



# **Consumer Co-operative Sustainability and Planning Scorecard**

**Leslie Brown**  
**Elizabeth Hicks**

Mount Saint Vincent University

**André Leclerc**  
Université de Moncton

Co-op Atlantic AGM  
25 May 2013



# Plan – 30 minutes + questions

- Welcome by Co-op Atlantic and the Research Team
- Development Team
- Main Partners
- Main Goals
- Measuring the Co-operative Difference
- Scorecard
- Scorecard Overview
- Available Support
- Next Steps
- Questions / Discussion

# Development Team

## **Coop Atlantic**

- Léo LeBlanc
- Monique Bourque
- Roméo Cormier

## **Consumer Co-operatives**

- 5 Pilot Project Committees (PPC)
- 2 anglophone & 3 francophone

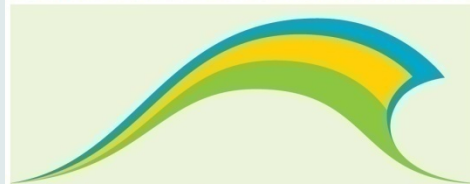
## **Researchers from 2 universities**

- Leslie Brown and Elizabeth Hicks, Mount Saint Vincent University
- André Leclerc, Université de Moncton

# Main Partners



Réseau de recherche pour mesurer la  
**DIFFÉRENCE COOPÉRATIVE**



Measuring the Co-operative Difference  
**RESEARCH NETWORK**



Social Sciences and Humanities  
Research Council of Canada

Conseil de recherches en  
sciences humaines du Canada

Canada 





# Main goals

- **Support the retail co-operatives in using the scorecard to:**
  - ✓ Assess their performance on financial, social and environmental aspects of their operations;
  - ✓ Provides 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 & continuous improvement;
  - ✓ Engage member-owners and other stakeholders in assessing and improving their co-operative;

# Main goals

- Build a profile of retail co-operatives in Atlantic Canada.
- Demonstrate the social, economic & environmental contributions of the co-operative difference.
- Strengthen the *community of sustainability and planning practice* in this region.



# Why is it important to measure the Co-operative Difference?

# Comments from Pilot Project Co-operatives

*«Pour mieux faire  
comprendre nos  
particularités et  
promouvoir le modèle  
coopératif.»*

*«Nous avons  
l'impression d'en  
sortir enrichis.»*

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

*“”It also was helpful to  
show us areas in which  
we need improvement  
but were areas clearly  
unknown to us.”*

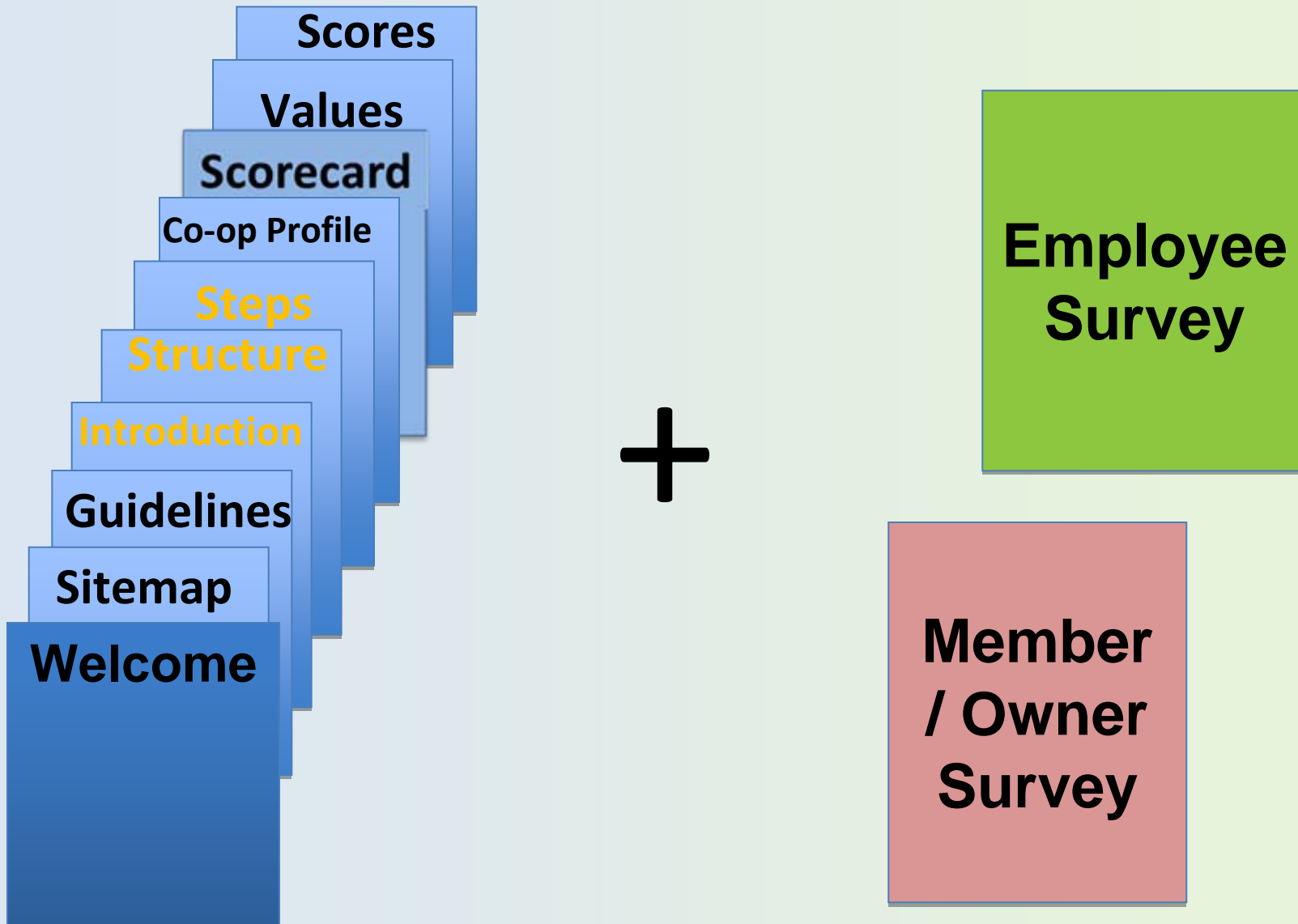
*«Une fois regroupés,  
les résultats nous  
fourniront un portrait  
global de la  
contribution des  
coopératives dans la  
région.*

**OK,  
so what does this tool look like  
anyway?**

# The Scorecard is a web expert system divided into 7 sections

1. Welcome
2. Sitemap
3. Guidelines
  - a) Introduction
  - b) Structure
  - c) Steps
4. Co-operative Profile
5. Scorecard
  - a) Seven Co-operative Principles
  - b) Economic Measures
  - c) Social Measures
  - d) Environment Measures
6. Co-operatives Values
7. Scorecard Summary

# A web expert system





Welcome x 2013 AGM - Dropbox x Shared with Andre Elizabeth x

www.umce.ca/coopat/index.php

Souhaitez-vous que Google Chrome enregistre votre mot de passe ? Enregistrer le mot de passe Jamais pour ce site

# Consumer Co-operative Sustainability and Planning Scorecard

## Measuring our Performance on the Co-operative Difference

[Home](#) [Sitemap](#) [Guidelines](#) [Profile](#) [Scorecard](#) [Co-operative Values](#) [Scorecard Summary](#) [Logout](#)

### Welcome

Welcome to the Consumer Co-operative Sustainability and Planning Scorecard!

This scorecard has been developed through participation and co-operation among Co-op Atlantic (Monique Bourque, Roméo Cormier, Léo LeBlanc), researchers from two participating universities (Leslie Brown, Elizabeth Hicks, André Leclerc), and interested local consumer co-operatives - pilot project co-ops: Musquodoboit Co-op (NS); Morell Co-op (PEI); la Coopérative Régionale de la Baie; la Coopérative de Saint-Louis; la Coopérative de Dieppe (NB). An early inspiration for this scorecard was the Co-operative Sustainability Scorecard developed by Russ Christianson, 2009. Together we have developed a user-friendly tool that will assist co-operatives in conducting social accounting and reporting in order to obtain information for continuous improvement and strategic planning. Co-operatives that use this tool will find that they are guided through a process of self-assessments that measure both their achievements and shortfalls in relation to co-operative principles and the co-op's own *triple bottom line* priorities.

This scorecard measures performance on 52 *Basic* practices that are central to the co-operative difference. Measurement of performance on a further 79 *Associated* practices is suggested, in order to dig deeper into the co-op's performance. Recognizing that a co-op cannot work on everything at once, the scorecard also helps in identifying a short list of action priorities for any given year.

For purposes of your first implementation of the scorecard we have included suggested benchmarks / targets for many of the indicators. However, the decision on targets for your co-op can ultimately be made by the Board and management in consultation with other stakeholders.

As results from the retail co-ops come in, you will be provided with averages of the aggregated Scorecard results gathered from all those co-operatives using the Scorecard in the Co-op Atlantic network. These, too, can be used to help set your targets.

Before you proceed, please see the information listed under the **Guidelines** menu. This section will provide you with more information

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Démarrer C. B. S. D. P. M. P. W A. W M. S. S. 1.. W. A. A. C. 15:08

# Approach & components

- Benchmarking management (Strang, 2010)
  - Compare your co-operative to others
- Expert system components
  - "**Priority**" & "**Score**" written as practices
    - Desirable behaviours
    - Basic Practices: Central to the co-operative difference
    - Associated Practices: To dig deeper into the co-op's performance
  - "**Benchmark**" & "**Measure**" written as indicators
    - To assess your co-op's situation
  - Help buttons

# Consumer Co-operative Sustainability and Planning Scorecard

Measuring our Performance on the Co-operative Difference

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## Section 1: Seven Co-operative Principles



The co-operative principles are guidelines by which co-operatives put their values into practice. ?

<http://www.ica.coop/coop/principles.html>

### Principle 1 - Open and Voluntary Membership ?

[Hide]

Co-operatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.

Group	Practices & Indicators		Practices		Indicators	
			Score	Priority	Measure	Benchmark
	1	The Co-op makes sure that the official membership list is updated at least once a year.	<input type="text"/> ?	<input type="text"/> ?		
	A	Yes / No			<input type="text"/> ?	<input type="text"/> Yes ?
	B	# of times that the Co-op updated the membership list over the year			<input type="text"/>	<input type="text"/> 2

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## Section 1: Seven Co-operative Principles



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### Principle 1 - Open and Voluntary Membership ?

[Hide]

Co-operatives are voluntary organizations, open to all persons who are willing to accept the responsibilities of membership, without gender, social, racial, political or religious discrimination.

At any time you may refer to the "Steps" document in the "Guidelines" menu for more details on how to complete the Scorecard.

Group	Practices & Indicators		Practices		Indicators	
			Score	Priority	Measure	Benchmark
	1	The Co-op makes sure that the official membership list is updated at least once a year.	<input type="text"/> ?	<input type="text"/> ?		
	A	Yes / No			<input type="text"/> ?	Yes <input type="text"/> ?
	B	# of times that the Co-op updated the membership list over the year			<input type="text"/>	2 <input type="text"/>

# Scorecard in numbers

	<b>Basic Practices*</b>		<b>Associated Practices**</b>	
	<b>Practices</b>	<b>Indicators***</b>	<b>Practices</b>	<b>Indicators***</b>
<b>7 Co-op Principles</b>	<b>29</b>	<b>104</b>	<b>36</b>	<b>76</b>
<b>Econ. Measures</b>	<b>5</b>	<b>18</b>	<b>11</b>	<b>23</b>
<b>Social Measures</b>	<b>11</b>	<b>51</b>	<b>19</b>	<b>59</b>
<b>Environ. Measures</b>	<b>7</b>	<b>36</b>	<b>13</b>	<b>32</b>
<b>Total</b>	<b>52</b>	<b>209</b>	<b>79</b>	<b>190</b>

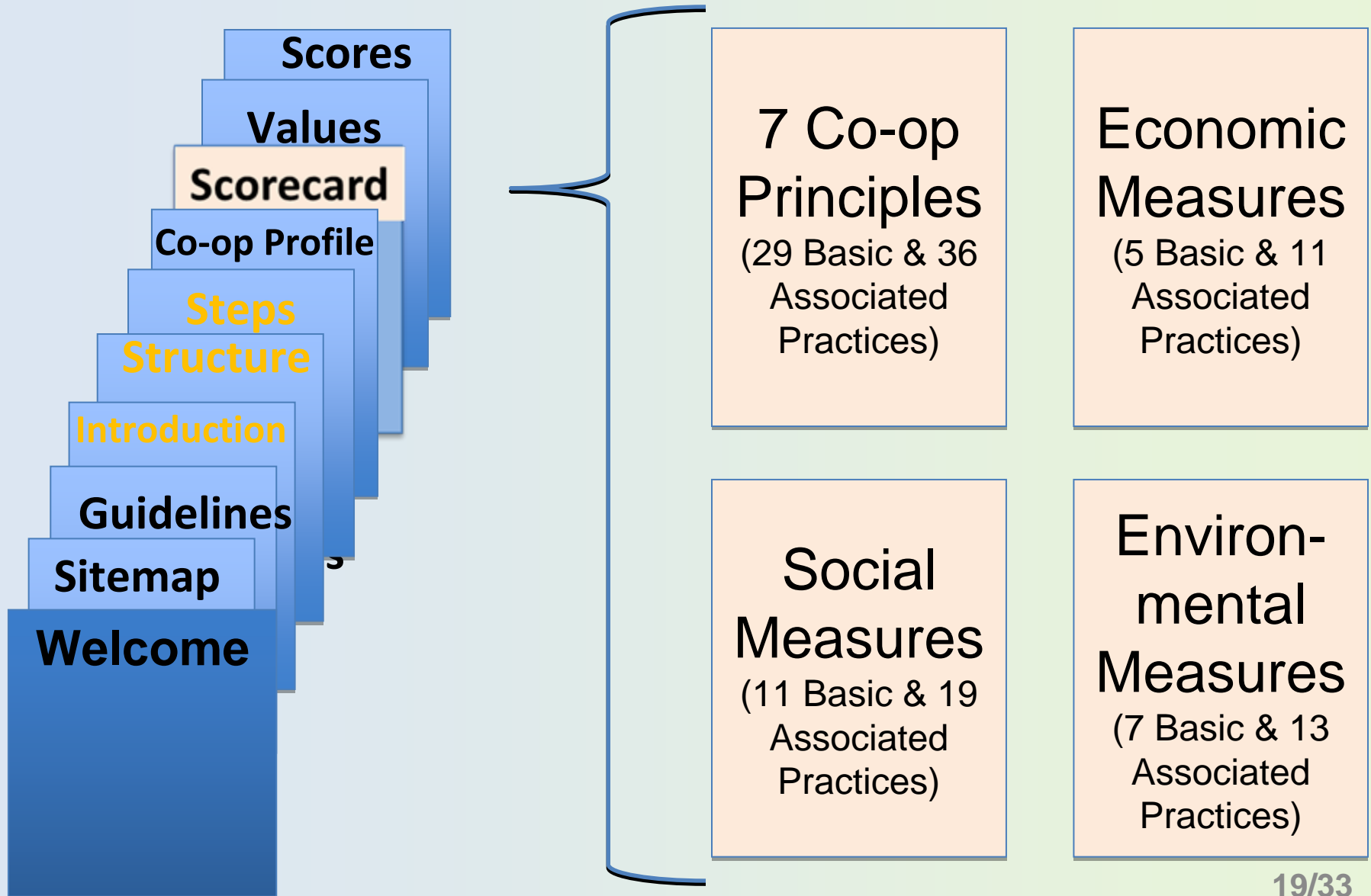
\* Identified in the Scorecard by integers

\*\* Identified by decimal numbers

\*\*\* Identified by letters



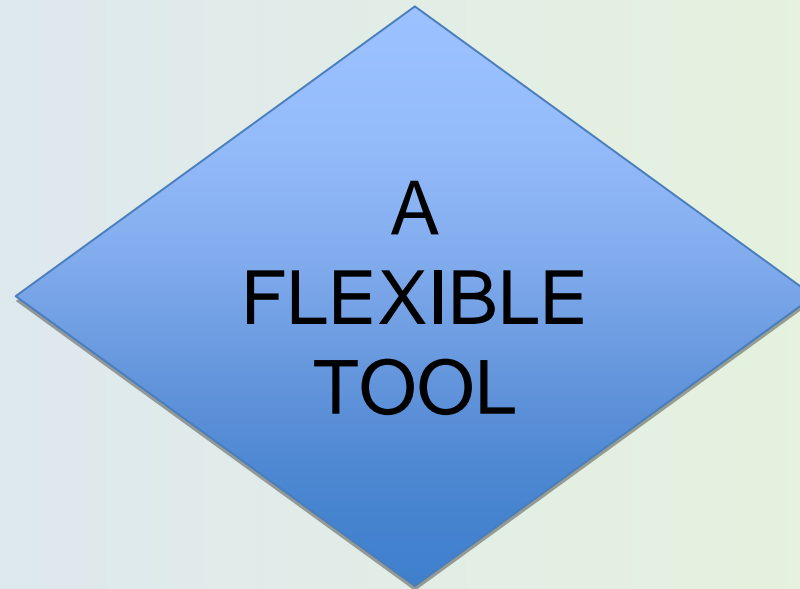
# Scorecard in numbers



# No need to take on everything at once the tool is **FLEXIBLE**

Choose one specific  
theme

Work with  
basic  
practices  
only,  
across all 4  
themes



Work with  
basic &  
associated  
practices

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

# Who does the work?

- Some combination of: the Board, management, volunteer committee
- Other stakeholders, including employees and members
- An employee survey and a member survey are part of the package!
  - Administered & analyzed by a team of university researchers
  - Results link to some of the indicators in the scorecard

# What do you have when you are finished?

- **The web expert system produces a Scorecard summary :**
  - ✓ Summarizes the scores reflecting the extent to which practices are followed, by theme
  - ✓ Identifies areas to celebrate with your members (Annual Report, AGM, etc.)
  - ✓ For your strategic initiatives, identifies areas to improve

# Consumer Co-operative Sustainability and Planning Scorecard

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## Scorecard Summary



(For details please refer to Steps 6 & 7 in the document on steps for completing the scorecard available in the "Guidelines" menu.)

As with each of the following automated summary sections, the summary of performance provides information on your co-op's score on basic practices (columns B, C and D) and the co-op's score on the combination of the basic practices plus any associated practices that the co-op measured (columns E, F and G). The columns D and G indicate the % score out of a possible 100% of points possible for basic practices (column D) and for basic + selected associated practices (column G).

### Section 1: Co-operative Principles

[Hide]

These scores are important indicators of how the co-op is performing on the practices associated with each of the co-op principles and, on the 7 principles taken together. In creating this score, each practice measured is given equal weight.

Of additional interest is the way these scores stack up in relation to the co-operative's particular priorities at the time of completing the scorecard. If Principle 5 is of high priority, then the co-op can justifiably celebrate any practice related to that principle that has a priority (4 or 5) AND has a high score (4 or 5). In the case where principle 5 is of very high priority (5) AND has a low score (1 or 2) the co-op needs to make changes to improve performance by a specified time in the future.

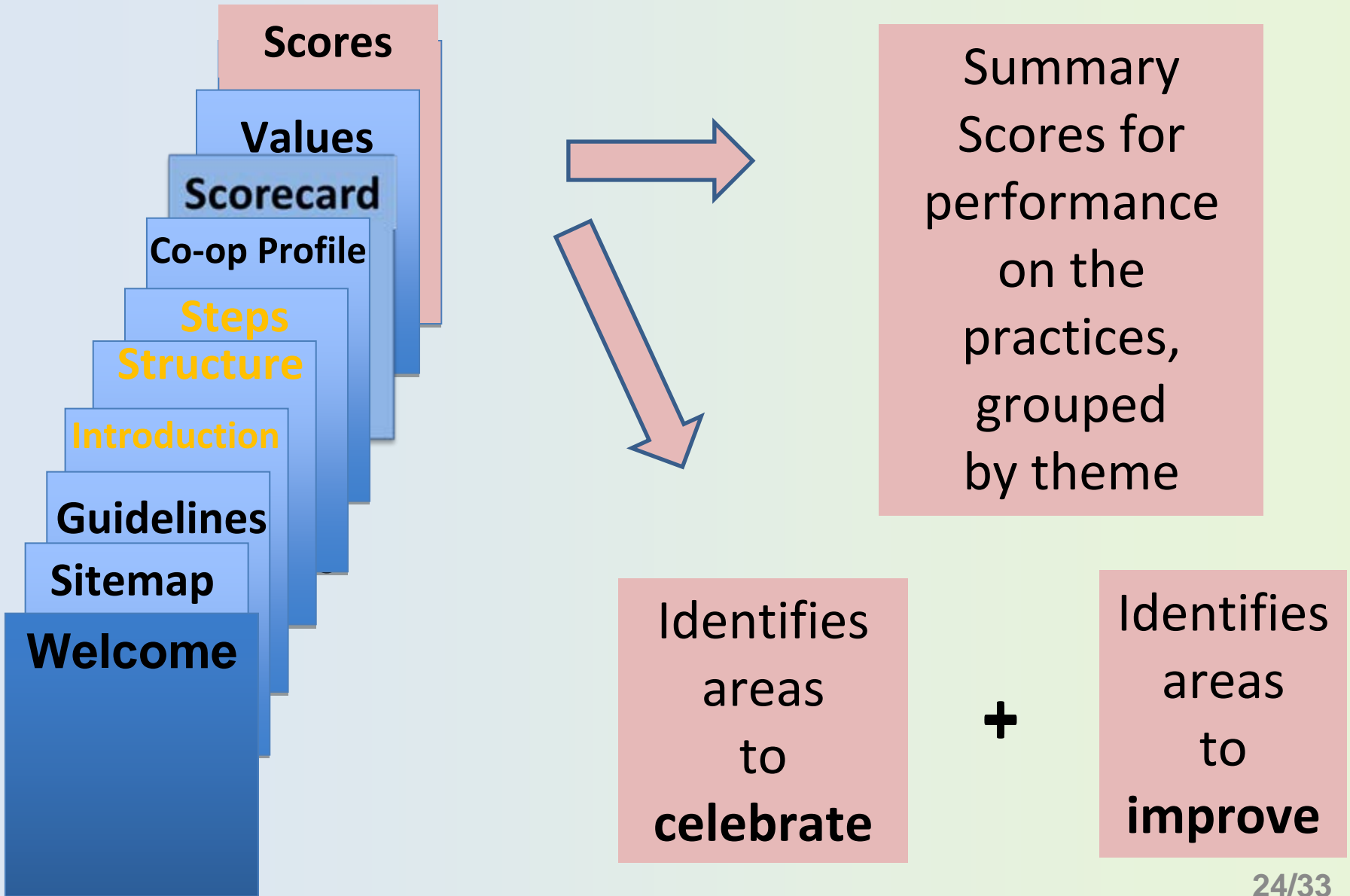
(A) Groups	(B) Total score (basic practices)	(C) Total potential score (# of basic practices x 5)	(D) ? Percentage score - basic practices (= B / C)	(E) Total score (all selected practices)	(F) Total potential score (# of selected practices x 5)	(G) ? Percentage score - all selected practices (= E / F)
Principle 1: Open and Voluntary Membership	0	25	0%	0	25	0%
Principle 2: Democratic Member Control	0	55	0%	0	55	0% ?
I. Compliance with By-Laws	0	5	0%	0	5	0% ?
II. Compliance with Provincial Co-operative Act	0	5	0%	0	5	0%

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# Summary Scores



# This tool provides information that helps your co-operative:

- Demonstrate the co-op's contribution to its primary stakeholders (members, employees and community)
- Provide them with ongoing opportunities to be engaged with their co-operative
- Help the board and the management team as they plan for continuous improvement

## AND:

- Engage employees in assessing and improving their place of employment;
- Recognize and report on your co-operative's *impact on community and the environment*;
- Demonstrate *transparency and accountability*;
- Foster greater *resilience, innovation, and sustainability*.

# Who has access to the data on each co-operative?

- Controlled access with password.
- The co-operative itself, and the researchers.
- Information on individual co-operatives is confidential.
- Each co-op decides how broadly to distribute its report.

# Available support

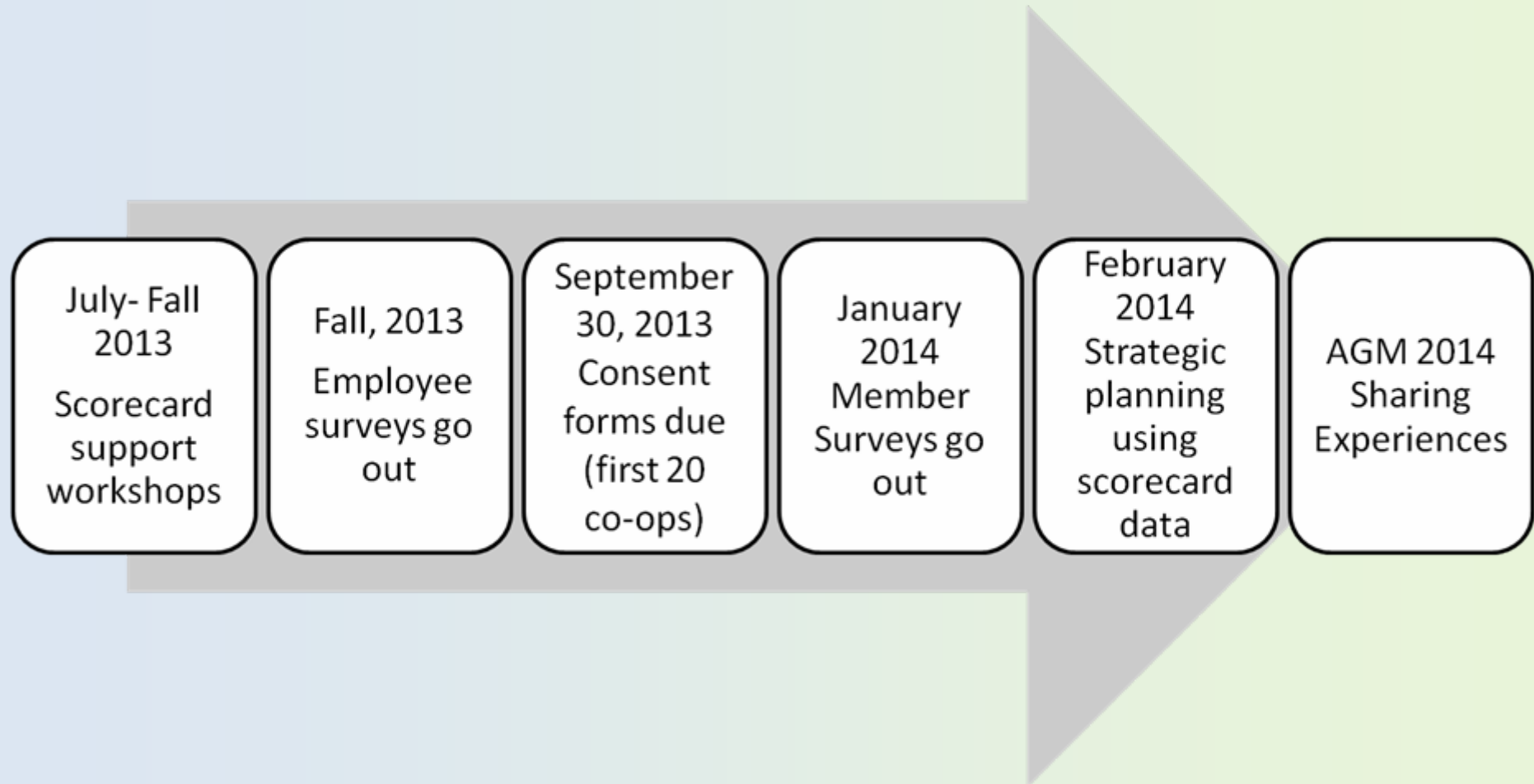
- Researchers will take part in your first working session (if possible).
- Training of a resource person from your co-op.
- After that, support will be available remotely (emails, Skype, phone calls...).
- “Moodle” site for documents transfer, chat room for participants and the development team.
- Preparation of reports (summary report, reports for the surveys of employees & members).



# Next steps?

- Participating co-ops, those who have signed the consent letter, complete the Scorecard.
- The researchers produce a summary report based on the data provided by the co-operative.
- Employee survey distributed. (Autumn 2013)
  - Co-ops will receive a report from the research team.
- Member survey distributed. (Winter 2014)
  - Co-ops will receive a report from the research team.

# Scorecard Implementation Timeline



<http://www.cooperativedifference.coop>

**Questions & Discussion.**

**Thanks!**

<http://www.cooperativedifference.coop>

# Information...

Coopproj@msvu.ca

Leslie Brown

[leslie.brown@msvu.ca](mailto:leslie.brown@msvu.ca)

Elizabeth Hicks

[elizabeth.hicks@msvu.ca](mailto:elizabeth.hicks@msvu.ca)

André Leclerc

[andre.leclerc@umoncton.ca](mailto:andre.leclerc@umoncton.ca)

Monique Bourque

[monique.bourque@coopatlantique.ca](mailto:monique.bourque@coopatlantique.ca)

Roméo Cormier

[romeo.cormier@coopatlantic.ca](mailto:romeo.cormier@coopatlantic.ca)

Léo LeBlanc

[leo.leblanc@coopatlantic.ca](mailto:leo.leblanc@coopatlantic.ca)

<http://www.cooperativedifference.coop>

