a complex variety of opportunities and challenges.[6] The Scorecard also shows promise as an easily adaptable tool for retail co-operatives seeking to foreground their commitment to the seven co-operative principles and their identity as principled socially and environmentally responsible alternative businesses.

The Changing Environment for Food Retailing

Trends in the retail food industry and in consumer expectations place external pressures on retailers in their efforts to grow and develop — or even to simply sustain their current market share. These trends affect every aspect of the retail market, the most significant of which are: increased competition, changing consumer tastes, and heightened expectations related to developments in technology. While co-operatives face many of the same challenges and opportunities as the rest of the sector, they must address those using strategies that suit their local community contexts, and that build on the strengths of the co-operative model as an alternative form of business.

Competition within the food retail sector is intense (Condon, 2013) and, in Atlantic Canada, is intensifying (Auld 2013; Atchison 2014; Taylor 2014). Canada-wide, in 2012, approximately 60 percent of the retail food market share was controlled by three companies, all of which are among the top five retail companies in Canada — Weston (of which Loblaw is a part), Empire, and Metro (Statistics Canada 2012; Office of Consumer Affairs 2013, 13). US food producers and retailers are specifically targeting the Canadian market, adding to competitive pressures (USDA Foreign Agricultural Service 2014), and are joined by an increasing number of small and often specialized independents unconnected to the large corporate chains (Condon 2013; Holloway 2014).

6. Co-op Atlantic is headquartered in Moncton, New Brunswick. It is a second-tier co-operative and is owned by more than sixty co-operatively owned businesses across the Atlantic Provinces (http://www.coopatlantic.ca). Over the past ten years, the number of retail food co-ops among Co-op Atlantic's members has declined, a matter of significant concern in the Atlantic region.

Grocery retailers use many strategies to increase competitiveness. This can include cost-cutting measures such as shifting to part-time staff, and introducing self-checkouts (Sherman 2014); and a focus on increasing profits through strategies such as expanding product range to include non-food products (such as gas, clothing, pharmaceuticals, finance). Product incursion is also practiced by general merchandise retailers, who have now expanded into food sales (Avery 2013). For example, by 2013, over half the Wal-Mart stores in Canada were Supercentres, carrying the full range of food items stocked by traditional supermarkets (Condon 2013).

Another major strategy for food retailers is to identify and respond to changing consumer tastes and priorities, even shaping them where possible. Such trends include increasing demand for: foods and products believed to produce health benefits (Agriculture and Agri-food Canada 2014); fresh and fresh-prepared foods (Shaw 2014; Watrous 2014); food labelling and traceability; sustainable and ethical farming and production methods (Agriculture and Agri-food Canada 2005; International Markets Bureau 2012); sourcing food through local economies and encouraging local agriculture and value-added local food processing (Province of NS 2013; Finnamore 2008). Small independent retailers — e.g., natural food stores — often focus on niche markets such as natural food stores, while large corporate stores may address the full range of these potential markets — e.g., Loblaw's President's Choice Organics.

These factors are playing out in a context of dramatic technological changes which both respond to and influence consumer tastes and consumer expectations. Since 2010, for example, Wal-Mart, Loblaw, Sobeys, and Metro have expanded their digital shopping systems, ranging from on-line grocery shopping with pick-up or delivery options, to interactive, in-store shopper support (Fraser 2010; Sturgeon 2014).

This overview makes clear that the changing environment for food retailing presents both challenges and opportunities for growth. It has become apparent that, if co-operatives are to survive and thrive in this highly competitive sector, they need to understand the national and regional patterns that provide the context for local experiences. Co-operatives must carefully identify and choose among strategies to ensure long-term viability, and to attract members and customers to their

stores. What are the particular strengths of the co-operative model, and how can co-operatives best mobilize these strengths? For example, co-operatives may see opportunities in advice to retail stores that stress the importance of retail store offerings tailored to local consumer taste (Agriculture and Agri-food Canada 2014; Diekmeyer 2006). Co-operatives have the potential to be nimble in responding to local trends and needs, and have the added advantage of being able to ground such responsiveness in the International Co-operative Alliance's (ICA) seven principles, which embody the fundamental qualities of a member-owned, democratic, and co-operative form of business.[7] A number of the other consumer trends (e.g., preference for healthy foods and local foods) are both advantageous for co-operatives and consistent with the core principles of the co-operative identity — they are opportunities to be seized.

To capitalize on these opportunities, co-operatives need a deep understanding of, and relationship with, their members, employees, customers, and communities. Only then can they develop appropriate strategies for meeting local needs and enhancing the appeal of the co-operative model (not to mention market share). Co-operatives have yet another strength that is often underplayed: individual co-operatives are linked through a co-operative wholesaler, through co-operative councils, and through the movement that sustains the ICA (see the 6th Principle). The co-operative movement's vision of a better world can nourish local co-operatives and their members, joining their efforts to those of other social justice movements.[8] Building and drawing upon this energy and

7. The International Co-operative Alliance's (ICA) seven principles are (a) voluntary and open membership; (b) democratic member control; (c) member economic participation; (d) autonomy and independence; (e) education, training, and information; (f) co-operation among co-operatives; (g) concern for the community. Further details on the ICA; and co-op identity, values and principles can be found at http://ica.coop/en/whats-co-op/co-operative-identity-values-principles.
8. "The International Year of Cooperatives is intended to raise public awareness of the invaluable contributions of cooperative enterprises to poverty reduction, employment generation and social integration. The Year will also highlight the strengths of the cooperative business model as an alternative means of doing business and furthering socioeconomic development" (official website of the International Year of Cooperatives (IYC) http://social.un.org/coopsyear/.)

support is vital to the long-term success of co-operatives (Diamantopoulos 2012b; Brown and Winstanley 2008, 69).

The Scorecard project mentioned above assists retail food co-operatives as they take up social accounting and reporting in order to obtain information for continuous improvement and strategic planning. The co-operatives that use this tool are guided through a process of self-reflection and self-assessment, measuring their achievements and shortfalls in relation to co-operative principles and the co-operative's own triple-bottom-line priorities. Upon completion of the Scorecard they can use the information to inform strategic planning and, if they choose, use it as the basis of a social report to key stakeholders.

The next section of this chapter presents a review of social reporting in Canadian co-operatives and the particular ways reporting fits with the objectives of co-operatives. Section three reviews the process of developing the Scorecard, while section four describes the results of its initial implementation. To bring this to life, we are fortunate to be able to include a reflection on the process as experienced by one of the co-operatives that has been involved as a partner in this project since its inception. The summary and conclusion wraps up the chapter, situating our work within the ongoing dialogue around self-assessment and reporting by retail food co-operatives.

Sustainability Reporting by Canadian Co-operatives

Debates about the social responsibilities of businesses date back as far as business itself (Asongu 2007), and since the end of the twentieth century the concept of sustainability reporting (often called corporate social responsibility reporting)[9] has been gaining in popularity. Neo-liberal

9. Corporate Responsibility reports go by many different names, including: accountability reports; sustainability reports; corporate social responsibility (CSR) reports; sustainability development reports; corporate citizenship reports; environmental and social reports; People, Planet, Profit reports; and corporate responsibility and sustainability reports; with sustainability reports being the term used most often globally among the largest companies (KPMG 2013). The term "corporate report" is not commonly used by co-operatives, and for the sake of consistency we will use the term sustainability report throughout the remainder of this chapter.

globalization of the economy, technological advances, and the liberalization of trade (Pasquero 2005) are among the changes that have given rise to demands for greater disclosure from stakeholders and for measures to address the ethical concerns of consumers, investors, and prospective employees in their purchasing, investing, and employment choices. While still largely a voluntary commitment, the introduction of supplier codes of conduct by businesses (IISD 2011) and, since 2011, the increase in mandatory sustainability reporting by governments and stock exchanges (KPMG 2013) are among the many changes that have led to the increasingly widespread practice of sustainability reporting.

According to the 2013 KPGM study of the largest companies in 41 countries, 71 percent of the companies engaged in sustainability reporting compared with 64 percent in 2011. Among the largest 250 companies globally, the level of engagement was even higher, at 93 percent. Eighty-three percent of the 100 largest Canadian companies produce reports (KPMG 2013). At least for large companies, reporting has indeed become the norm:

> Companies should no longer ask whether or not they should publish a CR report. We believe that debate is over. The high rates of CR reporting in all regions suggest it is now standard business practice worldwide. (KPMG 2013, 11)

While in large part a response to external pressures, sustainability reporting is also thought to offer benefits for the organizations that report (Carroll and Shabana 2010). Sustainability reports are a communication tool, both internal (employees) and external (owners, customers, and other stakeholders), that can enhance the organization's reputation, thereby improving employee morale, recruitment, and retention, as well as trust and relationships with external stakeholders (Robins 2011; Chang et al. 2013). Through the process of preparing sustainability reports, the organization learns from its stakeholders and becomes more aware of organizational risks and opportunities (e.g., population growth and shift to urban areas, climate change, etc.). The information derived is useful for strategic planning and prioritizing issues important to the organization's sustainability, thus improving performance and innovation (KPMG 2013; IISD 2011).

Sustainability reporting for co-operatives has become both a matter

of significant discussion and debate, and a practice increasingly engaged in by co-operatives. This is in part a response to social currents supporting this form of accountability and self-promotion, and partly because co-operative activists believe strongly that co-operatives have a very different take on sustainability than do corporations. Sustainability reporting for corporations is embedded in corporate priorities that necessarily emphasize growth, profit maximization, and shareholder value (ICA 2013, 20). Co-operatives, on the other hand, can offer a genuine alternative to dominant organizational forms and practice (Hernandez 2006; Restakis 2010; Conaty and Lewis 2012; Birchall and Ketilson 2009).

The ICA encourages sustainability reporting as one way to make visible the alternatives offered by co-operatives. For example, noting the increasing demand for accountability and openness, the *Blueprint for a Co-operative Decade* (ICA 2013, 10) argues that "participation is once again becoming one of the co-operative sector's most valuable assets":

> Uniquely amongst models of enterprise, co-operatives bring economic resources under democratic control. The co-operative model is a commercially efficient and effective way of doing business that takes account of a wider range of human needs, of time horizons and of values in decision making. (ICA 2013, 2)

One of the *Blueprint*'s five strategic goals[10] includes positioning co-operatives as builders of economic, social, and environmental sustainability; another emphasizes participation within membership and governance, while a third calls for securing the co-operative identity.[11] Sustainability reporting can contribute to each of these goals.

While in the past co-operatives have been described as having dual (even competing) priorities as businesses and as democratic associations, the rise of social responsibility reporting offers co-operatives one way to answer Birchall's (2000, 93) call for action:

10. (a) Elevate participation within membership and governance to a new level; (b) Position co-operatives as builders of sustainability; (c) Build the co-operative message and secure the co-operative identity; (d) Ensure supportive legal frameworks for co-operative growth; (e) secure reliable co-operative capital while guaranteeing member control (ICA 2013, 6). Sustainability is covered on pages 14–18.
11. In discussing identity, the document explicitly rejects the more common term "brand" (ICA 2013, 21).

> As globalisation and market competition intensifies, we cannot continue with the old idea that a co-operative has a dual character, as an association of members and a business, and that what the managers and board of directors have to do is somehow to live with the tension between them. If co-ops and mutuals cannot fuse together the association and the business into something new that builds on the strength of membership to gain market advantages, then they will not be able to survive.

Claims to a "co-operative difference" by co-operatives typically rest on the fundamentals of the Co-operative Identity Statement (ICA 1995). The seven co-operative principles offer evidence that democracy, accountability, and community responsibility are embedded in the very nature of co-operatives. For example, see the language used in social reports by Co-operatives Europe (2012) and Desjardins (2011), or the assertion by Martínez et al. (2006, 112) that "la responsabilité sociale est intégrée aux valeurs et aux principes spécifiques qui définissent la configuration organisationnelle des coopératives" (social responsibility is integrated into the values and principles that define the specific organizational configuration of co-operatives).

To further investigate the idea of sustainability from a co-operative perspective, in particular in relation to the seven co-operative principles, the ICA commissioned a study: Co-operatives and Sustainability (Dale 2013). The report builds inductively to a definition of a sustainable co-operative as one that implements all seven co-operative principles, maintains or restores the ecosystem, and is a viable business (Dale 2013, 23). The overall conclusion was that:

> The UN is correct to place its hope in the co-operative model and as an engine of sustainability.… The linkages to social dimensions of sustainability are stronger than the linkages to environmental and economic dimensions, but all three are present. The results of the crowd-sourcing demonstrate that co-operatives embed sustainability into their operating model and values, but further study is required to understand definitively the degree to which co-operatives are "walking the talk." (Dale 2013, 1)

We contend that this conclusion, coupled with the report's definition of co-operative sustainability, draws attention to two related chal-

lenges facing co-operatives: how best to conceptualize and measure co-operative performance (using criteria appropriate for co-operatives), and how to sustain the fundamental qualities of the co-operative difference in the long term.

A number of Canadian co-operatives have been early adopters of publicly available sustainability reporting, with Mountain Equipment Co-op (2005), The Co-operators (2005), and Vancity Savings Credit Union (1998) among them (Pratt 2007; Khoury, Rostami, and Turnbull 1999).[12] As early as 1985, co-operatives had access to their own social audit manual (Social Audit Taskforce 1985), and the Canadian Co-operative Association continues to promote social auditing through its 2004 publication, "Ensuring Good Value in Co-ops and Credit Unions." While they draw on tools developed primarily for corporations (with the Global Reporting Initiative (GRI) being the most widely-used at present),[13] a review of the reports indicates that they often include measures specific to co-operatives (e.g., measures of democracy and participation).

Since 2008, Canadian food retailers, whether co-operatives or not, have begun to produce sustainability reports, addressing the consumer desire for responsiveness and for access to information about retail food products and the companies that provide them. Corporations have led the way. Loblaw and Wal-Mart Canada, for example, each developed

12. The authors are aware of a number of co-operatives and credit unions that produced reports for their own internal purposes but without making them widely available to the general public.
13. There are many voluntary reporting guidelines and assessment tools available, and the proliferation of such tools continues. For example, Future-Fit Business Benchmark from The Natural Step and S-CORE from 3-D Investment Foundation were both released in 2014 (Bertram 2014). The most widely-used tool is the Global Reporting Initiative (GRI), and it continues to increase its penetration. In May 2013 the fourth version of GRI guidelines, G4, were issued (GRI 2013) (KPMG 2013). Meanwhile, organizations such as AccountAbility and Social Accountability International develop principles-based standards and assurance practices for businesses practicing social reporting, and provide training for assurance providers. Co-operatives may borrow from these initiatives, but must ensure that the measures provided truly address co-operative performance criteria as embedded in the co-operative identity.

what they called "corporate social responsibility reports" in 2008 (Loblaw 2013; Wal-Mart 2010); Sobeys released a similar report in 2009, calling it a "sustainability report" (Sobeys 2009), while Metro's first report was in 2012 (Metro 2014). These reports offer integrated accounts of retail food industry practices, often with a particular focus on the environment, and they are gaining attention.

For a variety of reasons, Canadian retail food co-operatives have only infrequently produced publicly available sustainability reports.[14] In 2013, the largest non-financial co-operative in Canada, Federated Co-operatives, released its first Social Responsibility Report (Federated Co-operatives Limited 2013). Co-op Atlantic has yet to release a sustainability report. Instead, that co-op has chosen the innovative approach of partnering with academic researchers and local co-op stores in a project to bring social reporting to the local level through the Sustainability and Planning Scorecard project. One result has been the collaborative development of the Scorecard which is a focus of the next section of this chapter.

ICA's (2013) *Blueprint* raises the question of how best to sustain and privilege the fundamental qualities of the co-operative difference in the long-term. The answer to this must be multi-faceted, but in the Scorecard project we emphasize: a) the self-conscious assessment of a co-operative's performance in relation to its mission, goals, and other commitments; and b) the value of the Scorecard as a tool for internal planning and reporting, and for communication with a wider audience.

Sustainability and Planning Scorecard Development Process

The approach and the process through which the Scorecard was developed was presented in detail in Leclerc, Brown, and Hicks (2012). The starting point was a model proposed by Christianson (2009a, 2009b; also see chapter 7 in this volume). The Scorecard was created through a forty-eight-month participatory process that included consultations with various groups of stakeholders and external expertise: five pilot Consumers

14. We have no way of knowing how many retail food co-operatives produce internal reports for limited distribution internally, but it is important to acknowledge that this occurs.

Co-op boards, three Co-op Atlantic employees, and three researchers from two universities.

For the participating retail co-operatives, the main goals were to: assess their performance on financial, social and environmental aspects of their operations; provide co-operatives with the ability to assess their adherence to their values and principles; assess performance on the co-operative difference; contribute to strategic planning and continuous improvement; and to engage member-owners and other stakeholders in assessing and improving their co-operative. For the research team, the main goals were: build a profile of retail co-operatives in Atlantic Canada; demonstrate the social, economic, and environmental contributions of the co-operative difference; and strengthen the community of sustainability and planning practice in this region.

On a conceptual basis, the Scorecard finds its origins in what Strang (2010) called the "benchmarking management technique." For Strang, "[t]he logic of corporate benchmarking is that of learning from others: specifically, from the sources of best practice" (2010, 29). In the case of the Scorecard, it refers to the fact that participating co-operatives agree to self-assess their behaviour on a large number of issues, and then compare themselves with other co-operatives within the Co-op Atlantic network and/or a desired norm set by Co-op Atlantic. That is the source of the learning process for co-operatives, and the logic behind the strategic planning suggested by a completed Scorecard.

As it stands, the Scorecard is a web-based expert system supported by two surveys: the first designed to evaluate employee engagement and satisfaction, and the second built to study member and non-member shopper satisfaction with different aspects of their retail co-operative services.

The Scorecard is the core of the website. Accessible using a password, it is organized into seven sections:

1. a welcome page
2. a map of the website
3. three guideline documents explaining the Scorecard: introduction, the structure, and steps on how to complete it

4. the co-operative profile: a form asking for details on the co-operative such as the board profile, financial data, etc.
5. the performance measures organized into four themes: co-operative principles, economic measures, social measures, and environmental measures
6. a table on co-operative values providing a place for the co-operative to reflect on how these values have guided their decisions and actions
7. the Scorecard summary, which scores the co-operative on each of the four sections and identifies main areas for celebration or to focus on for improvement

Table 1. Scorecard terminology exemplified

		Practice Score	Priority	Indicators Measure	Benchmark
10	**Practice** The co-op board and manager develop a strategic plan.	[ ] Last step: Co-op scores itself based on measures	1–5 First step: Co-op sets its priority level		
A	Yes/No			[ ] (Co-op inserts its answer)	Yes (Set by various sources. See endnote 10)

If priority level is set at 5 (high), Associated Practices open up. Example:

10.1	**Associated Practice** The co-op board makes sure that the strategic plan is updated regularly, to reflect the current situation	[ ]	1–5		
A	Yes/No			[ ]	Yes
B	Date that the strategic plan was last updated			[ ]	(within one year of review)

The Scorecard is a tool for the board, which may decide to work alone or together with management, a volunteer committee, and other stakeholders.

The co-operative's self-evaluation for each of the four themes is organized through Practices (identifying the desired behaviours) and Indicators (measuring the implementation of these practices). There are two types of practices: "Basic Practices," which are central to the co-operative difference; and "Associated Practices," which dig deeper into the co-op's performance in areas considered a high priority. For each Basic Practice, the first step is for the co- operative to fix a priority level from one to five, i.e., very low to very high (Associated Practices are hidden, and will only appear if a very high priority is set). The co-operative works through the various "Indicators," self-assessing their performance. Indicators are made up of the "Benchmark"[15] that the co-operative should be aiming for, and the "Measure," which indicates the degree to which the Benchmark has been fulfilled. The final step is to determine the "score." A co-operative would give themselves a higher score — on a scale of 1 to 5 — if a majority (or all) of the performance Indicators linked to that Practice have been met.

Table 2 (overleaf) presents the structure of the Scorecard. More than half of the Basic Practices address various aspects of the seven Co-operative Principles (29 out of 52) as do close to half of the associated practices. Social Measures are the second largest theme. If a co-operative completes the indicators for every basic and associated practice in the Co-operative Principles theme, for example, they will have 65 different scores for that theme.

Two surveys complete the Scorecard. The employee survey, measuring employee engagement and satisfaction, contains 105 elements of information (questions, statements, and personal information). It includes 85 questions and statements on different aspects of employee work life, grouped into 19 themes (as shown in table 3, overleaf). The

15. Wherever possible, benchmarks have been set (e.g., where legally mandated, where mandated by Co-op Atlantic policy, or where there is guidance from other co-op literature). However, where none have been previously set, we plan to use collected Scorecard data to create regionally-based benchmarks in the future.

Table 2. Number of Practices and Indicators for the four themes

Themes	Basic Practices*		Associated Practices **	
	Practices	Indicators***	Practices	Indicators***
Co-operative Principles	29	104	36	76
Economic Measures	5	18	11	23
Social Measures	11	51	19	59
Environmental Measures	7	36	13	32
Total	52	209	79	190

* Identified by whole numbers in the Scorecard; ** Identified by decimal numbers; *** Identified by letters.

Table 3. Employee survey structure

Theme	Number of statements
1. Organizational commitment	
a. Affective commitment	3
b. Normative commitment	2
c. Continuity commitment	2
2. Overall satisfaction	1
3. Vision, governance, and co-op strategy	4
4. Relations with supervisor: people skills	5
5. Relations with supervisor: supervisory skills	2
6. Relations between and with colleagues	5
7. Organizational culture and communication	8
8. Training	5
9. Employee responsibilities and career plan	5
10. Work evaluation	9
11. Physical work environment	4
12. Salary and benefits	7
13. Autonomy on the job	2
14. Social status and personal life	2
15. Service quality	4
16. Performance assessment and management	5
17. Co-operative difference	2
18. Absenteeism	1
19. Specific questions for the Scorecard	10

last part of the survey contains two comment boxes ("What can this co-op do to increase employee satisfaction?" and "Other comments") and the respondent profile. Ten statements are directly linked to specific Indicators in the Social Measures section of the Scorecard.

The member/non-member shopper satisfaction survey contains 58 statements for members; or 37 for non-members. Both versions end with a respondent profile containing nine questions. This survey covers a range of aspects of the shopping experience: variety and quality of products and services, employee knowledge and courtesy, payment methods, hours of operation, accessibility, pricing, etc. The version for members also looks into the co-operative nature of the organization: the extent to which the co-operative educates members about environmental issues, the co-operative's reputation in the community, pride in being a member, etc.

The two surveys' results are also directly linked to some of the Indicators in the Scorecard, offering local co-operatives additional encouragement to adopt the Scorecard. Tables 4 and 5 present examples of questions that are directly associated with scorecard Indicators.

Table 4. Examples of links between Employee survey and Scorecard Indicators

Scorecard Indicator	**Examples of related Employee Survey Questions** (the employee rates the degree to which they agree/disagree with the statement)
24. The co-op keeps employees informed about their co-op (Yes/No) a) percent of employees who feel adequately informed about their co-op	• I understand the long-term strategy of the co-op. • In my present job, I am satisfied with the information I receive about this co-op's strategic orientations. • In my present job, I am satisfied with the information available regarding the impact of changes in the organization.
40. The co-op regularly assesses employee satisfaction (Yes/No) a) percent of employees satisfied with employment	• Overall, how satisfied are you with this co-op as an employee? • What can this co-op do to increase your satisfaction as an employee? • I would recommend employment in this co-op to a friend.
42. The co-op invites employees to play an active role in the organization (Yes/No) a) percent of employees who take an active role in the co-op	In my present job, I am satisfied with… • The opportunities I'm offered to take part in decisions having direct impact on my job. • Being able to help my colleagues at this co-op. • Being able to help this co-op's members and customers.

Table 5. Examples of links between Member/non-member shopper survey and Scorecard Indicator°

Scorecard Indicator	**Examples of related Membership Survey Questions** (the member rates the degree to which they agree/ disagree with the statement)
22A. Indicate the percent of members who feed adequately informed about their rights and opportunities as an owner-member	At my co-op, I am satisfied with… • The information the co-op provides on the rights and opportunities of owner/members. • The information the co-op provides to me about its products and services. • The amount of member education at the co-op.
30D. Indicate the percent of members satisfied with opportunities to give input/feedback	At my co-op, I am satisfied with… • How the co-op solicits information on member satisfaction regarding the election process and the representativeness of the board. • The opportunities the co-op presents for me to become involved. • The opportunities the co-op provides for me to give input and feedback.

The two surveys are administered and analyzed by the research team as part of the overall support offered to participating co-operatives. This is part of a broader support program including presentations of information about completing the Scorecard (in person, by email, Skype, or phone); a "Moodle" site (a free, open-source web application for producing modular Internet-based courses that support a modern social constructionist pedagogy)[16] for document transfer; a chat room for participants and the development team; and preparation of a global report based on all the information gathered with the Scorecard.

At the end of the process, a Scorecard Summary Table is produced automatically through the web-based expert system on the web-site. This Summary synthesizes the scores reflecting the extent to which practices are followed by theme; identifies areas to celebrate with members and other stakeholders (Annual Report, AGM, etc.); and, for strategic initiatives, identifies areas to improve. It provides information to:

- demonstrate the co-op's *contribution to its primary stakeholders* (members, employees, and community)

16. https://moodle.org/.

- provide individuals with *ongoing opportunities to be engaged* with their co-operative
- *help the board and the management team as they plan* for continuous improvement
- *engage employees* in assessing and improving their place of employment
- recognize and report on the co-operative's *impact on community and the environment*
- demonstrate *transparency and accountability*
- foster greater *resilience, innovation, and sustainability*.

To respect confidentiality, data access is protected by a password. Data are available only to the co-operative and the research team. It is up to each co-operative to decide how widely it will share the information from their Scorecard.

Initial Implementation of the Scorecard

Since the research team presented the Scorecard at the June 2013 Co-op Atlantic AGM, retail co-operatives have been invited to use it to evaluate themselves. Four of them have since undertaken the self-assessment process deciding, based on their own circumstances, whether to complete all or only some of the scorecard. The sections requiring information from the employee and member/non-member shopper surveys will be added as soon as they have been administered by the research team. Throughout the process the team has provided support in understanding the basics of the Scorecard and the different steps of self-assessment.

The data from the Scorecards will be used in several ways. First and foremost, the information will allow the individual co-operatives to see, when evaluated against their own priorities, which areas of performance they are weak on and in which areas they are doing well. Secondly, once enough co-operatives have completed the Scorecard it will be possible to provide summaries of the similarities and differences across co-operatives. A regional profile of the retail co-operatives will emerge from this work.

For the purposes of this chapter, we have to work with partial data

from only four co-operatives. Table 6 presents a compilation of the self-assessment results for all the practices (each indicator evaluated counts as one item) scored by any of the co-operatives. For each practice, the co-operative has first to indicate the level of priority for this practice on a scale of 1 – 5, with 5 being the highest priority. Secondly, based on their performance on the Indicators associated with each practices, the co-operative assigns itself a "Score" indicating the extent to which their co-operative fulfills the Practice (also on a scale of 1–5). In interpreting the table below it is important to remember that, as indicated in table 2, there are different numbers of practices and indicators for each section of the scorecard.

Table 6: How co-ops have prioritized and scored Practices in different sections of the Scorecard

	(low)		Score Options		(high)	# of Practices
Section of the Scorecard	**1**	**2**	**3**	**4**	**5**	**evaluated***
1 Co-op Principles						
Priority (percent)	4.9	7.7	13.4	14.1	59.9	142
Score (percent)	8.4	9.5	12.6	13.7	55.8	95
2 Economic Measures						
Priority (percent)	0	4.9	12.2	17.1	65.9	41
Score (percent)	11.8	5.9	11.8	14.7	55.9	34
3 Social Measures						
Priority (percent)	1.5	0	22.1	8.8	67.6	68
Score (percent)	15.4	11.5	11.5	15.4	46.2	26
4 Environmental						
Priority (percent)	6.7	20.0	31.1	13.3	28.9	45
Score (percent)	57.1	3.6	10.7	21.4	7.1	28
Global						
Priority (percent)	3.7	7.4	17.9	13.2	57.8	296
Score (percent)	17.5	8.2	12.0	15.3	47.0	183

* As indicated above, it is practices that are scored and prioritized, so one might expect the numbers to be the same. However, it is also possible to set priorities for practices and then decide not to score them.

If we first look at the priority (percent) for each measure, and at the final column of the table we observe that, at the global level, 57.8 percent of the 296 evaluated items received the highest priority rating of 5. This

result is not surprising if we consider that the Scorecard was built with a participatory approach. Since the practices included in the Scorecard were important to the participating co-ops when they helped design the Scorecard, they are likely to give them a high priority as they complete their self-assessments.

The results for the prioritization of practices also allow us to explore the relative importance of the four themes covered by the Scorecard. Thus far, of all the items evaluated, those related to the Social Measures and the Economic Measures received the highest priority rankings: 67.6 percent of the practices related to Social Measures and 65.9 percent of practices associated with Economic Measures. The corresponding figures for Co-op Principles and Environmental Measures are 59.9 percent and 28.9 percent, respectively.

As reported in the rows marked Score (percent), the assessments indicate that the four participating co-operatives have a generally positive perception of their work: 62.3 percent (15.3 + 47.0) of the scores are equal to or higher than 4 (with a top rating of 5). All of these Practices would therefore be noted in the "Main Areas to Celebrate" category of the Scorecard summary. As already mentioned, the indicators for many of the practices offer benchmarks, and we can analyse how well the co-operative is doing relative to those benchmarks. For example, of the indicators that were evaluated in the Economic Measures section of the Scorecard, 85.2 percent of those for which benchmarks were supplied were given scores at or better than the benchmarks.

A comparison of results by section shows that the scores for the Environmental Measures are lower than for others. This means that these indicators are more difficult to fulfill and/or were perhaps not as high a priority. If we concentrate on the last two options (4 and 5) of the "Score" columns for each section, we see that for Co-operative Principles, a total of 69.5 percent of the Practices were given scores of 4 or 5. For the Economic Measures and Social Measures sections, the total is 70.6 and 61.6 percent , respectively. In the case of Environmental Practices, the total is a low 28.5 percent .

This analysis of the results thus far clearly demonstrates how precise the Scorecard can be. Co-operatives that use the Scorecard as a self-assessment and planning tool will find that it clearly identifies main areas

to celebrate, and areas where work has to be done. It is a tool to communicate success and pinpoint areas for improvement.

Lessons from Morell Co-op: A Personal Perspective

Siri Jackson-Wood
Morell Consumers Co-operative Store*

Using the Tool

The Morell Consumer's co-operative first became involved with the Sustainability Scorecard in June 2009, following an introductory workshop held at the Co-op Atlantic annual general meeting and an invited presentation by one of the researchers at a board meeting. The development process took the better part of a year, through that process we learned not only about the assessment Tool, but a great deal about each other and how we fit within our Co-op and ultimately within our community.

The final Scorecard is broken down into four sections, each containing questions that, when answered honestly, will give a co-op a starting point to grow from. Within each section, the co-op is asked to determine whether the information being discussed is a high priority to them. Once the priority level is established, the Tool then digs into the meat of the area and helps to uncover, through professional and personal introspection, what individuals as members, management, staff and/or directors can do to set the co-op on the path of continuous improvement. Long before completing the Scorecard, though, we experienced benefits. To cite an example, at the time we started working on the Scorecard, Morell Co-op was experiencing communication issues between management and staff concerning

* Siri Jackson-Wood was a board member of Morell Co-op when it joined the project in the design stage for the tool; she continues in that position. She is currently on the board of Co-op Atlantic as well. A more complete reflection on Morell's experience, "Tools to Measure Your Co-op's Forward Motion," can be found in a webinar at http://www.cooperativedifference.coop/en/hub/Events-Opportunities

who was responsible for particular tasks. Working through the governance section of the Scorecard, a discussion arose around the routing of such communication. As a direct result, the manager developed a "Communication Tree" to be posted in the break room, giving all staff an understanding of who to approach when direction is needed, thus eliminating confusion and improving overall efficiency.

The Scorecard is not a tool to be used once and filed away. It is meant to be a continuous process, and the efforts put in will be reflected in the future results seen by the co-op. The initial use will take time. We found that it was best when broken into blocks of two to three hours at a time. Many of the questions led us to discussions, which inevitably taught us more about our co-op and its inner workings.

The first time the Scorecard is completed, the overall assessment designates the baseline. It also provides direction into which areas need more immediate attention. An example of this for us occurred while we were using the portion of the Scorecard concerned with the seven co-op principles. While answering the questions pertaining to strategic planning, it became obvious to us that we had never really had a formal strategic planning session. This led to a discussion about goals and objectives, mission and vision statements, and the importance of having an operational plan, updated regularly, for our manager to follow. It was decided that we would hire a facilitator immediately following our annual general meeting to help us develop a formal strategic plan. This end result was again directly related to our use of the Sustainability Scorecard.

We learned a great deal in the development phase of the project and, as we work to complete the second phase of using the Scorecard, the learning continues.

Overview: Lasting Impacts and Troubleshooting

We experienced a re-occurring misconception that the Scorecard was a test, which posed some problems for us as it led to feelings of being judged or tested. Initially, this led us to give what we thought were the desirable answers, instead of the truth, which would consequently

set us up with an inaccurate baseline. I found it helpful to continually remind participants that this was an assessment and that it was OUR assessment.

Other challenges were of a more basic nature, like finding people willing and able to dedicate their time. We found that when members, staff, management, and directors were reminded that it is "their" store and that they are the owners, the desire to see and be a part of improvements came through. Sharing a meal, in our case, was also helpful; it lessened the feeling of doing "work," improved comaraderie, and made our meetings more of a group effort to help our store and benefit the community.

Another issue for our group was finding reliable internet connections at our chosen venues. We bypassed this by assigning one person to take notes on a hard copy of the Scorecard. The answers could then be entered into a computer at a later date.

One of our finest achievements, in my opinion, was how we learned to work together as a board . Previous to using the Sustainability Scorecard, I would have described us as a quiet board , basically putting in our time as directors but not using that time to create change. Today, we face challenges together concerning our co-op, look forward to on-going developing of our strategic plan, and anticipate the up-coming board meetings where we can hear what each director has to offer and build on those offerings. Our current president did a fantastic job facilitating the Scorecard with our board and credits that to having been a participant in the initial Scorecard development team.

Through its work with the Scorecard, Morell Consumer's Co-operative has realized benefits specific to its membership as well as to the organization. Completion of the Scorecard is not limited to the employees and directors, and participants from the community as member/owners are encouraged to become involved. In our experience, this aspect brought our membership into the actual ownership realm of our store. Results have become a consistent agenda item for the annual general meeting, sparking discussions and new ideas about future improvements. Within the store, lines of communication between staff and management have opened up and are becoming more fre-

quent and fluid. Transparency is now noted and recognized as such. Directors have a better understanding of their role and with that came the awareness of a proper governance structure. Completing the Scorecard does take strong commitment, but so does any worthy undertaking capable of effecting change.

One additional and welcome impact has been that the Prince Edward Island Co-operative Council has offered to make itself available to provide further information or to answer questions concerning the Sustainability Scorecard. The Council brings all types of co-operatives together as a co-operative movement, and its mandate includes co-operative development, governance, and raising public awareness.

Summary and Conclusion

This chapter has presented a particular tool, the Sustainability and Planning Scorecard, and some preliminary results from four co-operatives which have used the tool. The Scorecard provides valuable organizational level data that, when aggregated, can also inform regional level analyses. Grocery businesses are doing CSR reports, making claims about social responsibility, co-operatives may be seen to be losing ground if they do not also produce reports. Besides, if they are true to their nature as co-operatives, they should be able to make a strong case for themselves. Consumer preferences are changing, and reporting is one way to respond to these changes.

We noted that use of such tools is affected by context, and described the changing environment for food retailers in the region. A number of food co-operatives have closed, while others are vulnerable. Even those doing well are not taking success for granted. While they may be aware of the value of rigorous self-assessments and reporting, it is difficult for the co-operatives to take on new projects, such as the Scorecard Project, which may seem time consuming and remote from daily pressures. Further, as with other small and medium-sized enterprises, Atlantic co-operatives face challenges such as lack of time, money, and limited human resources (Hohnen 2007).

These and other challenges mean that, despite their recognition that the tool was developed through a participatory approach, it has not been easy to entice large numbers of co-operatives to the implementation phase. Those co-operatives that have participated have given leadership and extraordinary commitment to the development and use of the Scorecard. Their work is crucial for demonstrating the value of the tool, generating findings that contribute to our knowledge of retail co-operatives in the region, and encouraging others to get involved.

Our partnership is based in the premise that to be sustainable, co-operatives must draw on the strengths of their identity as co-operatives in ways that build capacity for meeting the needs and priorities of member-owners, strengthen relationships with their shoppers, and deepen their relationships with the community at large. In the task of re-invigorating their businesses and their sense of mission, taking the idea of co-operative identity seriously is one place to start. A successful co-operative has a clear sense of what it is and what it can offer its members and their communities, and it expresses these in terms that resonate in the environment it inhabits — the relationships it cultivates. The preliminary research finding, that Scorecard users prioritize both social and economic themes, is encouraging.

If the co-operatives successfully make this Scorecard project a regional effort, they may find themselves closer to reinvigorating not only their individual organizations, but the co-operative movement itself. Themes of diversity, inclusion/exclusion, identity, and social and environmental justice, are basic to public debate and to the development and sustainability of organizations in today's world. Co-operatives can be leaders in these areas, as were the Rochdale pioneers with their refusal to let differences of religion, sex, or political affiliation hamstring the efforts to provide healthy food at affordable prices to its members.

Some co-operatives address challenges by becoming defensive, developing a strong preoccupation with business development at the expense of other priorities. Others choose to address challenges by focusing on the particular alternatives that the "co-operative way" offers, and by working with like-minded constituencies that support co-operative solutions to economic and social problems.[17] Possible natural constituencies in the Atlantic region include those concerned about local

and sustainable food systems, food security, the environment, and the civic agriculture movement.

The Scorecard, together with its supporting surveys, contributes to a process by which co-operatives draw upon co-operative principles and values as they determine their way forward. The Scorecard can help Atlantic retail food co-operatives as they strive to be very clear about their mission, their identity as co-operatives and their place in the social and economic fabric of the communities they serve. It is a tool that tailors self-assessment measures, benchmarks and performance criteria to the specific characteristics of co-operatives, and the priorities of the co-operative using the tool. The process of completing the scorecard and the data it provides can support the innovative leadership and governance practices that are necessary for individual and system-wide sustainability.

17. Diamantopoulos (2012a, 202) discusses this issue in more depth.

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