



Rosemary Mahoney
CEO



Walden Swanson
Founder and Chair

CoopMetrics - Introduction

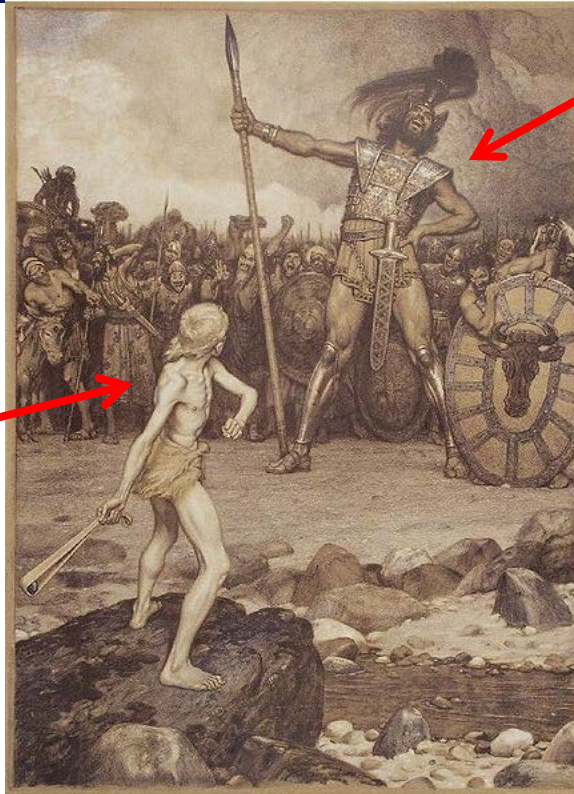
A “shared service” cooperative...

- Whose members share the costs of a sophisticated data warehouse
- Providing Fortune 500 quality business intelligence tools
- For locally owned independents, non-profits, and co-ops.



CoopMetrics – Tools for Davids Competing with Goliaths

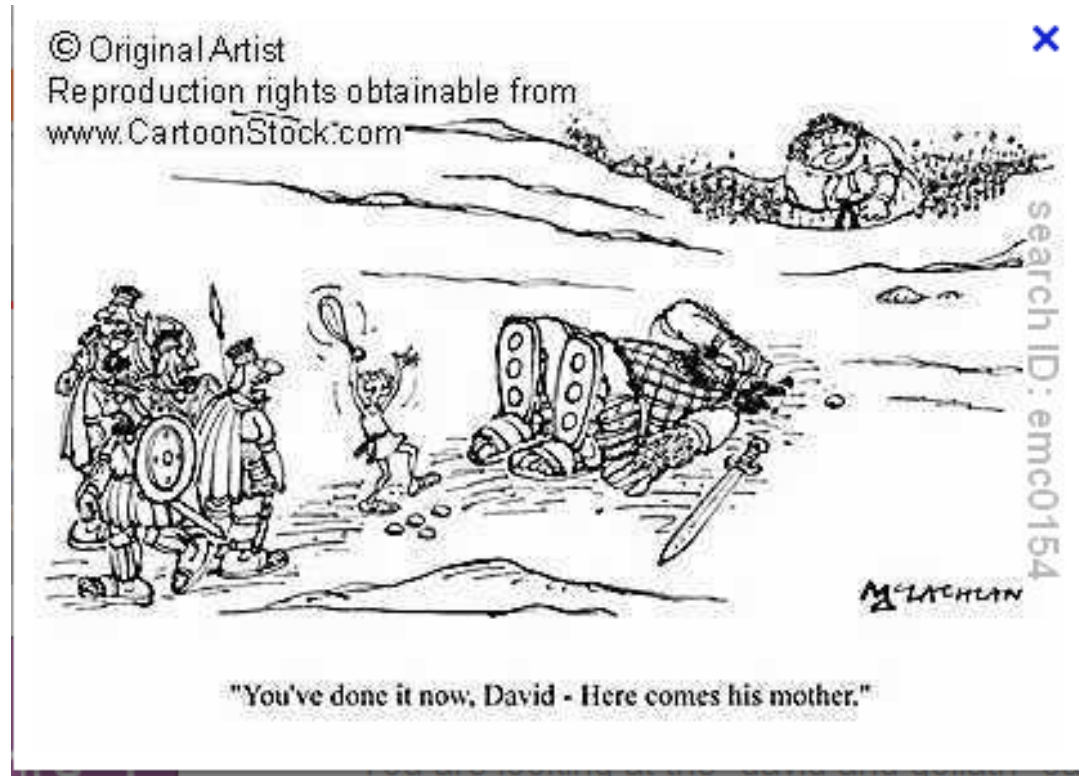
Co-ops
NonProfits
Locally Owned
CoopMetrics



Big Boxes
Public Chains
MultiNationals



CoopMetrics - Introduction





CoopMetrics Ownership Classes, BOD seats, & Distribution



Chuck Snyder
NCB - CEO



Brad Langhorst
CM CTO



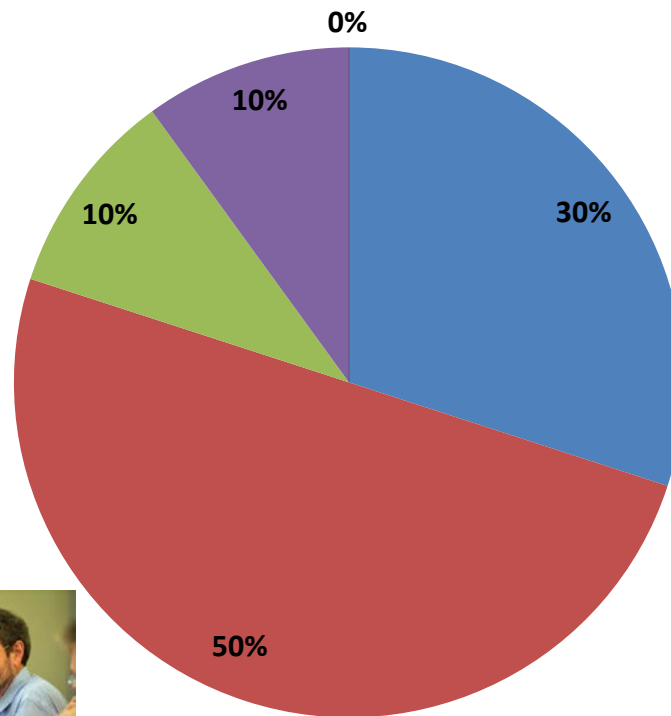
Walden Swanson
Founder and Chair



Terry Simonette
NCBCI - CEO



Robynn Shrader
NCGA - CEO



■ Consumers (2) ■ Workers (2) ■ Developers (0) ■ Founders (0) ■ Investors (2)



CoopMetrics - Sectors

- Retail Grocery
 - National Cooperative Grocers Association
 - Independent Natural Food Retailers Association (a cooperative)
- Agriculture
 - Grain / Farm Supply Cooperatives
 - Ethanol
- NonProfits
 - Affordable Housing Developers
 - The Data Collaborative – (the Foundation Cooperative)
- The Green House Project (Nursing Homes)

CoopMetrics

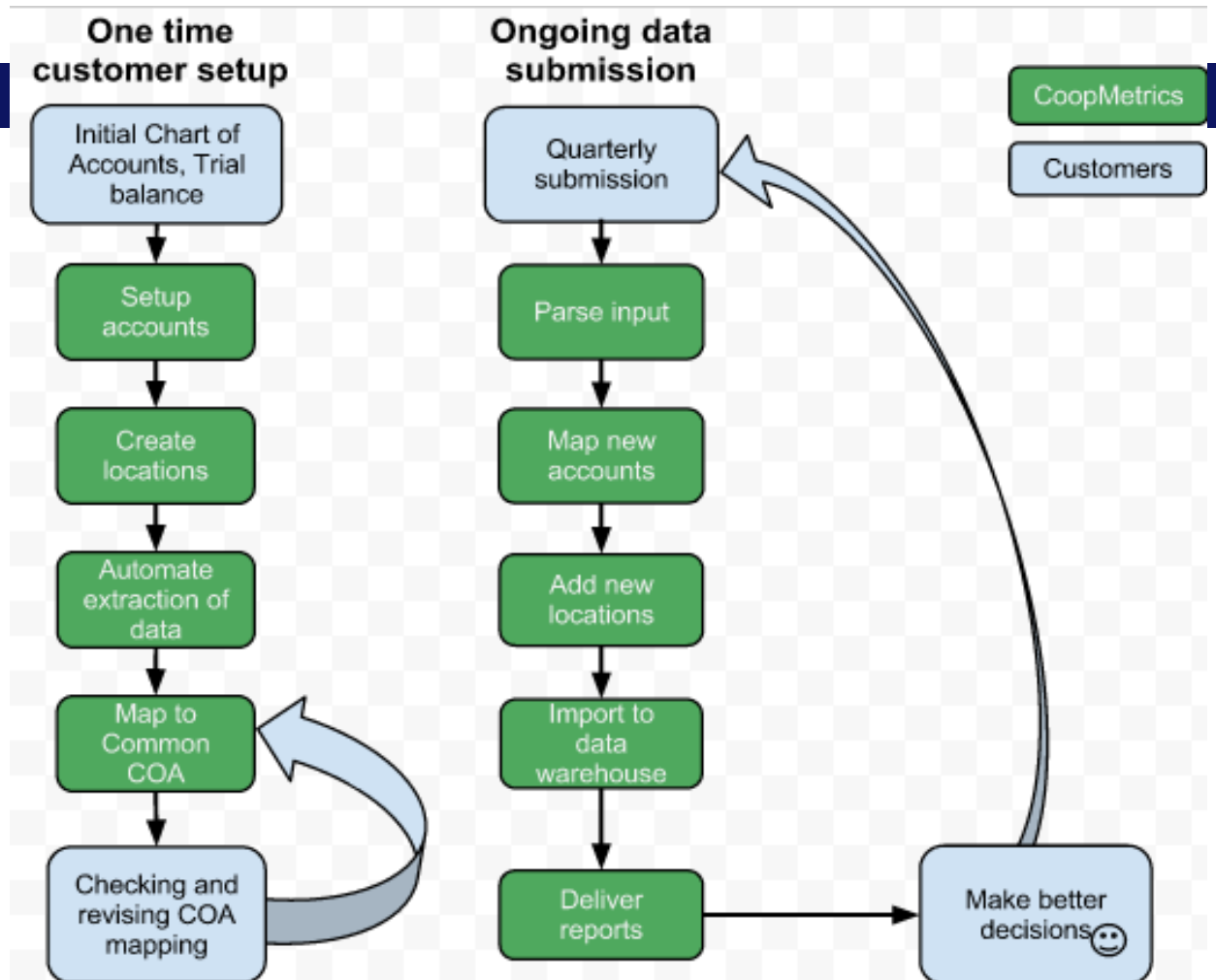
- How did such a small company
- Achieve what big companies said couldn't be done
- And do it so inexpensively and well?

CoopMetrics – What Worked

- Design of data warehouse
- Ease of data submission
- Focus on Tech; Partner with Sponsor
- Sharing benchmarking best practices across sectors



CoopMetrics Data Flow





Corporate Profile

Secure

User: D. Kemp Valentine

● General info

- Logoff

- Home

- Contact Us

- Privacy Policy

- Take a Survey

- Legal

- Housing Partnership
Network home page

● Reports & charts

- Send in data

- Inventory Adjustment

- View reports & charts

- Profiles

- My Surveys

● Administration

- Change Password

- View, Update, and Add



Profile Survey: 3/31/2006

Page 1 of 1, Category: default

1. Corporate Organization Type (Parent organization)

- Non-Profit
- For Profit
- Public Housing Authority
- Community Action Projects
- Cooperative
- Other

2. Business Lines

- Multifamily Rental Development
- Single Family Development
- Commercial Development
- Property Management
- Resident Services
- Ownership/Asset Management



8. Staff size - Corporate

- < 10
- 11 - 25
- 26 - 50
- 51 - 100
- >100

9. Service Area (The largest area you serve)

- Neighborhood
- City
- County/Region
- State
- Multi-State
- National

10. Regions

- Northeast
- Southeast
- Mid Atlantic
- Midwest
- Southwest
- Northwest
- California



Property Profile

Secure

User: D. Kemp Valentine

● General info

- Logoff
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Network home page

● Reports & charts

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Profile Survey: 1/3/2001

Page 1 of 1, Category: Property

1. Census Tract

2. Number of Units

Unit Mix

3. # of Studios

4. # of 1 Bedroom Units

5. # of 2 Bedroom Units

6. # of 3 Bedroom Units



Bottom Line Impact – Food Co-ops

Ten member co-ops of the Co-op Grocers Association (CGA) have been involved in a year long project using CoopMetrics tools to identify operational gaps in performance. \$800,000 of annual savings has been realized for the stores in the first year by making changes in systems in only one department per store.



COOPMETRICS
Strength in Numbers

Bottom Line Impact - Ethanol

One member of the ethanol group said that first year savings of \$2,000,000 could be attributed to participation in the program.



Cooperative Grocer

FOR RETAILERS AND COOPERATORS

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Chasing the Gap

BY [MEAD STONE](#)

[#140 JANUARY - FEBRUARY - 2009](#)

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[download pdf of article](#)

CoCoGAP is a data sharing program, a tool that measures a co-op's performance in key operational areas against the top 25 percent of other co-ops with similar sales. The "Gap" is the amount of additional profit your co-op might be able to realize each year if





GAP PROGRESS (rolling averages)	Baseline				Chng
	Q2 F08	Q3 F08	Q4 F08	Q1 F09	
Store Sales Growth	-0.1%	3.5%	5.3%	5.5%	5.6%
Sales/Labor Hour	\$92	\$92	\$93	\$94	\$2
Sales/Linear Foot	\$1,593	\$1,620	\$1,646	\$1,671	\$78
Margin	37.6%	37.4%	37.2%	37.4%	-0.2%
Labor % B4 Taxes and Benefits	18.2%	18.4%	18.1%	17.6%	-0.6%
Inventory Turns	13.5	14.2	15.4	16.4	21.6%
Margin Minus Labor	19.4%	19.0%	19.1%	19.8%	0.4%
Gross Profit Dollars Minus Labor Costs	\$837,000	\$833,000	\$848,000	\$896,000	\$59,000
Inventory	\$199,000	\$193,000	\$182,000	\$172,000	-\$27,000
Turns X Earns	2.62	2.71	2.93	3.26	24.3%



Policy Impact – Grain Marketing Co-ops

Using CoopMetrics' data, the Iowa Institute for Cooperatives was able to show concerned regulators that grain cooperatives were operating profitably, despite being out of compliance with current ratio, debt to asset and equity requirements. The cooperatives were operating profitably in a high operating debt environment. The regulator accepted that they were operating in a safe and sound manner.

Research – The Green House Project

GE Healthcare Finance Award for The Green House Project

September 22, 2011

Today, The Green House Project had the honor of accepting the GE Healthcare Award for Best Paper.