



Co-operative Sustainability and Planning Practices: Lessons from Consumer Co-operatives in Atlantic Canada

The *Co-operative Sustainability and Planning Practices* project centred on the development of the **Consumer Co-operative Sustainability and Planning Scorecard** ("Scorecard").

The **Scorecard** is a self-assessment and planning tool that measures co-operative sustainability, including social, economic and environmental performance, in relation to targets and priorities set by the co-operative's key stakeholders.

Research Team

The project involved a broad partnership:

Academic researchers:

- Elizabeth Hicks [Mount Saint Vincent University](#)
- André Leclerc [University of Moncton](#)
- Leslie Brown [Mount Saint Vincent University](#)

Co-op Atlantic Head Office:

- Leo Leblanc [Corporate Secretary and VP of Human Resources & Corporate Affairs*](#)
- Romeo Cormier [Manager of Public Affairs*](#)
- Monique Bourque [Corporate Marketing & Communications Manager*](#)

** The above individuals have all since retired from the organization*

Graduate Student Research Assistants:

- Jeff Cheverie
- Launa Gauthier
- Bonnie Petersen
- Maureen Green
- Andrea Rex

Seven Individual Retail Co-operatives across Nova Scotia and New Brunswick -

The Pilot Project Co-operatives:

- La Coopérative de Chéticamp
- Musquodoboit Valley Co-op
- La Coopérative de Saint-Louis
- Morell Consumers Co-op
- Co-op Regional de la Baie (Tracadie)
- La Coop de Consommation de Dieppe
- La Coopérative de Caraquet

Community-based Research in Action: Pilot Project Co-operatives

The research team included dozens of volunteer members of retail co-operatives from across Atlantic Canada, such as Siri Jackson-Wood of Morell Consumers Co-op and Aquila Comeau of Co-op Regionale De La Baie Ltée - Tracadie, both pictured below.

These community-based volunteers actively participated in developing and testing the Scorecard tool, based on their real-life experiences as board-members, managers, and customers.



The Online Scorecard Tool

Working collaboratively, the research team created and tested an electronic version of the Scorecard which allows retail grocery stores to measure and track their progress from year to year on a variety of indicators.

See example indicators below:

SCORECARD Area of Assessment	Example Indicator
<input checked="" type="checkbox"/> DEMOCRACY	Degree of member involvement & engagement in store activities
<input checked="" type="checkbox"/> EDUCATION & TRAINING	Provision of leadership development opportunities for members and staff
<input checked="" type="checkbox"/> CO-OPERATION WITH OTHER CO-OPS	The store's involvement in its provincial co-op association
<input checked="" type="checkbox"/> CONCERN FOR COMMUNITY	Level of employee participation in community volunteering
<input checked="" type="checkbox"/> CUSTOMER SATISFACTION	Satisfaction with quality of products, satisfaction with courteousness of employees
<input checked="" type="checkbox"/> EMPLOYEE SATISFACTION	Satisfaction with competitiveness of wages
<input checked="" type="checkbox"/> ENVIRONMENTAL SUSTAINABILITY	Extent to which the store pursues local and ethical purchasing practices
<input checked="" type="checkbox"/> ECONOMIC SUSTAINABILITY	Whether the store implements participatory budgeting processes
<input checked="" type="checkbox"/> STRATEGIC REPORTING	Degree and quality of communications between management and board

Would you like to learn more about the Scorecard & see what it looks like ?

[One-page overview + sample Q's](#)
Includes a wide variety of *sample questions*.

[Slide presentation overview](#)
A slightly more detailed overview, includes screen shots from the online tool.

[Book chapter](#)
(*most detailed*)
Describes the Scorecard, the rationale for its development, the process of development and testing, and reflections on its implementation.

WHAT DOES THE SCORECARD ALLOW RETAIL CO-OPERATIVES TO DO?

- Helps co-operative boards to assess their performance on financial, social and environmental aspects of their operations, and guides them in strategic planning;
- Provides co-operatives with the ability to assess their adherence to [universally recognized co-op values and principles](#);
- Gives co-ops an opportunity to survey both members and employees (*both member and employee satisfaction surveys are included with the Scorecard*);
- Allows co-ops to choose their own priorities, and then helps them stay on track in meeting them, year-to-year;
- With repeated use, provides co-ops with data that enables them to demonstrate the *co-operative difference* they make in their communities.

RESULTS OF THE PROJECT

Participating in the project was a positive experience for the partnering co-ops:

The Pilot Project Co-operatives reported appreciating the following elements of the Scorecard tool:

- It measures *concrete things*, so results can be tallied, scored, and compared with other co-ops and with previous years' performance.
- It is *customizable and flexible*:
 - Each year, co-ops get to choose which areas of the Scorecard they want to focus on.
 - The way the results are scored depends on which areas were identified as priorities for the co-op that year.
- It identifies "*areas to celebrate*" and "*areas to improve*" - customized areas that relate to the co-op's own priorities. Scorecard users found this helped motivate and engage them with the process.
- It calculates results *automatically*: once the co-op completes the Scorecard, results are immediately available, and can be easily compared with other co-operatives' scores, or their own past performance.

Project successes:

- This was a truly community-led project. The pilot co-ops took the lead in creating the Scorecard: they decided which questions were important to ask, and how each indicator should be measured.
- The pilot co-ops spearheaded an initiative to create special *surveys* for co-op member-shoppers and co-op employees, to address the requirement for member and employee input in some sections of the Scorecard. These supplementary tools are now available to all co-ops using the Scorecard, to help them measure both customer and employee satisfaction.

WHAT ARE THE BENEFITS OF USING THE SCORECARD?

Researchers found that the Scorecard and accompanying surveys can help a retail grocery co-op to:

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| ✓ identify and assess performance on the co-operative difference; |
| ✓ obtain information for strategic planning and continuous improvement; |
| ✓ engage member-owners in assessing and improving their co-operative; |
| ✓ engage employees in assessing and improving their place of employment; |
| ✓ recognize and report on the co-operative's impact on the community and the environment; |
| ✓ demonstrate transparency and accountability; |
| ✓ foster greater resilience, innovation and sustainability; |
| ✓ compare the co-operative's performance to the overall patterns for retail co-operatives in the Atlantic region. |

Project impacts:

Even during this early phase of developing and testing the tool, the Scorecard had positive impacts on the pilot co-operatives and the way they do business in their communities:

- The pilot co-ops reported a positive impact on the **level of engagement of Board members and management** in the operations of their co-op: by working through the Scorecard questions together, Board and management were compelled to explicitly discuss what their co-operatives' priorities were. This, in turn, led to:
 - o **increased clarity and transparency** around the co-op's activities;
 - o Board members feeling encouraged to become **more active decision makers**;
 - o **stronger social cohesion** among Board and management team.

The researchers saw this as an indication that if co-ops were to use the Scorecard on a regular basis, even greater levels of engagement and team cohesion could result.

- As part of the process of developing and testing the tool, pilot co-ops reported becoming aware of **new activities** they could be engaging in, that had not previously been on their radar, such as:
 - o focused strategic planning activities;
 - o ensuring staff are better informed about the operations of the co-op.
- Co-ops also became more aware of their **identity as co-operatives** and how this sets them aside from investor-owned companies (IOCs). The pilot co-operatives began to say, "As co-ops, we could do better than IOCs in these areas."
- The supplementary member and employee surveys ended up having greater value than anticipated: simply through the act of taking the supplementary surveys, both shopper-members and store staff began to think more about their co-op, and **what it means for them to be part of a co-operative business**.

Project Learnings:

Through the process of developing and testing the Scorecard, the research team learned that:

Retail grocery co-ops have a **genuine interest** in measuring their sustainability.

Retail grocery co-ops tend to prioritize sustainability measures that are **specific** to the retail grocery co-operative business.

E.g. the co-ops were more interested in measuring what percentage of the food on their shelves is locally sourced than what percentage of their office paperwork is recycled.

Retail grocery co-ops are interested in measuring their ability to implement the **co-operative principles**.

E.g. concerning the 5th principle of Education, the pilot co-ops wanted to find ways to concretely measure the degree to which they provide educational opportunities for members, employees and the general public.

Project Reflections:

- It is a **significant challenge** for co-ops to make use of a tool like the Scorecard in a **period of crisis**, particularly for smaller co-operatives with limited human resources:
 - o the complexity of the process, along with the time required to complete the tool, can be a strain on board members, employees and volunteers who are already struggling to ensure the co-operative's survival.
 - o Many of the benefits of the Scorecard relate to helping plan for the future; in a crisis situation it is hard to feel engaged with a future-oriented process.

Here are links to articles about the challenges facing the Pilot Project Co-operatives (Co-op Atlantic stores) during the piloting of the Scorecard tool:

In English:

[Co-op Atlantic lays off 400 employees: 4 remaining grocery stores in N.B., P.E.I., and N.L. will also close](#)

CBC News: Jun 25, 2015

In French:

[Les coopératives signent avec Sobeys](#)

Par Anthony Doiron - Acadie Nouvelle - 3 juin 2015

NEXT STEPS:

- ✓ The Scorecard has now been extensively tested and refined. The research team is working to make it available for other retail co-op to use and adapt, through easy online access.
- ✓ The researchers will collect the data from co-operatives that elect to use the tool, and will use this information to create a profile of co-ops in the Atlantic region, as well as developing benchmarks for other co-ops to compare themselves to.

[FOR MORE INFORMATION:](#)

coopproj@msvu.ca