



# Co-operative Sustainability and Planning Practices: A Participatory Approach

Leslie Brown, Mount Saint Vincent University

Elizabeth Hicks, Mount Saint Vincent University

André Leclerc, Université de Moncton

June 2, 2011

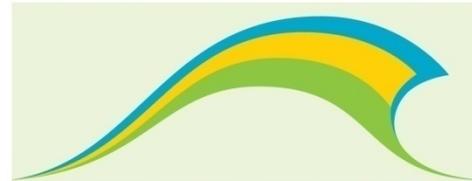
Canadian Association for Studies in Co-operation

Fredericton, New Brunswick

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# Today's Presentation – An Overview

1. Introduction and purpose of the presentation
2. Social responsibility reporting in Canada and the Co-operative Difference
3. Profile of our partner – Co-op Atlantic
4. Process to date of developing a sustainability and planning scorecard
5. Next steps and challenges



# 1. Purpose of Today's Presentation

- Share the process of developing a “Consumer Co-operative Sustainability & Planning Scorecard” using a participatory action approach
- Provide a sense of the content of the current version of the scorecard

# 1. Retail Grocery Industry

## - Trends

- Retail grocery outlets are bigger & offer more services
- Consumer concerns for the social implications, health and quality of food and the environment
- The rise of social responsibility reporting

## 2. Social Responsibility Reporting in Canada

- CSR reporting doubled in Canada 2001 – 2005 (Green, 2006)
- Many tools are available (GRI is the most widely used; ISO 26000 is catching on )
- GRI is used by large co-ops such as Desjardins, The Cooperators, & VanCity
- Can be costly for small co-ops

## 2. Is CSR reporting necessary for Co-ops?

- Co-ops are democratic member-owned organizations guided by Co-op Principles, therefore by their nature they are socially responsible and engage stakeholders

BUT

- Stakeholders include those external to the organization as well and
- Co-op Principles do not necessarily incorporate all dimensions of the triple bottom line e.g. the environment

## 2. CSR reporting can demonstrate the Co-op Difference

- Co-ops want to live up to their principles and to do so they need to develop measures, track performance, and report to members and to those outside the co-operative
- Many co-ops also believe that such reports have value as guides for strategic planning and for addressing sustainability

# 3. Co-op Atlantic

- Based in Moncton, NB & owned by a network of co-ops
  - 57 consumer co-ops
  - 15 agricultural societies
  - 33 other co-ops
- Engaged in retail, real estate, social housing, & energy (2010 sales of \$566.6M)
- Operates in 4 Atlantic provinces and Îles de la Madeleine

## 4. Developing the Scorecard

- Co-op Atlantic wanted to develop their own tool to meet their specific needs
  - Initially drew on Russ Christianson's model
- Chose a participatory approach
  - Co-op Atlantic personnel (3)
  - Academic researchers (3)
  - Employees & members of local co-ops & corporate stores organized into 8 pilot project committees (PPCs) (40)

## 4. Process & Timeline

1.RAC drafts version 1 of tool & recruits PPCs	June – Sept. '09
2. PPCs validate practices (workshops & PPCs work)	Oct. – Nov. '09
3. RAC re-drafts tool incorporating PPC feedback	Jan. – May '10
4. PPCs prioritize practices & RAC develops indicators for each practice	June – Sept. '10
5. RAC re-drafts tool to incorporate indicators & PPC feedback; PPCs validate indicators (workshops)	Oct. – Nov. '10
6. RAC re-drafts tool to incorporate PPC feedback & prepares instruction guide	Dec. '10 – Feb. '11
7. PPCs use the tool for their co-op	Mar. – April '11
8.Last revision by RAC prior to making tool available	April – May '11
9.RAC prepares user guide, surveys to accompany the tool & designs workshops	Summer '11
10.Review stakeholder engagement strategy & distribute tool within Co-op Atlantic (workshops)	Fall '11

# 4. Scorecard Revisions Sept. 2010 - Dec. 2010

Theme		Added	Deleted	Modified	Moved
Co-op Principles	Practices		3	13	
	Indicators	7	30	59	2
Economic Measures	Practices		3	6	
	Indicators		4	3	1
Social Measures	Practices	5	4	1	
	Indicators	10	3	12	
Environmental Measures	Practices			1	
	Indicators		4	4	
Total	Practices	5	10	21	
	Indicators	17	41	78	3

# 4. Scorecard Revisions

## Indicator Review Dec. 2010 - March 2011

Theme		Added	Deleted	Modified	Moved
Co-op Principles	Practices	1	5	12	
	Indicators	17	19	79	
Economic Measures	Practices	1	3	8	
	Indicators	6	6	14	1
Social Measures	Practices	1		9	
	Indicators	31	4	26	3
Environmental Measures	Practices			1	
	Indicators		4	4	
Total	Practices	3	8	30	
	Indicators	54	33	123	4

# 4. Scorecard Revisions Pilot Phase as of May 2011

Theme		Added	Deleted	Modified	Moved
Co-op Principles	Practices			2	
	Indicators			8	
Economic Measures	Practices			2	
	Indicators	1	1	2	
Social Measures	Practices			3	
	Indicators	11	1	11	
Environmental Measures	Practices				
	Indicators			1	
Total	Practices			7	
	Indicators	12	2	22	

# 4. Nature of the Scorecard

## 1. Co-op profile

- General information on the co-op such as governance, location & financial

## 2. 4 Themes

- 7 Co-op principles
- Economic measures
- Social measures
- Environmental measures

## 3. Scorecard summary

- Summarizes the scores on the co-op's performance in relation to each of the themes
- Identifies areas to celebrate and areas to improve

# 4. Theme Elements

1. Practices to enhance co-op sustainability
  - Dictated by legislation and co-op by-laws
  - Reflect good management & policies
  - Reflect respect for stakeholders
2. Indicators measure the extent to which a practice is followed
  - Quantitative & qualitative measures
  - Comments
  - Some are based on surveys

# Principle 1 – Democratic Member Control

	PRACTICES & INDICATORS	Reporting Year Ended 20__			
		Practices		Indicators	
		Level of Use	Priority	Metric	Benchmark
1	Engagement with Co-op Atlantic system				
	The Co-op Board has a process that ensures that representatives will attend the Co-op Atlantic AGM & report back				
A	% of co-op's allowable number of representatives that attended the most recent Co-op Atlantic AGM				100%
B	Representatives report to a next board meeting following the Co-op Atlantic AGM (yes /no)				yes
C	Co-op representatives to the Co-op Atlantic AGM report back to the				

## 5. Next Steps & Challenges

- Launching the tool in Fall 2011
- Encouraging co-ops to use the scorecard
- Continuing the research element of the work, in partnership with the local co-ops
- Making the scorecard user friendly
- Adapting the tool for others within the Co-op Atlantic system (different sizes and types of co-op) and outside the Co-op Atlantic system

# 5. Conclusion

The scorecard is intended to be useful:

- for sustainability self evaluation and planning purposes;
- for helping a co-op stay on track;
- by providing information for social responsibility reporting thus enabling a co-op to demonstrate its contribution to its stakeholders including its members, employees and community; and
- by providing them with ongoing opportunities to be engaged with their members.



**THANK YOU !**

**QUESTIONS?**