The Co-operative Sustainability and Planning Scorecard: a Tool for Retail Food Co-operatives

Researchers: L. Brown (MSVU), E. Hicks (MSVU), A. Leclerc (U de M)
Community Partners: M. Bourque, R. Cormier, L. Leblanc, (Co-op Atlantic)

Co-operating for Change Conference
June 26, 2012, Montréal, Québec
Main Partners

http://www.cooperativedifference.coop
Today’s Presentation

- The purpose of this tool

- The tool content

- Rolling out the tool – our experiences to date

- What’s next
The Consumer Co-operative Sustainability and Planning Scorecard is Designed to…

- Engage member-owners, employees and other stakeholders in assessing and improving their co-op
- Identify and assess the co-op’s performance on the co-op difference
- Support strategic planning, ongoing operations and governance
- Recognize and report on the co-op’s impact on its community and the environment
- Demonstrate transparency and accountability
- Foster greater resilience, innovation and sustainability
Okay, so what does this tool look like?

- Title Page
- Introduction
- Contents
- Structure
- Steps
- Co-op Profile
- Scorecard
- Values
- Scores
- +
- Employee Survey
- +
- Member / Owner Survey
The Sustainability and Planning Scorecard

Scores

Values

Scorecard

Co-op Profile

Steps

Structure

Contents

Introduction

Title Page

7 Co-op Principles
(29 Basic & 36 Associated Practices)

Social Measures
(11 Basic & 19 Associated Practices)

Economic Measures
(5 Basic & 11 Associated Practices)

Environmental Measures
(7 Basic & 13 Associated Practices)
Summary Scores

Scores

Values

Scorecard

Co-op Profile

Steps

Structure

Contents

Introduction

Title Page

Summary Scores by sub-theme; theme; and for co-op as a whole

Identifies areas to improve

Identifies areas to celebrate

Introduction

Title Page

Contents

Structure

Steps

Co-op Profile

Scorecard

Values

Scores
A Flexible Tool
Designed to Grow with the Co-op

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
RAC and PPCs developed the scorecard 2009-2012.

Co-op Atlantic’s Legacy Project:
- Developed video for Member Relations meetings
- Presented at Retail Managers Conference Feb. 2012
- Presented at Area Meetings April 11 – May 2, 2012
- Scorecard Workshop May 24, 2012

Scorecard Rollout:
- Presented at Cluster meeting Feb. 2012
- Presented at Retail Managers Conference Feb. 2012
- Presented at Area Meetings April 11 – May 2, 2012
Benefits of Using the Scorecard as Identified at Feb. and May Events

- Helps the co-op to compete with big chains
- Helps the board of a new co-op become familiar with the co-op model
- Helps the co-op self-evaluate and take action
- Identifies areas where attention needed to be given (resulted in increased membership)
- Identifies areas to improve & areas done well.
- Creates awareness of how a co-op differs
- Engages the board & enhances ability to work as a team
- A practical tool showing meaningful results
Addressing Challenges Identified at Feb. and May Events

- **Needs to be user-friendly**
  - Changed format of the tool & added automatic functions
  - Split practices into Basic and Associated
  - Created a one page document about the Scorecard

- **Time required to complete the Scorecard**
  - Focus on the scorecard’s flexibility and ability to grow with the co-op

- **Need to have manager buy-in**
  - Presentation to managers
  - Assurances that scores will not impact on manager performance evaluations
Addressing Challenges Identified at Feb. and May Events Continued

- **Encouraging co-ops to participate**
  - Ability to compare a co-op’s performance with that of all participants as a group
  - Providing 2 surveys along with an analytical report of the results
  - Focus on areas of interest to the co-op or areas identified as a challenge for the particular co-op
  - Recognition awards
  - Availability of resources and support
Addressing Challenges Identified at Feb. and May Events Continued

• **Need for support and resources**
  - Access to on-line resources & guide
  - Support person available to work with individual co-ops.
  - Create a community of practice to support co-ops in using the tool and provide on-going follow-up
  - Employee and Member/customer surveys will be provided & researchers will a report to the co-op on the survey results
What Workshop Participants Had to Say

“Can’t wait to see this in practice”

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

“Can’t wait to see this in practice”

“Really good program – anxious to start using”

“The tool is definitely an excellent evaluation tool, it is necessary to embed this in our co-operative”

“Every co-op needs to take part in this project without exception”
What’s Next?

• Developing a user-friendly web version
• Recruit co-ops
• Finalize surveys
• Finalize instruction guide & resource site
• Provide training & assistance for co-ops
• Administer surveys and prepare reports for co-ops
• Investigate use of tool by co-ops and its impact, if any, on each participating co-op
For More Information...

Researchers

Leslie Brown - MSVU
leslie.brown@msvu.ca

Elizabeth Hicks – MSVU
elizabeth.hicks@msvu.ca

André Leclerc – U de M
andre.leclerc@UMCE.CA

Community Partners – Co-op Atlantic

Monique Bourque
Monique.Bourque@coopatlantique.ca

Roméo Cormier
Romeo.Cormier@coopatlantic.ca

Léo LeBlanc
leo.leblanc@coopatlantic.ca
What Workshop Participants Had to Say

– “the tool is definitely an excellent evaluation tool, it is necessary to embed this in our co-operative”
– “Can’t wait to see this in practice”
– “Very good, logical program and easy to use. Necessary tool for the survival for many co-ops”
– “Every co-op needs to take part in this project without exception”
– “Really good program – anxious to start using”
Comments from May 2012 Workshop

• Most interesting and useful aspects of the workshop ....
  – “Associated practices. Summary tab is awesome!”
  – “Regular use of the co-op profile date could be very beneficial”
  – “Should be helpful to identify areas to improve and promote the things you are performing well.”
  – “Co-operation among different co-ops. I liked the fact that Coop Atlantic supports this project at 100%”
  – “The practical application of the tool”
  – “That this data can be collected and show meaningful results”
Comments from May 2012 Workshop

- Additional support our co-op will require, or like to have, in order to use the scorecard?
  - A resource person / team while they work through the tool
  - Help with the surveys
  - All benchmarks
  - Assistance to do planning report or action list upon completion of the Scorecard
  - On-going follow-up
  - Some guidance with details
Comments from February 2012 Team Meeting

• We are a new co-op with big chain competition. The tool will help the board and others who are not familiar with the co-op model.

• Started realizing while working with the tool that there were areas of the tool that related directly to our co-op at that point (e.g. lack of connectedness with the community) so we began new community initiatives resulting in increased membership and community awareness of the co-op model.

• Governance was enhanced by working with the tool. Board members wanted to be heard.
Comments from February 2012 Team Meeting

• “I believe the scorecard project is realistic & feasible, and will have positive impacts on our co-ops when it’s put to use!”

• “As a topic, sustainability planning is important. I hope that this scorecard will actually make the co-ops more sustainable and more integrated in their community”

• “I can’t wait to see how it’s going to move forward and become a reality! Just working through the sample part that we were charged with helping with, our co-op already got a better idea of where we were at in our organizational development, and what our strengths are!”
Comments from February 2012 Team Meeting

• “….It is a powerful tool, and it has uses beyond consumer co-ops, and beyond Co-op Atlantic, so we need to move this forward.”

• “When a board accepts to take this on, and then spend over 8 hours together in order to complete the work, I can attest that there is a rather special “meeting of the minds” that happens, that will change that board in some way, and have lasting positive effects on their ability to work together as a team...”

• “I work with the managers. I see a lot of challenges in my job, and I think that this is going to be helpful in finding solutions”