Consumer Co-operative Sustainability and Planning Scorecard

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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
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

Scores
Values
Scorecard
Co-op Profile
Steps
Structure
Introduction
Guidelines
Sitemap
Welcome

Employee Survey

Member / Owner Survey
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 about the Co-op Atlantic Co-operative Sustainability Practices and Planning Scorecard, and its role in achieving the co-op's mission.
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

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

<table>
<thead>
<tr>
<th>Principle 1 - Open and Voluntary Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group</th>
<th>Practices &amp; Indicators</th>
<th>Practices</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Score</td>
<td>Priority</td>
</tr>
<tr>
<td>1</td>
<td>The Co-op makes sure that the official membership list is updated at least once a year.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>Yes / No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td># of times that the Co-op updated the membership list over the year</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Consumer Co-operative Sustainability and Planning Scorecard**

Measuring our Performance on the Co-operative Difference

**Section 1: Seven Co-operative Principles**

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### Principle 1 - Open and Voluntary Membership

Co-operatives are voluntary organizations, open to membership, without gender, social, racial, political, or religious barriers. Co-operatives are open to all people willing to accept the responsibilities of membership, to carry out the principles and the purposes of the co-operative.

<table>
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<tr>
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<th>Practices &amp; Indicators</th>
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<th>Indicators</th>
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<td>B</td>
<td>Number of times that the Co-op updated the membership list over the year</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Basic Practices*</th>
<th>Associated Practices**</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Practices</td>
<td>Indicators***</td>
</tr>
<tr>
<td>7 Co-op Principles</td>
<td>29</td>
<td>104</td>
</tr>
<tr>
<td>Econ. Measures</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Social Measures</td>
<td>11</td>
<td>51</td>
</tr>
<tr>
<td>Environ. Measures</td>
<td>7</td>
<td>36</td>
</tr>
<tr>
<td>Total</td>
<td>52</td>
<td>209</td>
</tr>
</tbody>
</table>

* Identified in the Scorecard by integers  
** Identified by decimal numbers  
*** Identified by letters
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.

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

Work with basic & associated practices.
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**

Measuring our Performance on the Co-operative Difference

**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

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.

<table>
<thead>
<tr>
<th>(A) Groups</th>
<th>(B) Total score (basic practices)</th>
<th>(C) Total potential score (# of basic practices x 5)</th>
<th>(D) Percentage score - basic practices (= B / C)</th>
<th>(E) Total score (all selected practices)</th>
<th>(F) Total potential score - all selected practices (# of selected practices x 5)</th>
<th>(G) Percentage score - all selected practices (= E / F)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principle 1: Open and Voluntary Membership</td>
<td>0</td>
<td>25</td>
<td>0%</td>
<td>0</td>
<td>25</td>
<td>0%</td>
</tr>
<tr>
<td>Principle 2: Democratic Member Control</td>
<td>0</td>
<td>55</td>
<td>0%</td>
<td>0</td>
<td>55</td>
<td>0%</td>
</tr>
<tr>
<td>1. Compliance with By-Laws</td>
<td>0</td>
<td>5</td>
<td>0%</td>
<td>0</td>
<td>5</td>
<td>0%</td>
</tr>
<tr>
<td>11. Compliance with Provincial Co-operative Act</td>
<td>0</td>
<td>5</td>
<td>0%</td>
<td>0</td>
<td>5</td>
<td>0%</td>
</tr>
</tbody>
</table>

2013 AJHQap
Summary Scores

Identifies areas to celebrate

Summary Scores for performance on the practices, grouped by theme

Identifies areas to improve

24/33
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

- July- Fall 2013: Scorecard support workshops
- Fall, 2013: Employee surveys go out
- September 30, 2013: Consent forms due (first 20 co-ops)
- January 2014: Member Surveys go out
- February 2014: Strategic planning using scorecard data
- AGM 2014: Sharing Experiences

http://www.cooperativedifference.coop
Questions & Discussion.

Thanks!

http://www.cooperativedifference.coop
Information...

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