

COLLECTING

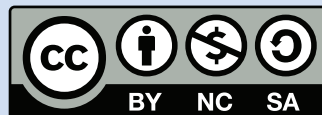
OURSELVES



**A Cooperative
Entrepreneurship Curriculum**

COLLECTING OURSELVES: A COOPERATIVE ENTREPRENEURSHIP CURRICULUM

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Authored for the Kris Olsen Traveling Cooperative Institute program of Northcountry Cooperative Foundation by Emily M Lippold Cheney in 2015-2016

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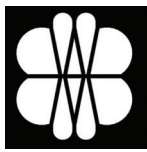
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ACKNOWLEDGEMENTS

Many groups and individuals contributed to the creation of this curriculum. First and foremost, thanks go to the many Kris Olsen Traveling Cooperative Institute (TCI) program participants whose feedback played a tremendous role in shaping and improving the curriculum.

Others who provided content, edited, reviewed, or advised the curriculum's creation are, in no particular order: Toolbox for Education and Social Action, CooperationWorks!, Nat Locke, Firestorm Bookstore and Cafe, Win Win Coffee Bar, Equal Exchange, Practicing Freedom Collective, and Design Action Collective.



It is due to the support of Northcountry Cooperative Foundation's leadership and had faith in the vision to take the TCI program in a new direction that led to the authoring of this curriculum. TCI's namesake, Kris Olsen, deserves appreciation for his years of driving a truck around the region helping to build our regional cooperative movement and inspiring this work.

Both the US Department of Agriculture and the CHS Foundation provided considerable financial support. Without that provided funding, the scope and scale of such a program would have been impossible.



Committed to the future of rural communities.



CHS FOUNDATION

A resounding thank you is extended to all those past and current members of the #coopyouth movement, for whom this curriculum was initially designed. The creativity and persistence of the #coopyouth movement maintain the broader cooperative movement's imagination and bring to life the positive feelings of liberation and peace towards which we are working.

This curriculum is dedicated to all people working for racial justice in the US. During some of the TCI trainings, participants discussed the role cooperatives can play in struggles for justice, as well as how some cooperatives that have not held to their Principles and Values have contributed to injustice. In line with this, this dedication is also a commitment to using cooperative entrepreneurship to build an intersectional cooperative movement. #blacklivesmatter

LETTER FROM THE AUTHOR



June 2015
Minneapolis, Minnesota

When I first envisioned this curriculum, it was my intention to create a resource to guide young people, with any level of cooperative experience, to begin work in the cooperative movement. I pictured young people educating themselves in the “why” of cooperative entrepreneurship and, following, empowering themselves with the “how.” At the time I chose to develop this curriculum, cooperative entrepreneurship resources were piecemeal and scattered across formats and organizations - or, they were only accessible in a comprehensive way to closed groups. Creating this resource took two years of work that strengthened my understanding of the philosophy and practice of cooperative entrepreneurship, the nature and importance of peer learning, and the monstrous task of turning a set of workshops into a cohesive curriculum.

Midway through the first draft, I went on the road in the Upper Midwest to facilitate trainings using the methods and materials I had curated and created. As part of my methodology, I spent many daylight hours biking through rural towns, talking to people, and visiting local stores, libraries, and museums. I would often sleep in the backseat of my car and wake up to a beautiful landscape - next to an expansive lake in the Dakotas or in the lush Wisconsin northwoods. I saw and learned so much about the region I call home - particularly about the beauty, history, and importance of collective work in Upper Midwestern communities.

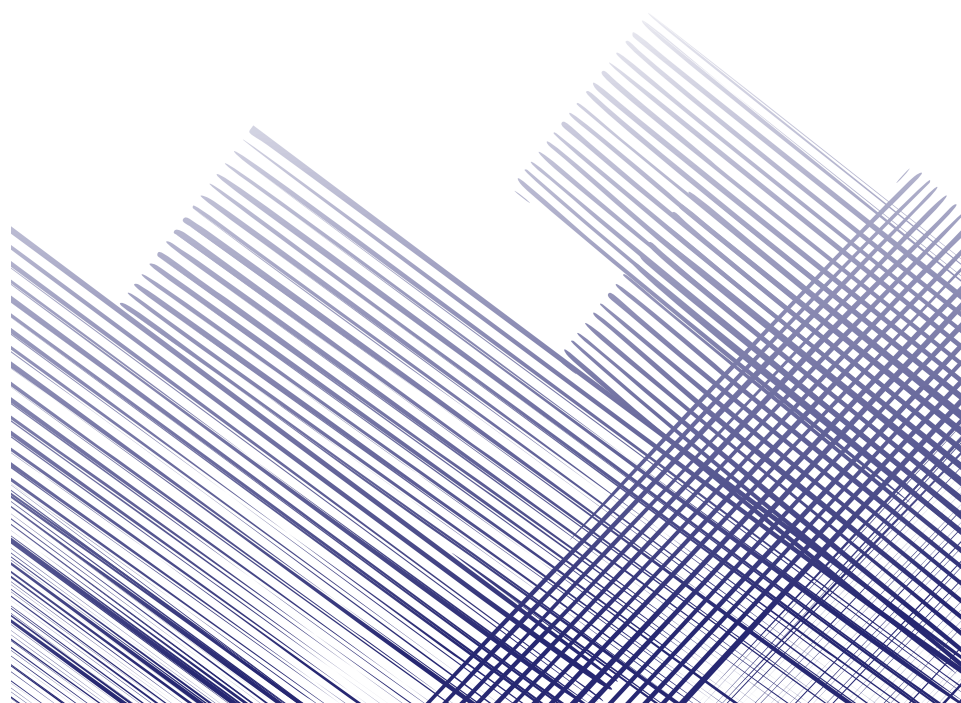
I discovered much complexity in my region’s history of collective action. While in North Dakota, I heard both high praise for and strong resistance to the booming extractive industry in the Bakken Fields. I witnessed the aftermath of resource colonization throughout the Upper Peninsula, which led to the deepening of my understanding of the work the Dakota, Ojibwa, and other Native communities have been doing for centuries to steward these lands. I visited some of the remaining vestiges of the cooperative retail and distribution system built a century ago by Finnish settlers. I also stopped in towns with newer “natural foods” cooperatives and heard residents complain about the store’s prices and culture with comments such as, “That store is not for me.” One general manager of an old Finnish

cooperative told me, “We’re a cooperative because we’re owned by the community, not because we sell fancy food.”

When reflecting on what I witnessed and learned, it has become increasingly clear to me that the complex context in which we do the work of building cooperative enterprises cannot be ignored. My sincere hope for this resource is that it can serve as a tool to support people in efforts to not simply pursue cooperative entrepreneurship, but to do so in a way that contributes to halting patterns of harm in their lives and communities. We are not just creating things with our friends; we are responding to and resisting models and cultures of organization that perpetuate injustice and hurt. Building cooperative businesses, if done with this both grand and fundamental intention, can be a way to contribute to necessary healing and the building of a better world.



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LICENSING

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This licensing choice was made in service to the task of building a commons of cooperative development education resources.

The best edits made to this curriculum came out of feedback received from those who used it as trainers and trainees. Any feedback from future trainers and trainees will help to continue to evolve and improve this resource. If you would like to share your edits for inclusion in future iterations of this curriculum, please get in touch with the author via email: emily@northcountryfoundation.org.

For suggestions on how to adapt and improve this work for your unique audience and needs, review "Using the Curriculum: Adaptations."

HISTORY & METHOD

CURRICULUM HISTORY

The enclosed curriculum and accompanying materials were developed between 2014 and 2016 as part of an iteration of the Kris Olsen Traveling Cooperative Institute (TCI) program that focused on reaching young people residing in rural areas of the Upper Midwest. The TCI program is an offering of the Northcountry Cooperative Foundation (NCF), which has been providing cooperative development and education through a seven state region since 1997. The curriculum's authoring was supported by many members of the cooperative development and education communities whose contributions ranged from direct collaboration to consultation. The curriculum was introduced on the training circuit in July of 2014, with each training session over the subsequent eighteen months dedicating a portion of time to evaluation of the program by its participants. In response to the collected feedback, the curriculum was revised and improved several times before publication of the current version.



EDUCATION PHILOSOPHY

To effectively use this curriculum as an educator, it is important to have an understanding of the basic philosophy and practice of Popular Education. The term 'Popular Education' comes from Latin America, where the word "popular" refers to "the people" - and, more specifically, the poor, working class, and/or landless. "Educação Popular" is "education of and by the people." There are forms of popular or "folk" education in cultures throughout the world. The term Popular Education is used to broadly refer to these styles and instances in the Americas because the

word was brought to prominence by Paulo Freire. The following is a way that a US-based group describes the concept:

“Popular Education is a learning process which:

- **Is inclusive and accessible to people with a variety of education levels;**
- **Addresses the issues people face in their communities;**
- **Moves people toward a place of action;**
- **Develops new grassroots leadership.**
- **Is based on the lived experience of those participating in the learning;**
- **Incorporates non-traditional methods of learning – such as poetry, music or visual arts.”**

[definition by Project South]

This education model starkly contrasts with most “conventional” forms of education, which are largely models in which the educator is the only “expert” in the room with the responsibility of imparting knowledge to the “ignorant” students. This model values memorization of information, retention, and repetition more than intellectual engagement, critical thinking, and the generation of new ideas.

Honoring the contributions and participation of every individual is inherent both in Popular Education and cooperation. Cooperatives are built on the principle that we each always bring something to the table and, as a result, deserve a voice in decision-making. In many ways, Popular Education is the embodiment of the cooperative principles and values in an educational model.

PRACTICING POPULAR EDUCATION

Putting philosophy into practice can be challenging. The following are some tips and tactics to help ensure an open and democratic education exchange in your trainings:

BEFORE THE WORKSHOP:

- **Learn as much as you can about the participants.** What do they care about? What are their lives like? How can you connect the topics of the workshops to issues that matter to them?
- **Reflect on Accessibility.** In thinking about your participants - their identities and experiences - there are several adaptations you can make to the content of your training, its timing and location, use of

visuals or audio, etc. *Check out the Accessibility Checklist in the Appendix for more specifics.*

AS THEY ARRIVE:

- **Be sure to welcome and acclimate folks as they arrive.** This explicit and personal welcome is a meaningful initial step in creating a comfortable and open culture of communication.
- Participants may continue to arrive during the first 10 - 15 minutes of the workshop. **Welcome and acclimate these folks, too**, but do so in a way that minimally impacts the “flow” of the workshop and conversation (e.g. getting them settled and sharing you’ll check in with them individually about anything they missed, if need be).

AS YOU BEGIN:

- Refer to “Welcome & Introduction” for tips on how to begin new workshops, lead introductions, and **set a conversational tone conducive to peer-learning.**
- **Continually frame and orient to time, objectives, and/or activities.** This helps people stay focused, appropriate energy, and plan for their needs (e.g. bathroom, phone call), etc. *That said, just because you will use these frames to orient people in the learning process, don’t get hemmed in by them.* You change course to pursue deeper learning, and use these same tools to reorient to the new path.

WHEN LEADING MOVEMENT ACTIVITIES:

- **Be aware of different abilities.** Since some activities involve standing and movement, which may not be comfortable or possible for some, assure participants that they can remain in one place or provide another option.
- When giving instructions for activities with movement, **explicitly mention how the group should engage** with both seated/immobile and mobile folks.

WHEN PRESENTING INFORMATION:

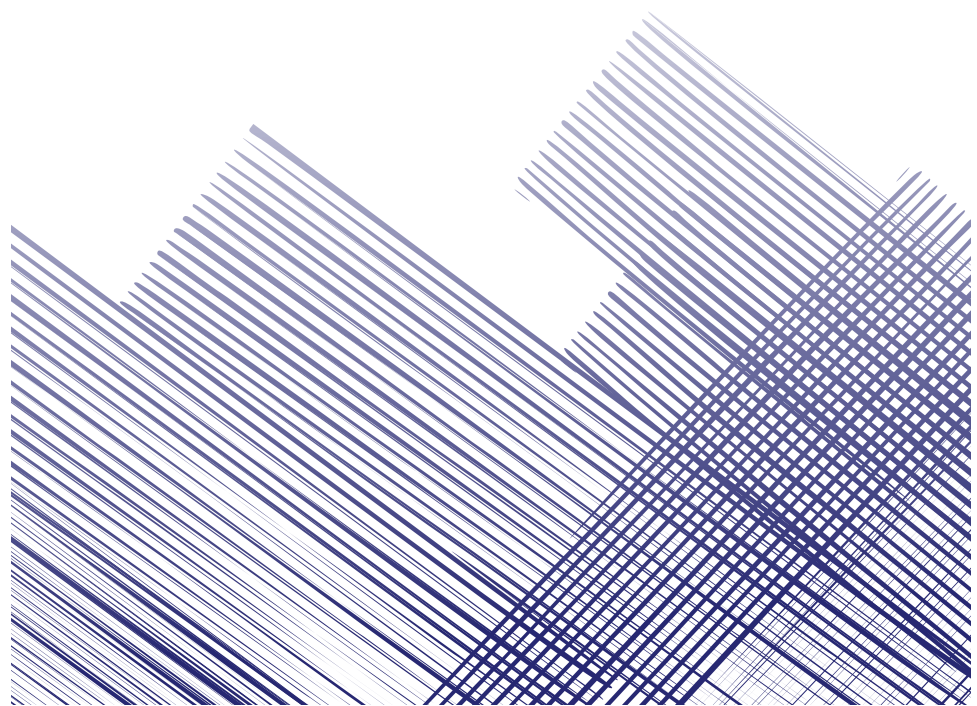
- For sections of the curriculum that utilize a presentation format, it is important to **frequently ask the group for their reflections or questions.**
 - » The central reason for interspersing questions is to allow you to build on the existing knowledge and expertise in the room.
 - » When you think attention is drifting, something seems to need clarification, or you feel like you’ve been talking for a bit too long - questions can be just what you need.

- **Don't hesitate to check-in about energy and attention very explicitly** - the group will know if it needs to take a break.
- **Ask permission before ending a conversational exchange.** Sharing control in this way, facilitates a shared conversation between the educator and participants.

AT THE END:

- **Ask participants for feedback** at the end of each session. Adjust your next facilitation to respond to their feedback, which will both reassure them of the value of their evaluations, as well as expand and strengthen your facilitation skills.

In summary, much of popular education philosophy and practices focus on ensuring the content and format is accessible to learning styles, physical capacities, and identities. *Refer to the Accessibility Checklist in the Appendix* for related tips focusing on even more practices to employ to build a more trusting, brave, and comfortable space for all participants.



USING THE CURRICULUM



OVERVIEW

This curriculum seeks to empower us to “collect ourselves” through the educational tools and enthusiasm needed to pursue cooperative entrepreneurship. The workshops within the curriculum are not exhaustive in terms of the technical aspects of business development, however a lot of that information is accessible on the internet or via in-person resources (e.g. your county’s small business development office). Relatedly, don’t overcomplicate things or doubt your own abilities. People have started cooperatives throughout history without the support of “experts,” though experts can certainly be a great support and are sometimes totally necessary. All that said, this resource is a source of foundational information and empowerment to get a group sufficiently inspired and on the path of cooperative entrepreneurship.

SPACE & SUPPLIES

All of the workshops in this curriculum can be led almost anywhere your group is comfortable. None of the activities depend on internet access or audio-visual equipment. An ideal training space would have at least the following bare necessities: table, chairs, walls, and accessible room/ bathroom (i.e. ADA compliant). ***Check out the Accessibility Checklist in the Appendix for more information on suitable physical spaces and set-ups.***

A list of the supplies (e.g. markers, paper), related handouts and posters, and anything else needed for each workshop is included at the front end of each section in the curriculum. The following is a full list of the recommended facilitation kit for Collecting Ourselves which support your use of the curriculum:

- ✓ **CHART PAPER:** The kind of chart paper with an adhesive strip that allows you to place each sheet directly onto a surface is ideal but can be expensive. Poster putty or painters tape with non-adhesive chart paper works just fine and is a less expensive option.
- ✓ **CHART MARKERS:** There is a special kind of marker specifically for chart paper that makes writing visibly and legibly for a room of folks much easier. Sharpie brand chart markers and Mr. Sketch

markers are both great options. Steer clear of permanent (they can stain walls), as well as thin or chisel tip markers (writing is often not visible from faraway).

- ✓ **REGULAR MARKERS:** Participants will have several chances to take collective notes and/or draw pictures; regular markers have finer points and are better for these purposes (they're less expensive than chart markers, too).
- ✓ **PENS & PENCILS:** Even though you should advise participants to bring their own paper and pen for notes, having extra available is important as some folks will forget or may not be able to obtain them for the training.
- ✓ **POST-ITS:** Post-its are ideal for brief journaling activities, as participants can stick them on the wall and see what their peers had to say on the topic. Multiple colors can come in handy when trying to group different responses, track progress, or just make the room more cheerful.
- ✓ **POSTER PUTTY OR PAINTERS TAPE:** This comes in handy for a variety of uses (even if you have self-adhesive chart paper). You'd be surprised how many times you'll use the stuff (e.g. when post-its don't stick to some odd surface - like stucco!).
- ✓ **DICE:** You will need, at a minimum, one ten-sided die for the role playing activities in the latter half of the curriculum. It is ideal to have at least two ten-sided dice or a set of Percentile Dice (ask at any game store for these) per five people.
- ✓ **PRINTED OR COPIED MATERIALS:** There are several handouts and worksheets in the Appendix that you will need to have copies of for each workshop. You may also find other relevant articles or resources to share, as well.
- ✓ **SNACKS, CANDY, REFRESHMENTS:** Depending on the length of a session, providing food and drink will help participants remain energized and focused. At a bare minimum, a chocolate bar or apple slices to get participants through the latter half of a training is important. Access to drinking water is ideal - if you can get hot water for coffee and tea, that's even better!
- ✓ **DECORATIONS, TOYS, & REFERENCE MATERIALS:** Little things to visually liven up the space can set a good tone for the training. Little toys or trinkets can be helpful to participants who appreciate being able to 'busy' their hands while listening or conversing. Reference

materials (e.g. cooperative development primers) give folks something to look at during breaks or lulls in conversation.

- ✓ **SIGN-IN SHEETS:** Having participants write down their names and emails at the front end of the session gathers the information needed to send out follow-up materials or to communicate with participants about subsequent trainings.
- ✓ **MISC:** Scrap paper, erasers, tape, stapler, rocks to hold down papers if outside, etc.

If you give trainings often, putting together a basket containing your “facilitation kit” items can cut down on your prep time for workshops.

ADAPTATIONS

See “Licensing” for guidelines relating to creating and distributing adaptations.

“Collecting Ourselves” can be arranged in a variety of ways to meet the needs of a given group of participants. One size does not fit all, so aspects of the curriculum are modular and modifiable so as to support an educator in customizing the curriculum to suit different audiences, group sizes, and special interests. The curriculum is modifiable in service to its commitment to **“meeting people where they are at”** by:

- » **Making the content relevant to trainees**
- » **Making the format and training method accessible**

AUDIENCE

Specializing and adapting the curriculum is sometimes going to be necessary in order for the content to be relevant to your participants. Participants will benefit most if they “see themselves” - lifestyles, work, aspirations, identities, etc. - in the stories and contexts presented. Specific adaptation suggestions are included within individual sections of the curriculum. More generally, any activity using a fictional scenario, story, or case study presents a prime opportunity to personalize the content so it involves contexts and communities that are familiar and relateable to participants.

GROUP SIZE

In terms of size, the ‘sweet spot’ for these trainings has proven to be between ten and twenty for one educator and twenty to thirty participants for two educators. To experience success with a smaller or larger group, expect to do some tweaking. Additionally, be aware that there is a point at which a group becomes too small or too big for you to be effective. As a trainer, understanding

how you are most effective and what your boundaries are (e.g. how many people you can train at once, how much time you need to meet a given objective) is very important.

LARGE GROUPS

- As a great deal of dialogue and small group conversation can support the learning process, it is important for trainers to be mobile in the room and available to support small groups and paired conversations, as needed. Having a large participant to trainer ratio makes this support difficult or impossible, and can result in participants becoming distracted or disengaged during the independent dialogue time.
- Regardless of the number of trainers, as groups become larger, it becomes necessary to break into smaller groups for most of the curricular activities. If the group is larger than twenty and you have the luxury of two trainers, split participants into two groups unless otherwise indicated in the curriculum.

SMALL GROUPS:

- Adapting the curriculum to a more intimate training context with ten or fewer participants can be difficult - one option is to walk through most of the activities in the program as a single small group.
- With small groups, refrain from following the questions of the participants too much - i.e. beginning to advise on a problem or issue posed by a single participant rather than moving through the curriculum with everyone. While this could be a valuable exchange for them, it may not be useful to other participants (i.e. don't let a training become a consultation).

AGENDA

There are many different ways this curriculum could be organized to suit different timelines or to prioritize specific learning objectives. Each section can be used as an independent workshop. When beginning any training, always include some welcoming and warm-up activity that gets the group of participants introduced and more comfortable with each other and with you, as the educator. A good practice is to use an abbreviated version of the activities detailed in "Beginning the Work: Setting the Table." A few example abbreviations to those activities are as follows:

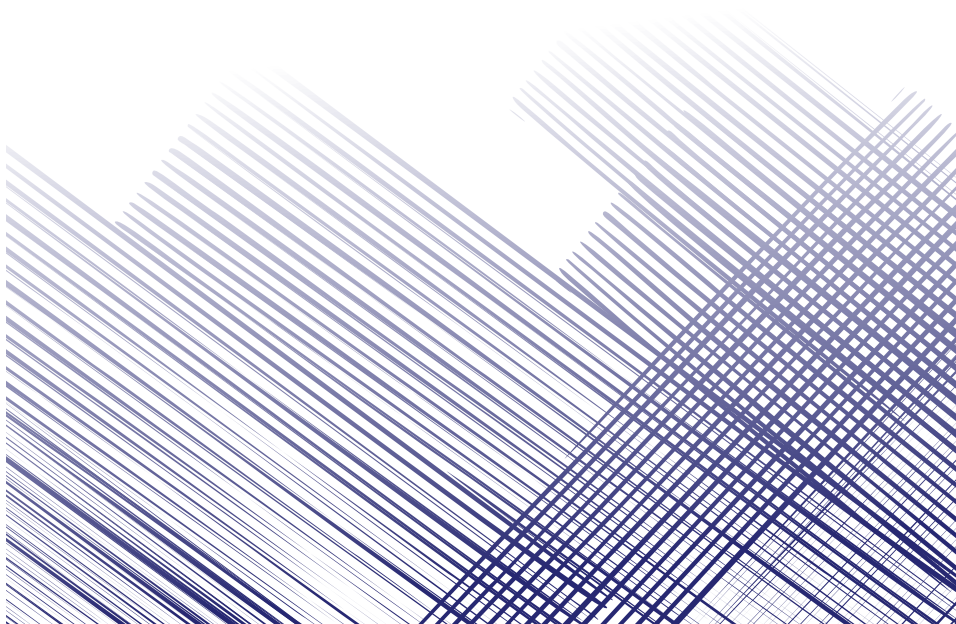
- Make the facilitator and participant introductions shorter - just stick to name, identity, and a simple prompt (e.g. "How did you get to the training today?" "One word that describes why you came to the training today.").
- If your group already knows each other and/or meets regularly, you may find a simple "check-in" go-around (e.g. Share name + ask "How Ya

Doing?") is sufficient to ready the group for the workshop.

- Ensure you don't get bogged down by agenda discussions, if the total session time is brief. You may use your discretion to choose to not open up the agenda for amendments.
- Select a mixer activity that can be completed in five to ten minutes.

When scheduling multiple, cumulative sessions, refer to the sample agendas provided in the Appendix to guide you in your schedule setting process. The included sample agendas are for the following kinds of schedules:

- ✓ **SEASONAL WORKSHOPS:** This format was used throughout the Upper Midwest by TCI in 2014-2015. It consists of an introductory workshop ideal for a summer evening (three hours) and a full day (eight hours) intensive winter session that ultimately covers all the material. This format is structured to accommodate seasonal agricultural work, given the importance of agriculture to much of the TCI program's rural audience.
- ✓ **SEMESTER CLASS, BOOK CLUB, STUDY GROUP:** This schedule format fits the curriculum breakdown of individual sessions from 90-120 minutes. It is useful for any group that meets regularly for relatively short periods of time.
- ✓ **RETREAT, ACADEMY:** This schedule format is ideal for intensive work in a retreat-like setting or focused multi-day gathering (e.g. Academy, Camp). The content is divided into three hour sessions. The curriculum could be completed in two to four days; fewer days require scheduling some workshops in the evening hours.



COLLECTING OURSELVES

A COOPERATIVE ENTREPRENEURSHIP CURRICULUM

SUMMARY OF WORKSHOP OBJECTIVES



BEGINNING THE WORK

- Acquaint participants with one another, the space, and the plan for the session or program
- Build trust in the group; set a positive and participatory tone for the training
- Build awareness of how the identities and experiences each participant brings into the room carries different amounts and kinds of power, a fact that will need to be managed within the training and within the cooperative entrepreneurship process

COOPERATION 101

- Provide an understanding of the Cooperative Identity
- Provide an understanding of how cooperatives work in comparison to other market-oriented models of organization
- Introduce the concept of the Profit Paradigm and encourage reflection on how it operates in our personal lives
- Explore how cooperatives differ from each other

COOPS AS TOOLS

- Build skills for assessing needs in a community context
- Build skills for identifying when a cooperative is and isn't an appropriate solution to meet needs

USING COOPS

- Provide an opportunity for participants to actively apply both their needs assessment skills and cooperative solution testing skills
- Provide an opportunity for participants to gain group process experience by working in peer groups with the goal of reaching a point of agreement and completing a shared task
- Provide an opportunity for participants to be applying their knowledge and new skills to determine if and how a cooperative solution could be relevant to their own life or community

DEMYSTIFYING DEVELOPMENT

- Explore and define “development” and “entrepreneurship,” as well as how those concepts are different in a cooperative context”
- Provide a basic overview of the cooperative development process using the “Cooperative Continuum”

WHAT’S YOUR PROCESS?

- Introduce the concepts of “group work” and “group process”
- Explore how group process takes place even when we aren’t fully aware
- Explore and make explicit how we build and lose trust in interpersonal relationships

ORGANIZING YOUR PEOPLE

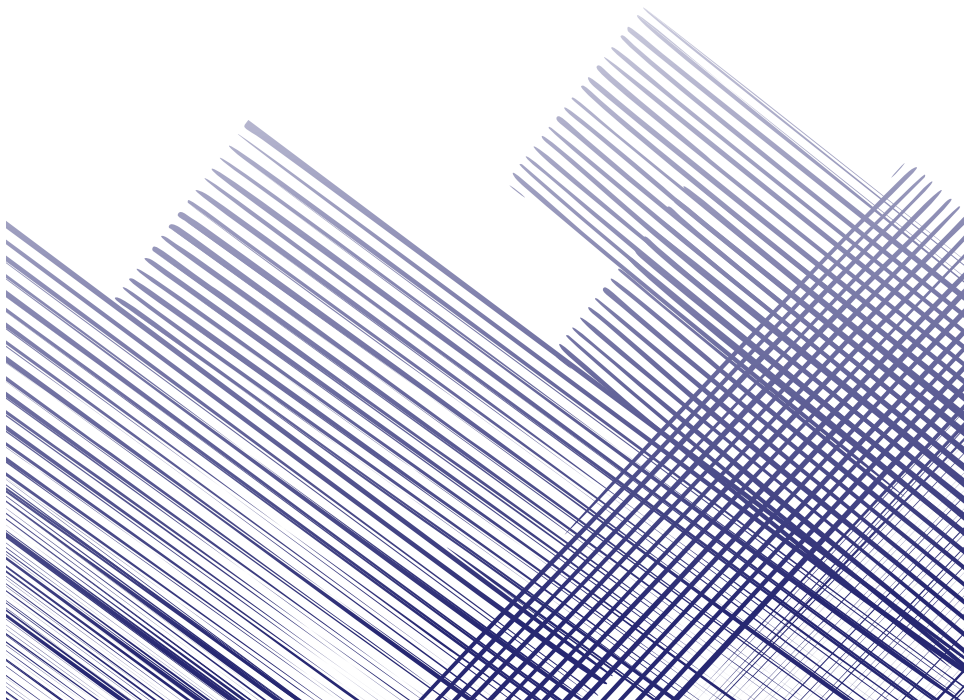
- Provide an opportunity to experience democratic process and cooperation by setting up a Steering Committee
- Provide an opportunity for peer-to-peer learning and decision-making

WHAT’S THE PLAN?

- Provide an opportunity for peer-to-peer learning and decision-making
- Provide an opportunity to experience the first steps in moving from ideation to a written articulation and action plan of the initial vision
- Introduce the components of a Business Plan

BRINGING IT ALL TOGETHER

- Revisit and discuss completed learning to identify and attempt to fill in any gaps
- Provide a forum for making concluding comments or questions
- Affirm the groups contributions and efforts
- Provide opportunities for continued engagement



BEGINNING THE WORK



OBJECTIVES

- Acquaint participants with one another, the space, and the plan for the session or program
- Build trust in the group; set a positive and participatory tone for the training
 - By introducing yourself, you build trust; by inviting input for an agenda (how the group will spend its time together), you create a culture of agreement and cooperation
- Build awareness of how the identities and experiences each participant brings into the room carries different amounts and kinds of power, a fact that will need to be managed within the training and within the cooperative entrepreneurship process.



TIME

- **10-15 minutes:** For a brief check-in (e.g. a familiar group is convening, workshop is a brief one-off training), focus on very simple introductions (e.g. Name, Identity) and a mixer activity to get the group talking.
- **90 minutes:** If able to dedicate more time, use more in-depth introductions and multiple warm up activities alongside more fully exploring the agenda. This kind of introductory session will better prepare a group for a series of trainings over the next days or weeks.



PREPARATION

SUPPLIES

- **Sign-in Sheet & Pen:** Make this available for participants to fill-in as they enter the room. Since folks will sometimes walk past or may hesitate to provide their information if they're not sure what it is for, explain what you will use their contact information for and pass it around once after the session begins.

POSTERS

- **Agenda**
- **Introduction "How To"**
- **Objectives**

ADAPTATIONS

- **Size:** If the group is larger than 20, participant introductions are best accomplished by breaking into two to three smaller groups. This allows folks to take more time with their introductions – to 'feel heard' and not rushed. This can also shorten the total time dedicated to introductions.
- **Note:** Whatever the group size, you will likely benefit from giving participants time guidelines for check-ins – it allows you to closely estimate the time needed according to the number of participants, and keeps you from asking folks to stop talking as they are making themselves vulnerable in the group for the first time (e.g. 3 minutes/person).
- **Audience:** You may want to create your own list of power and identity questions in "What's Your Analysis?" to demonstrate unique power dynamics among the group.

SETTING THE TABLE

This initial section covers how to manage the gathering of participants in the room, addresses logistical issues, introduces the educator, and reviews the agenda for the training. The goal is to set both the “table” and “tone.”

1. **SET TONE:** As participants arrive, set a welcoming and accessible tone for the workshop by doing the following:
 - A. **GREET EVERYONE:** Orient folks as they gather in the space by inviting them to find a spot, indicate the location of any refreshments, and/or offer other instructions that could help them acclimate.
 - B. **TIME WARNINGS:** A few minutes ahead, remind folks of the start time to allow them to get settled and close out other conversations before you begin addressing the group.
 - C. **HOUSEKEEPING:** Once everyone is assembled, welcome them to the training and “conduct housekeeping” - this is a key accessibility moment for you to share the things that will empower and equip people to participate. For example - indicate where the nearest bathrooms and drinking water are located. Encourage people to stand, sit, or take breaks, as needed, etc. *Refer to the Accessibility Checklist in the Appendix for more information.*
2. **INTRODUCE YOURSELF:** Sharing more information about who you are and why you are facilitating the training is an important first step to build trust and create a culture of openness. Your introduction will provide a model for participants, and will also allow them time for preparing their own introductions. Use the following items as a guide for your introduction –
 - ♦ **NAME:** Your full name and/or what you would like to be called during the training. *e.g. “Alice Allium, you can all me Alice!”*
 - ♦ **HOME:** Where are you from? Where do you live? *e.g. I grew up in the Midwest – have lived in four Midwestern states, and currently live on the Southside of Minneapolis.*
 - ♦ **IDENTITY:** Share anything that you feel is important to reveal about who you are (not just demographic info!) - keeping in mind the importance of this first connection with the participants. This is a time to counter any assumptions or misinterpretations folks might have about you and to model identity openness to others.
 - ♦ Specifically, even if most people correctly assume the pronouns you use, it is helpful to model sharing pronouns - e.g. she/her.

The “**Identity**” piece of the introduction is essential to the facilitator introduction and to the success of the session. By sharing your identity, you invite openness to participants who may be shy or uncertain about articulating personal information that is important for them to share to fully and comfortably participate in the training.

- ♦ **NEEDS:** Share anything you might need in order to fully participate in the training - accessibility needs, scheduling issues, etc. - e.g. "I am more able to focus if I can stand during parts of the training." "I have to leave early."
- ♦ **MOTIVATION & GOALS:** Why are you here? What do you want to accomplish by being here? Make it personal! - e.g. "I started a cooperative with my friends without the help of any experts - it was an empowering and transformative experience that I hope more people can experience."

Avoid Popcorn. In order to both keep the introductions moving quickly and not create a rushed atmosphere, opt for introductions to happen round-robin style or via another established turn-taking order instead of "popcorn-style" (i.e. spontaneous introductions). Eliciting spontaneous responses, especially at the beginning of a workshop, often takes longer and has the potential to create silences which slow down and complicate conversational momentum. This can quickly change a comfortable atmosphere into an awkward one.

Be Confident. In your role as facilitator, make sure to steward the agenda, as it is your responsibility to make sure the content is effectively explored in a given timeframe. If someone suggests a change that you don't consider helpful or relevant, briefly explain your perspective and thinking attempt to work towards a shared understanding of training priorities. If you do choose to turn down a suggestion, get the group's general agreement for you to do so. A possible middle path is to add a suggested change or addition to the end.

3. INTRODUCE PARTICIPANTS: Ask for someone to begin a *go-around* of introductions using the "Name, Home, Identity, Needs, Motivation/Goals" format. This is the first chance for folks to begin getting comfortable addressing the larger group and talking with one another, so it is important to dedicate sufficient time to this task to ensure folks don't feel rushed and begin to contribute to the group dynamic.

- WRITE DOWN NAMES:** As participants introduce themselves, write down each person's name and one or two things they shared that will help you to recall them. Address folks by name, whenever possible, throughout the training.
- THANKS:** Closing out the introductions by sharing your appreciation for everyone's attendance and participation is a simple way to strengthen the peer-exchange dynamic.

4. REVIEW OBJECTIVES & AGENDA: Next, review the session objectives and agenda so all participants will know the suggested time frame and aim. Be sure to provide an opportunity for participants to ask questions about content or logistics, as well as suggest changes to the agenda.

- SUMMARIZE:** As you proceed through each agenda item, summarize its content and method (e.g. presentation, small group work, role play) in one to two sentences.
- CHECK FOR UNDERSTANDING:** Ask participants if they need clarification on any of the agenda items.
- MAKE CHANGES:** Ask if anyone would like to add to or change the agenda, as written. Keep in mind your aims and responsibilities as steward of the agenda. Post the agenda and then use markers to record any changes. Be open to additional modifications as you move through the training, as the flow of discussion and timing may necessitate them.

WARMING UP THE GROUP

After laying out the framework and content for the time the group will spend together, get people talking! Since this form of training depends a great deal on participant input and participation, it is important to get folks actively engaged as soon as possible.

- 1. LEAD A WARM-UP MIXER:** This activity is intended to continue to reinforce a positive conversational tone. If most participants are physically able, incorporating movement into the activity is a great option, as it keeps participants from hunkering down in their seats in “classroom mode.” There are loads of mixer activities available online or in facilitation books - you can also create your own. Choose a few that you especially enjoy and use them interchangeably. You can easily modify this basic mixer by changing the prompt(s).

A. CONVERSATION CLOCK

- I. Provide Directions:** Instruct the group to form the “clock” - having any less mobile folks sit in the outer circle, as the inner circle will be the one to rotate.
- II. Frame:** Explain that the group will be responding to one or more prompts and sharing their answer with the person across from them in thirty seconds or less. Share that you will keep time, announce when the inner circle needs to rotate, and if/when the prompt changes. Share that if a person feels uncomfortable responding, they can skip a prompt.
- III. Prompt:** Use some of the following or create your own prompts that can be answerable in no more than a few sentences and should be one that you think everyone would feel comfortable answering in front of all those present. Questions can range from the mundane to the profound.
 - » What do you usually do on Tuesdays?
 - » What motivates you?
 - » What do you know about cooperation?
 - » What did you want to be “when you grew up?”
- IV. Keep Time:** Time each thirty second segment and warn people when there are five seconds left. Depending on your

Be Aware of Different Abilities. A mixer will likely involve standing and movement, which - while valuable for those who are able - may be too physically demanding, uncomfortable, or impossible for some. Assure participants they can remain in one place. Remind participants of the importance to connect with everyone both mobile and less mobile.

scheduling needs, it may be necessary to end the activity before the clock has rotated fully.

V. Wrapping It Up: When time has elapsed or after the clock has fully rotated, reconvene the group and ask a few questions:

- » Did you learn anything surprising from the mixer?
- » What did you notice about who is here, based on the responses you heard?
- » Were there any themes or patterns in responses?
- » Were any assumptions made in some of the questions asked?

2. CHECK “TEMPERATURE” OF GROUP: If the group seems “warm,” close out the activity and move into the next session. If you don’t think the group is “warm,” ask a few questions of the group or plan another round of the mixer activity or use a different warm-up activity or prompt. You can also ask for group suggestions for a fun, short activity that they enjoy using in group spaces. Always keep in mind that the differences in abilities and your time management responsibilities.

Places to find other Mixers & Facilitation Games:

- **Seeds for Change**
seedsforchange.org.uk/resources
- **NASCO**
nasco.coop/resources/facilitation-games
- **Volunteer Power**
volunteerpower.com/resources/icebreaker.asp
- **Gamestorming (book)**
gamestorming.org

GETTING IN LINE

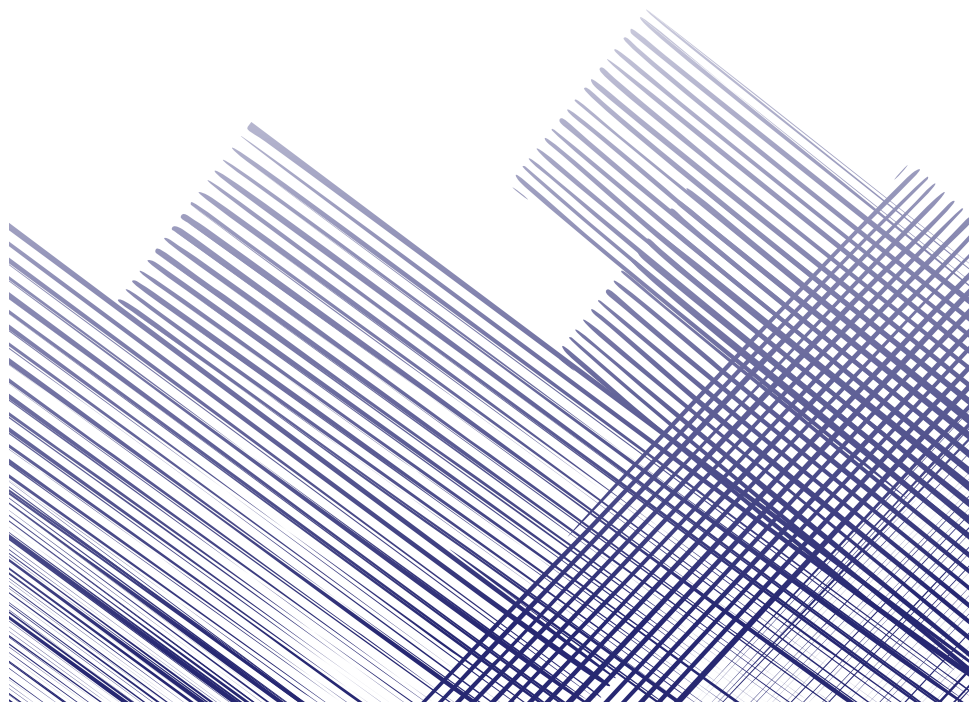
Via a movement activity, the group will explore how power is distributed among participants based on identity and background. Having an analysis of how power is distributed inequitably in society is foundational for working in groups to build democratic and equitable enterprises.

- 1. FRAME:** Share that the group will play a movement game to conceptualize how power is distributed among people of different experiences and identities. It is imperative that we understand how power is structured in society so we can manage it in the groups that we create.
- 2. FORM A LINE:** Guide participants in forming a straight line, side-by-side, facing the same way, in the middle of the space.
- 3. PROVIDE INSTRUCTIONS:** Share how you will read a list of characteristics alongside an instruction to move either forward or backward a number of feet. Participants are to move (however they are able) as directed, if the characteristics named lines up with the person they are role playing.
 - » The activity can also be played using blocks or toy cars moved on a table or the ground, if movement is difficult.
- 4. READ IDENTITY DESCRIPTIONS ALOUD:** Read each of the following, pausing in between and asking people to look around and assess their orientation to others throughout the activity.
 - If you make less than 40k a year, move one foot backward.
 - If you make more than 40k a year, move one foot forward.
 - If you identify as a woman female, move one foot backward.
 - If you identify as trans* or gender non-conforming, move one foot backward.
 - If you are white, move one foot forward.
 - If you are a Person of Color, move one foot backward.
 - If you are employed, move one foot forward.
 - If you are looking for work, move one foot backward.
 - If you are under 21 years old or over 60, move one foot backward.

Creating a Consenting Space. While the activity works best with as many people participating as possible, it is important your training spaces are “consenting.” In this activity, that means allowing for individuals to opt out of all or part of the activity. Discussing why folks might opt in or out could be a good conversation, if the group is brave and equipped enough.

5. ASK: Any observations or reflections on the activity or where you ended up in relation to other people in your group?

- 6. REFRAME THE ACTIVITY:** Share that these differences in power are always at play in our conversations - even when we are working together towards a shared goal (i.e. in democratic institutions like cooperatives). Part of our work in building cooperatives together is intended to equitably distribute power, but that will only happen if we do the work with awareness and intention.



COOPERATION 101



OBJECTIVES

- Provide an understanding of the Cooperative Identity
 - how the cooperative model is defined by a set of values and principles
 - how cooperative structures have evolved over time into a specific, globally-recognized model of organization
- Provide an understanding of how cooperatives work in comparison to other market-oriented models of organization
- Introduce the concept of the Profit Paradigm and encourage reflection on how it operates in our personal lives
- Explore how cooperatives differ from each other



TIME

- **90 minutes:** Spending 15 minutes on “Coops In Theory,” 60 minutes on “Coops In Practice,” and 30 minutes on “The Coop Difference” provides you enough time to provide an overview of the content, but does not allow for as much exploration or discussion.
- **180 minutes:** Using up to an hour for each subsection allows for more time to ask and answer questions, to complete activities in pairs or small groups and processing learnings in the larger group, as well as get into greater detail about a topic - specifically, spending an hour on “Coops In Theory” or exploring each Cooperative Principle individually.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Scrap Paper
- Pens & Pencils
- Chart Markers
- Regular Markers
- Chart Paper

POSTERS

- Cooperative Identity
- Ownership, Control, & Benefit Matrix
- Profit Paradigm Definitions

ADAPTATIONS

- **Time:** If you are short on time, you can present the Cooperative Identity to the group lecture-style, instead of facilitating pair conversations in the “Coops In Theory” section. In doing this, you don’t need to describe each Value and Principle individually, but, instead, explore one or two in greater detail. Make some broader observations about how they work together. Be sure to ask participants if they need clarification or have specific questions at a few points during your presentation.

COOPS IN THEORY

This section is an overview of how cooperatives have become defined and how they are understood “in theory.” The goal is to support participants in gaining a shared language for discussing cooperation. The discussion is not intended to dig into the complexities or details of the Cooperative Identity, rather to present it in a broad market and movement context.

1. PRESENT HISTORY OF THE COOPERATIVE MODEL: In your own words, share the following information with the group -

For more information on Elinor Ostrom and her related research, you and the training participants can visit ostromworkshop.indiana.edu. Post this url somewhere in the room so folks can copy it down for later reference.

- **It has been proven** - most notably by late US researcher Elinor Ostrom - **that humans have the propensity to cooperate rather than compete.**
- **Collective benefit and ownership structures are a centuries old means of social and economic organization.**
 - Over time, our social, political, and economic methods of organizing ourselves have become more formalized through the creation of systems to regulate our governance and commerce.
 - In response to these societal developments, collective activity evolved into a specific business model that is recognizable by people and governments all over the world.
 - While some folks within the cooperative community will trace the origin of the cooperative movement back to a group of artisans in 19th century, the Rochdale Equitable Society of Pioneers, this is untrue. Humans have been cooperating for much longer!
- While the cooperative model is recognizable around the globe, **it is not treated the same around the world by governments and regulators** - there is no single way cooperatives are legally categorized, nor is there a single way that cooperatives are treated for the purposes of taxation.
 - As of 2016, only five of fifty US states have a formal legal status that explicitly speaks to or uniquely facilitates worker-owned cooperatives.
- **There are a number of different ways people refer to cooperatives** - mutuals, fraternal, collectives, and social clubs. They all have cooperative identities, but perform the work of cooperation with a different label.
- One thing all cooperatives have in common is that **they are owned and controlled by their members.**
- Cooperatives are not defined by their corporate status, tax

treatment, or name - **cooperatives are defined by a set of Principles and Values, which makes them very distinct from other forms of business.**

- The set of 10 Values and 7 Principles, alongside a brief definition, are known together as **the “Cooperative Identity.”**
- **The Cooperative Identity we have today was derived from the set of principles developed by the Rochdale Equitable Society of Pioneers** in 1844, which was a group that cooperated whose history did not get lost, forgotten, or repressed - as did that of innumerable communities.

2. SHARE THE COOPERATIVE IDENTITY POSTER &/OR HANDOUT: Direct participants’ attention to the written materials which delineate the defining statement alongside the 10 Values and 7 Principles of the Cooperative Identity.

A. READ OUTLOUD: Engage the group in reading through the principles and values outloud before discussing them.

2. FORM PAIRS: Ask participants to turn to the person closest to them to explore the Cooperative Identity together for a few minutes. Prompt them to -

- A. Ask each other about anything they may not understand or isn’t clear,
- B. Identify anything that jumps out at or surprises them, and
- C. Identify any aspects of it they particularly do or don’t like.

3. BRING GROUP BACK TO DISCUSS: Bring the large group back together and solicit feedback. To guide conversation, move through the above prompts until a discussion takes hold.

A. SCRIBE: Record responses, if desired, on a piece of chart paper.

4. PRESENT OBSERVATIONS: Once you sense that folks have reached a comfortable point of understanding, share the following information unless it was already covered in the discussion:

➤ The Cooperative Identity is **maintained by the International Cooperative Alliance**, or “ICA,” the cooperative movement’s global organization. The ICA has been around since 1895, which means it predates the United Nations. As a result, the ICA was one of the first three organizations to receive Consultative status¹ with the UN.

➤ The **Values are favored over the Principles** by many cooperative practitioners, as they are more restrictive - in a positive sense -

¹ en.wikipedia.org/wiki/Consultative_status

THE COOPERATIVE IDENTITY

STATEMENT: A cooperative is an autonomous association of persons united voluntarily to meet their common economic, social, and/or cultural needs and/or aspirations through a jointly-owned and democratically-controlled enterprise.

PRINCIPLES:

- 1) Voluntary & Open Membership,
- 2) Democratic Member Control,
- 3) Member Economic Participation,
- 4) Autonomy & Independence,
- 5) Education, Training, & Information,
- 6) Cooperation Among Cooperatives, &
- 7) Concern for Community

VALUES: Self-help, Self-responsibility, Democracy, Equality, Equity, Solidarity, Honesty, Openness, Social-responsibility, and Caring for Others.

than the Principles (e.g. the clarity of “Honesty” vs. “Education, Training, & Information”).

- ⚡ **The Statement does not only speak to what most people might recognize as a “normal” business** that provides a good or service in exchange for money. Cooperative entities can be created to exchange different kinds of value – not just financial capital! There are many different kinds of economy that trade in different types of capital – e.g. social capital, human capital.

5. ASK: What coops have you or someone you know interacted with? Who are the members of those cooperatives? What needs are being met?

- A. SCRIBE:** Write down participant responses (on your own paper or on a viewable piece of chart paper) so you can remember and use them later to make connections between participant experience and the content. A prime opportunity to use these examples is during the upcoming “Cooperative Difference” section.

COOPS IN PRACTICE

This section explores how cooperatives operate in practice by examining how they work during the “day-to-day.” To contextualize cooperatives within the broader economy, cooperatives can be compared and contrasted with other forms of market-oriented models of organization, which people regularly encounter in their communities.

- 1. FRAME:** This activity seeks to answer - *“Who owns, controls, and benefits from the different models of organization most prevalent in our communities and economies?”*
- 2. SHARE MATRIX POSTER &/OR HANDOUT:** Direct participants’ attention to and explain the columns (For Profit, Non Profit, Cooperative) and row labels (Own, Control, Benefit) on the matrix.
- 3. EXPLAIN MATRIX ROWS:** Briefly, in a non-leading way, explain what is being referred to by “Own,” “Control,” and “Benefit.” For example:
 - Ownership = possession of entity
 - Control = ultimate decision-making power
 - Benefit = a gain, surplus, profit, positive return
- 4. ASK FOR BUSINESS EXAMPLES:** Have participants suggest examples of a business with which they are familiar for each included model. Record business names at the top of each column label of the matrix - e.g. “Wal-Mart” next to “For Profit.”
 - Encourage the group to select an investor-owned entity for the “For Profit” column, as it most clearly illustrates the distinction across the three models
 - If a participant “gets technical” about the different types of entities within these categories (e.g. Non Governmental Organization vs Non-Profits vs Not For Profits), be sure to affirm the nuance in those organizational types before restating the goal of the workshop and reason why the activity seeks to generalize the models.
 - If you are not familiar with one of the organizations suggested, you may want to encourage folks to suggest another one so you can comfortably lead the activity.
- 5. FORM PAIRS OR SMALL GROUPS:** Ask participants to split up into groups of five (or fewer) people or count off to assign group members.

6. **INSTRUCT GROUPS TO FILL IN SQUARES:** Direct participants to work through the matrix squares as a group - let them know that making guesses and leaving squares blank is okay.
7. **MONITOR ENGAGEMENT:** As the small groups are working, canvass the room and assess comprehension or address needs for clarification. Monitoring progress can save you time, as you may notice groups finish their work before the time you allotted has expired, so you can move to the next step sooner.
8. **BRING GROUPS BACK TOGETHER:** After the allotted time has passed or all groups seem to have finished their matrix, bring participants back to the larger group to fill in a collective matrix.
9. **FILL IN MATRIX AS A GROUP:** Using a cumulative reportback model of asking one group at a time what their answer is for the square until you get a correct answer, you can engage each group and keep the discussion moving.
 - Fill in the squares by focusing on one column at a time.
 - If someone is close, but not exactly correct, ask “can you tell me more about that?” Often with this activity, people know the correct answer but struggle with finding the exact language.
 - You will likely need to fill in some squares yourself and correct some assumptions.

Very few people know who “owns” a Non Profit organization – the State (i.e. the People and their Government) owns a Non Profit. Language frequently found in the governing documents of NonProfits refers to the organization “easing the burden of the State” through their work (which qualifies them to be tax-exempt).

10. **ASK:** Does anything jump out at you about the completed matrix? What patterns do you notice?

- A. **INDICATE PATTERNS & OBSERVATIONS:** As participants discuss patterns and important areas of difference, indicate them on the posted matrix by drawing arrows, lines, circles, adding new rows or columns, etc.
 - Support visual learners by using different colors to indicate patterns.
- B. **DRAW OUT SPECIFICS:** If the following points don't arise organically through discussion, draw them out by asking questions:
 - **OWN:** A typical For Profit is owned by a few people, Non Profit is owned by an abstraction of people (the “State”), & Cooperative or Mutual is owned by all the people that use it.
 - **CONTROL:** Board of Directors are typically used by each of these models to govern their work and make decisions. How Boards perpetuate themselves (e.g. add new Directors on the

Board) and how decision-making power is distributed are key distinguishing factors between Boards:

- » 1 share = 1 vote in For Profits vs. 1 member = 1 vote in Cooperatives and Mutuals
 - » Similarities between the amount of power held by Majority Shareholders in For Profits and that of Majority Donors in Non Profits
- **BENEFIT:** The proportionality of distributed benefits is different across the three organizational models -
- » Benefit is proportional to capital input in For Profit (investment), whereas benefit is proportional to use in Cooperatives and Mutuals

11. "NAME" THE PROFIT PARADIGM: In concert with the definitions below, explain that the "Profit Paradigm" is encompassed by the Non Profit and For Profit columns - indicate this visually on the collectively filled in matrix.

12. PRESENT "PARADIGM" DEFINITION: In order to explain the concept of the Profit Paradigm, present the following definition to explain that the majority of the way we organize ourselves in our economy is beholden to the set of philosophies and practices oriented to the concept of "profit."

- » **Paradigm (n.):** A set of assumptions, concepts, values, and practices that constitutes a way of viewing reality for the community that shares them.

13. PRESENT "PROFIT" & "SURPLUS" DEFINITIONS: In order to illustrate how the concept of "profit" is the foundation of our economic paradigm, present the definitions for "profit" and "surplus" - which are often considered to be synonymous, but incorrectly so.

- » **Profit (n.):** An advantageous gain or return.
- » **Surplus (n.):** An amount or a quantity in excess of what is needed.

14. DISCUSS: Move through the follow questions to discuss the definitions for Profit and Surplus. Sample responses to pull out are included as subpoints.

- What do you notice about the similarities or differences in these two definitions of words often considered synonymous?

Continued...

- Profit uses “advantageous” - a relative term, which is divisive (e.g. to have an advantage, you have to have more than another). Surplus focuses on need.
- | In what ways do you think that these concepts might ultimately have different influences on how we think about our economy?
- Considering profit as an indicator of success, rather than an excess of the means to meet a need, creates perverse incentives in the economy.

15. PROVIDE FRAMING FOR FURTHER DISCUSSION: Building off of the responses to the above questions, share the following points to frame a deeper discussion about the pervasiveness and limiting nature of the profit paradigm in our lives and imaginations.

- ◀ The profit paradigm encompasses the **vast majority of enterprises in the United States today.**
- ◀ **Language shaped by the Profit Paradigm is pervasive even in our cooperatives and mutuals -** Many people use terms like Profit when discussing cooperatives, even though cooperatives are created to meet needs not generate Profit. Those cooperatives that recognize the importance of language choice in informing our incentives and motives often choose to refer to the amount of money left in business accounts after all expenses are paid as Surplus rather than Profit.
- ◀ The pervasiveness of the profit paradigm and its concepts plays a role in shaping **both how we think about our current economy as well as how we imagine how our economy could act, look, and feel.**
- ◀ Perhaps most troublingly, **Profit Paradigm language and concepts have found their way into how we convey ourselves, our work, our relationships, and what we value in life.**
 - » For example, the word “capital” is used throughout our society and relationships to describe “units of value.” Social capital refers to the “wealth” of our social networks, human capital measures the knowledge and capacity we have for productivity, political capital is an assessment of power in an institution or system of relationships, etc. Many people have experienced a sense of “worthlessness” when they perceive themselves as being unproductive.

16. DISCUSS: Move through the following questions to explore together the impacts of the Profit Paradigm in our lives that you shared in the framing points. Some example responses to the prompts are included for context:

DESCRIBE: What are some ways that you have experienced or know of in which the language of the Profit Paradigm has been used to describe your self, relationships, or community?

REFLECT: Are those instances negative or positive? Any other observations about their use?

INTERPRET: Do you think that a profit-centric view of the economy limits our imagination for how to meet needs and achieve aspirations? Why or why not?

APPLY: How might you be able to impact your relationships or self perception through being more conscious of the role Profit Paradigm language and concepts play in how you view the world?

17. SHARE THE “COOP DIFFERENCE:” Explain that the term “cooperative difference,” as it is used within the cooperative movement, refers to the differences in motivations and strengths between cooperative entities and those within the profit paradigm.

THE COOP DIFFERENCE

This section explores the versatility of the cooperative model, how cooperatives differ from each other, as well as how cooperatives are categorized given their versatility and difference. The goal of presenting this information to participants is to make clear that cooperatives are relevant to most any need or endeavor, as they have existed in every sector and industry. The goal of this section is to showcase the great potential of the cooperative model so learners can begin to imagine the many ways a cooperative could be relevant to their lives.

1. **PROVIDE CONTEXT:** Briefly describe two real life cooperatives as examples. Ideally, you will build on the participants' experience and use two cooperatives generated by the group in the previous section. If you didn't do this activity or the group didn't know any, pick two cooperatives that are well known as businesses so folks will be able to dialogue around their characteristics (e.g. Land'O'Lakes).

2. **ASK:** How do these two cooperatives differ according to - a) who is involved, and b) what is created or provided?

- A. **RECORD:** As participants answer this question, record their responses on a piece of chart paper with two rows ("who," "what").

3. **ASK:** Can you think of any "whos" or "whats" that you don't think could be cooperatively organized?

4. **PRESENT:** After exploring what folks in the room already know and anticipate on the topic, contribute enough of the following content that was not brought up in conversation to sufficiently communicate the following -

- A. **WHAT = INDUSTRY**

- Members of the international **cooperative community determined that cooperatives have and can exist in all industries or "whats" (e.g. manufacturing, retail, food production, financial)**. The only exception that arose in this research and discussion process was the industry of "military defense."
- » This exception was questioned by people who used the example of community -owned and -managed indigenous groups who necessarily use military defense to protect and preserve their land and culture.

- **During the last century in the United States, most cooperatives were in the following industries: agricultural, rural utility, insurance, and retail.**

B. WHO = ROLE

- **Role(s) of a cooperative member-owner (e.g. worker, consumer, producer) offer an important way to categorize cooperatives** into sectors, as those entities with similar member-owner roles have similar priorities and needs.
- Most existing US cooperatives **only have one role type eligible for membership, though having more than one role - a multi-stakeholder cooperative - is possible and currently on the rise.**
- The decision of what stakeholder role(s) will be eligible for membership in a cooperative **depends on the founding purpose of the cooperative and how the founders of the cooperative prioritize and facilitate participation of all the cooperative's potential stakeholders.**

B. FLEXIBILITY

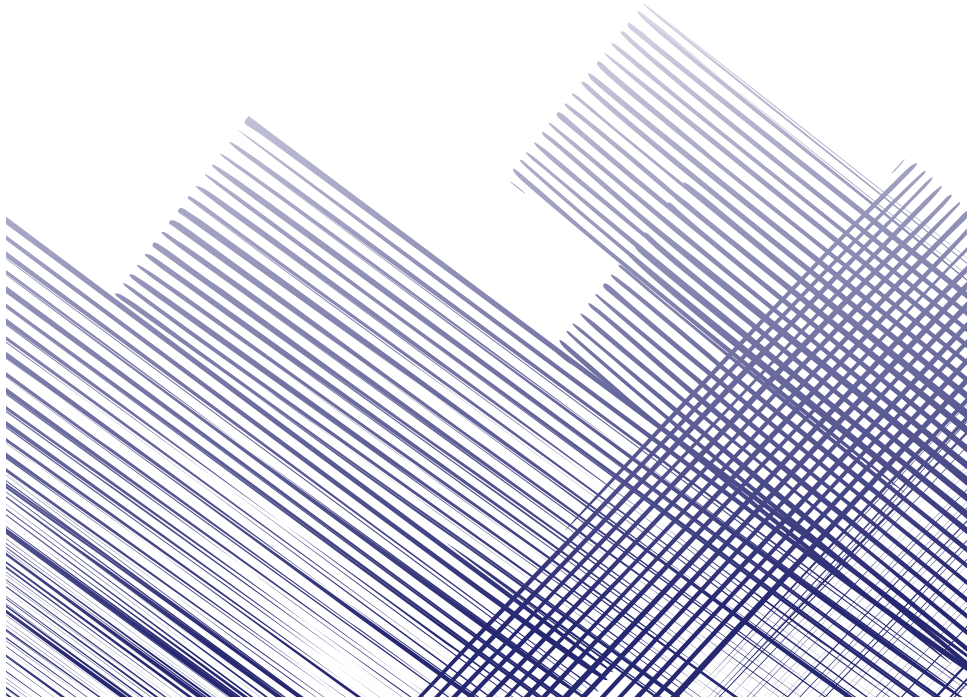
- **The Cooperative Identity is flexible** in key ways (e.g. equity structure, management practices) that allow it to meet many needs. Its flexibility is one of the reasons cooperatives **does not have a singular legal or tax status** throughout the US and the world.
- Recognizing the flexibility of the model helps to dispel two **myths about cooperatives:**
 - » **Cooperatives = Collectives** → the term “collective” is typically used in the US to refer to a business using a collective management structure (whether a cooperative or not). While cooperatives are all collectively owned by their members, *cooperatives can have any type of management structure*.
 - » **Cooperatives Can't Scale** → Due to assumptions about how cooperatives are managed and run, people often think that cooperatives can't grow large and still work. *Successful cooperatives come in all sizes* – of amount of assets, number of staff, geographies, etc.

4. ASK: How would you define a cooperative in one word, phrase, or picture?

- A. RECORD:** Write the group’s definitions on a piece of chart paper to create a wordcloud definition.
- B. CHECK UNDERSTANDING:** This question is intended to identify gaps in understanding and/or to encourage participants to name needs for clarification or desires for more information. Creating a shared definition will begin to form a shared language within the group that may be more understandable and less jargon-filled than the Cooperative Identity.

An Example of a Collective Definition of “Cooperative:”

Fully human business	Not-for-profit, Not-for-charity, For-Solidarity	Shared Ownership
Personally involved		Democratic
Peoples’ Business	Connected care	<3!



COOPS AS TOOLS



OBJECTIVES

- Build skills for assessing needs in a community context
- Build skills for identifying when a cooperative is and isn't an appropriate solution to meet needs



TIME

- **90-120 minutes:** This timing varies greatly by how many participants you have and how many stations you use during the "Cooperative Stories" activity. Dedicate any "extra" time, first, to padding the exploration part of the "Cooperative Stories" activity and, second, to the closing discussion.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in "Beginning the Work" and "Bringing It All Together," respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Chart Paper
- Sticky Putty
- Regular Markers
- Chart Markers

MATERIALS

- Cooperative Stories

POSTERS

- What, Who, Why, !!!



PREPARATION (continued)

ADAPTATIONS

- ◀ **Audience:** Choose cooperative stories for your group that present cooperatives as relatable. Be prepared to challenge assumptions or mythology and/or encourage very specific questions relevant to your audience.
 - For example, one to two case studies used during every Youth TCI training involved cooperatives developed and maintained by young people, to highlight that cooperative entrepreneurship is not inaccessible.

- ◀ **Group Size:** A good rule of thumb is to post no more than one cooperative story per two participants. Participants typically take five to ten minutes to review a single station, keep that in mind when determining the number of unique stations and the number of total stations. It is better to have participants revisit a station than to not get through all of them.
 - If you have a large group size, you can post multiples of a single station so there are not too many stations to get through and participants have enough space to converse comfortably.
 - If you have a group of five participants or less, discuss a few cooperative stories as a group instead of posting them around the room. Take notes on a shared piece of chart paper to post on the wall for display during the rest of the training.

COOPERATIVE STORIES

Some sample Cooperative Stories and prompts are included in the Appendix, alongside directions for how to create your own. A great resource for stories that could be adapted for this activity is *stories.coop*.

Tips to manage the activity effectively -

Be Aware of Different Abilities: *If some participants need to remain in place to be comfortable, arrange for someone who is comfortable and able to be mobile to bring station materials-one at a time- to seated folks.*

Participate: *During this session, the facilitator should circle the room and pop into conversations. The facilitator also needs to write their own questions/responses to the case studies and prompts.*

Prepare for Discussion: *At around halfway through the time, the facilitator should visit all the stations and jot down key themes and record provocative questions. These will be used to frame the subsequent discussion.*

Keep Time: *Give time updates every five to ten minutes so folks can get a notion of the pace they will need to keep to move through all stations before the activity ends. If you notice that time has almost expired and some folks haven't visited all the stations, suggest that they quickly skim all remaining stations during the remaining minutes of the activity*

During this activity, participants will read through stories about different cooperatives. Participants will reflect on and discuss the stories with one another as they practice identifying the needs present in a community, in order to understand “why” people start cooperatives. Some prompts are personal to lead participants towards beginning to examine their life, work, and potential for cooperative entrepreneurship.

- 1. PREPARE THE ROOM:** Create poster “stations” before the session begins by posting blank pieces of chart paper alongside a cooperative story or prompt on surfaces (e.g. walls, tabletops, windows). Be sure that stations are arranged far enough apart that conversations can be had comfortably at each station. If movement isn't possible for most participants or the space isn't conducive to movement, the station materials can be passed around between pairs or small groups.
- 2. FRAME:** Introduce the activity as a way to practice identifying needs or issues present in a community and to understand how those prompt a cooperative response. Participants will also have the chance to reflect on issues and needs they experience in their own lives and communities, as a first step to exploring how cooperative solutions could be relevant to them.
- 3. FORM PAIRS OR SMALL GROUPS:** Ask participants to split up into groups of three or fewer on their own, or count off participants to assign partners or group members more quickly.
- 4. PROVIDE INSTRUCTIONS:** Share that participants should engage with each station for a suggested period of time (depending on total time).
 - A. EXPLAIN PROMPTS:** There are a few key questions at the bottom of each case study; each prompt is a single question. While answering the questions is great, they don't need to be answered directly - they can serve as a springboard for further conversation.
 - B. INSTRUCT FEEDBACK:** Direct participants to use the blank paper to write down answers to questions in addition to any thoughts, or ideas generated by their reading of the cooperative story or prompt. Anything goes! Encourage folks to both write down things that came up through group dialogue, as well as their individual reflections (if different). Additionally, get folks replying to comments written up by previous folks.
- 3. BRING GROUP BACK TOGETHER:** After the allotted time has passed, bring participants back to the larger group to ready them for discussion in the next session.

UNDERSTANDING THE WHY

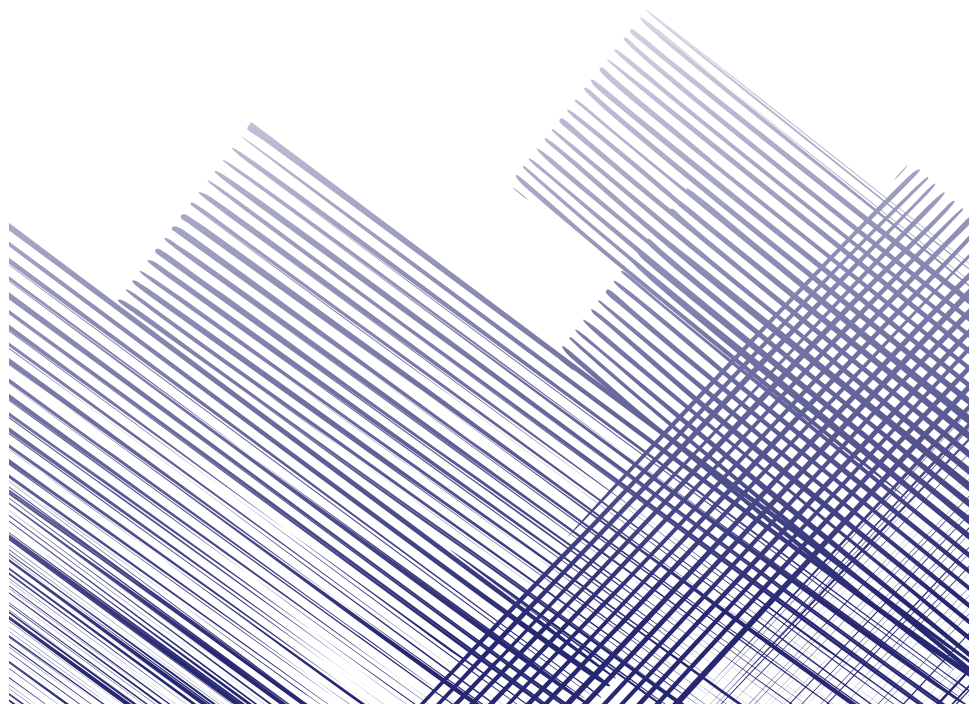
The intent of this concluding conversation is to reflect on what was learned through the cooperative stories, and to specifically explore “why” people start cooperatives. While “need” is a quick and easy way to describe why people start cooperatives, it is important to determine different needs in different contexts, as they are sometimes hard to identify. The discussion seeks to move towards examining how some of the “why” responses generated by the cooperative stories can be related to participants’ personal lives and experiences.

1. **FRAME:** Introduce the reportback and discussion as the time to explore the common themes in the cooperative stories that led to people creating cooperatives.
2. **REPORTBACK:** Move through a few of the Cooperative Stories and ask for the group participants:
 - What is the cooperative?
 - Who started the cooperative?
 - Why did they start the cooperative?
 - Was there anything about the story that jumped out at or surprised you?

A. RECORD: As participants reportback, fill out their responses on the “What, Who, Why, !!!” poster.
2. **DISCUSSION:** Using the following discussion format to direct a closing discussion exploring the “why” themes in the Cooperative Stories:

- Are all of the reasons in the “Why” column needs?
- Why might someone start a cooperative for a reason that is not a need?
- Are all the needs in the “Why” column needs of those people in the “Who” column?
- Do you know anyone who has had an experience similar to those in the “Why” column? What did they, if anything, do?
- Are there any reasons “Why” you might start a cooperative in your life or work right now?

- A. RECORD:** As participants discuss, write salient points or issues that are frequently shared on a piece of chart paper. If patterns or connections are discovered, try to indicate those on your notes by using arrows or other indicators.



USING COOPS



OBJECTIVES

- Provide an opportunity for participants to actively apply both their needs assessment skills and cooperative solution testing skills
- Provide an opportunity for participants to gain group process skills by working in peer groups with the goal of reaching a point of agreement and completing a shared task
- Provide an opportunity for participants to be applying their knowledge and new skills to determine if and how a cooperative solution could be relevant to their own life or community



TIME

- **90 minutes:** This timing can vary according to how many groups you will need to have present at the close of the activity. Allow for as much small group work time as possible.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- **Chart Paper**
- **Regular Markers**
- **Post-it Notes**

MATERIALS

- **Cooperative News Worksheet**
- **Cooperative News Scenarios**

POSTERS

- **Cooperative News Components (if not using worksheet)**



PREPARATION (continued)

ADAPTATIONS

➤ **Audience:** Sample scenarios are provided for the Cooperative News activity in the Appendix. You can use them as presented or as a model to create your own. Adapting scenarios can make the situation more relatable or relevant. One tactic for creating scenarios is to use a playful, fictional scenario that doesn't directly relate to participants' experiences or emotional responses (e.g. dinosaurs!). Having a fictional scenario is useful in two main ways:

1. you can address political or controversial concepts (e.g. discrimination, oppression) in a gentle way by using fantastical identities and characteristics that participants won't see themselves in and respond to personally, as well as
2. the activity can empower participants to use their imagination in the way a "real-life" example might not.

Another tactic is to use a known cooperative and make its origin story more generic by taking out all proper nouns or other identifiers (e.g. geography, industry, timeframe, etc.). Having a real-life example on which to base the scenario is helpful in two main ways:

1. it gives you an authentic response to skepticism or cynicism from participants that a cooperative solution is actually possible in a given scenario, and
2. it can demonstrate the flexibility of the cooperative model's application - as chances are that the solution a group imagines for the situation may be different from what actually happened in the real-life scenario. You can share all those iterations are valid and possible. *If you would like to focus on learning about flexibility, try having every group use the same scenario and seeing the different scenarios folks design.*

COOPERATIVE NEWS

In this activity, participants will work in small groups with a scenario that presents a need or challenge. They will seek to identify whether or not there is a cooperative solution. The intended cooperative solution is a *cooperative enterprise with a distinct membership and purpose*. Participants will be asked to both “make news” by designing the cooperative solution, as well as “report the news” from the perspective of the community’s response to the cooperative solution. To do the reporting, the groups will create a “front page” of an online news outlet or local newspaper.

1. **FORM SMALL GROUPS:** Have participants break into one or more groups of five (or fewer) people.
 - A. **DISTRIBUTE SCENARIO & WORKSHEET:** Give each group a scenario to explore - it is up to you if you’d like the groups to all use the same or different scenarios. *Sample scenarios are provided in the Appendix.*
2. **READ THROUGH SCENARIO & WORKSHEET:** Direct participants to read through their scenarios together. Then, have the group review the accompanying worksheet.
3. **FRAME:** Share that participants are to imagine themselves in that scenario, reflect on what their unique needs are in the situation, and consider whether or not a cooperative might be an appropriate tool for meeting their needs or addressing the challenge. Share that they will then be reporting from the perspective of a media outlet, but let the group know you will share more information for that after the making news portion is complete.
 - A. **PROVIDE INSTRUCTIONS:** Direct the groups to dialogue around the why, who, and what of their potential cooperative solutions. Share that while discussing some of the more technical aspects of the work can be worthwhile, focusing on getting a strong narrative about the reasons behind and process of creating the cooperative will be most useful for the remainder of the activity. If using the worksheet, urge participants to use those prompts to guide their conversation.
 - B. **ENCOURAGE RECORDING:** Instruct groups to take notes on their solutions so they don’t lose any of their thinking when they move from the discussion portion to creating their news stories.

- 4. RE-FRAME:** Once time has elapsed or all groups seem to be at a good transition point, share that the groups will now move on to reporting the news of the cooperative solution from the perspective of a media outlet.
- A. PROVIDE INSTRUCTIONS:** Explain that each group is to create a website or newspaper “front page” (on a large sheet of paper) including an article covering their cooperative solution. On the provided paper, they will construct their front page using the Article Components (described on the worksheet or written up on a poster) and anything else they feel is appropriate.

ARTICLE COMPONENTS

- Headline:** A few words, often not a complete sentence, that serves as the title to the main front-page article.
- Sidebars:** These are sub-statements, related to your cooperative scenario, that provide more detail than the headline. They include some of the technical and specific aspects of your discussion and subsequent plan, e.g. The new cooperative has already signed up 50 members!
- Quotes:** These are testimonials about the accomplishment or difficulties encountered as shared by anyone imaginable.
- Other:** Anything else you can think of that makes sense on a front-page, e.g. related articles with their own headlines, pictures, the weather, community announcements.

- 5. ASSESS UNDERSTANDING:** It is important to ask for clarification needs at this point in the process, as the task is somewhat complex.
- 6. BEGIN WORK:** Once you feel confident the groups understand the work ahead of them and feel equipped to complete it, let the groups begin drawing their cooperative news stories!
- 7. BRING GROUP BACK TOGETHER:** After work time has elapsed, assess readiness and if folks need more time. Once groups are ready, have the group each identify a presenter and frame out the presentation format before they select.
- A. PROVIDE INSTRUCTIONS:** To guide participants in presenting, clearly describe what should be included in the feedback and share the amount of time available for presenting their conclusions (e.g. “Present three of your front page components.” “Take up to five minutes.”).

8. **LEAD PRESENTATIONS:** Track time for each group and manage any questions for clarification that might come up with each presentation. Inform folks that there will be a general discussion following the presentations, so non-urgent commentary and inquiry will have a specific time.
9. **DISCUSS:** Once presentations are finished, ask if there are any observations or questions that participants would like to discuss. Engage the group as time allows.

UNDERSTANDING THE HOW

This section allows participants some quiet reflection time to start thinking more deeply about what actions they would need to take in order to apply a cooperative solution to needs or challenges they or their community are facing. Journalling gets people looking inward, and subsequent discussion supports them in bringing their reflections and ideas into the open, which is an important step in moving from idea to action.

1. **ASK:** What is a need or challenge in your life or community?

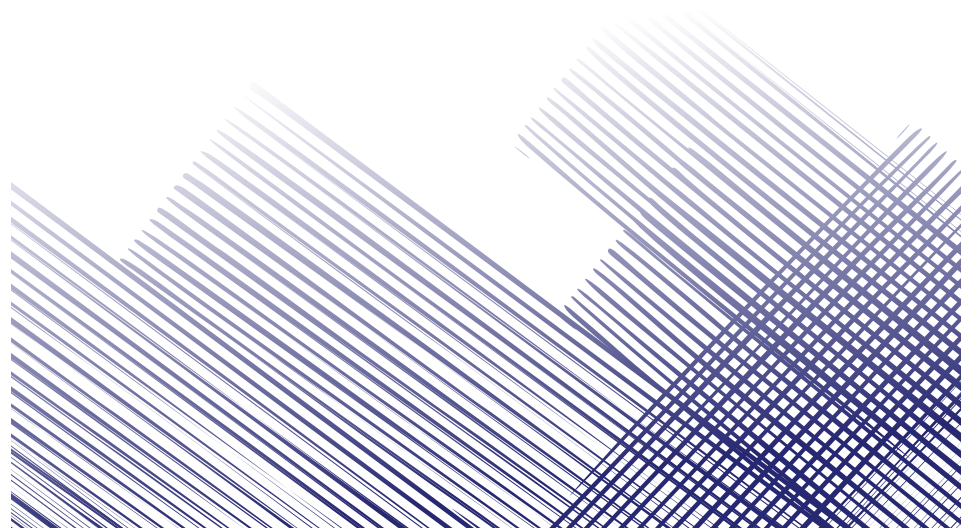
A. PROVIDE INSTRUCTIONS: Ask participants to respond to this question on one or more post-its (one need or challenge per post-it) and instruct each person to stick the post-it on an identified surface (e.g. front wall).

2. REVIEW & ORGANIZE RESPONSES: Have participants review the posted responses in a group. Encourage the reorganizing of post-its to indicate responses that are similar or related in some way.

A. READ RESPONSES OUTLOUD: After the organizing has been completed, having the group go back to their seats and read outloud the individual responses and summarize the groupings.

2. DISCUSS: Lead the group in a discussion around the following prompts, but be sure not to limit the conversation -

- Any patterns you notice or other observations you have about the collective needs/challenges?
- What kinds of cooperative solutions could be applied to some of these individual or groups of similar needs or challenges?



DEMYSTIFYING DEVELOPMENT



OBJECTIVES

- Explore and define “development” and “entrepreneurship,” as well as how these concepts are different in a cooperative context
- Provide a basic overview of the cooperative development process using the “Cooperative Development Continuum.”



TIME

- **45-90 minutes:** When needing to move through the content quickly, a basic presentation with some discussion of the information can be accomplished in forty-five minutes.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Chart Paper
- Markers (Chart)

POSTERS

- Cooperative Development Continuum Components

MATERIALS

- Cooperative Development Continuum



PREPARATION (continued)

ADAPTATIONS

- ◀ **Group Size:** For the Cooperative Development Curriculum activity, you will need participants to manage twenty total components that they will have to organize into a continuum.
 - If working with a group smaller than twenty, ask participants to manage more than one component at a time or structure the activity akin to doing a puzzle on a table (i.e. have the group look at all the components at the same time together).
 - If you have a larger group, you may want to assign two to four participants to leadership roles tasked with managing the pairing and ordering processes, or you may want to prepare two sets of Continuum Components and have the groups “compete” to see who can get done first.

Given that this activity requires a great deal of cooperation, you can also be creative in using the activity itself to generate learnings about the practice of cooperating in a group work scenario.

DEFINING DEVELOPMENT

In this presentation, you will unpack and explore the many definitions of the words “development” and “entrepreneurship” before applying it to the cooperative model and movement. Then, draw observations about common perceptions of these concepts and how they are different in the context of cooperation.

1. **FORM PAIRS:** Ask people to turn to the person next to them to share their thoughts on the following discussion question.

2. **ASK:** What are some definitions or concepts of development with which you are familiar?

3. **BRING THE GROUP BACK TOGETHER:** Bring the group’s attention back to you and ask for participants to share what they discussed.

A. **RECORD RESPONSES:** As participants respond, write answers on a piece of chart paper. Some examples of definitions are as follows - e.g. personal growth, real estate acquisition and renovation, economic development, business development, etc.

B. **ACTIVELY DEMYSTIFY:** Many concepts of development are rather opaque, so be sure to demystify and explain (or ask the group to explain) what each offered response is (e.g. development as a form of fundraising).

3. **ASK:** Are any themes or patterns evident in the responses?

A. **DRAW OUT THEMES:** Ensure to draw from the conversation that many of our commonly known concepts of development are -

- **\$\$\$:** Most development concepts are about growing assets that can be measured monetarily (e.g. fundraising, real estate).
- **Benefit Some At Cost To Others:** Some practices that are referred to as development only benefit a small subset of people in a system or community, and can disenfranchise others. The perhaps most frequent example of this issue playing out in development is well encapsulated in the difference in the following two terms often used by different groups to describe the same process:

» **Gentrification (n.):** The restoration and upgrading of deteriorated urban property by middle-class or affluent people, often resulting in displacement of lower-income people.

» **Economic Development (n.):** The sustained, concerted actions of communities and policymakers that improve the standard of living and economic health of a specific locality.

4. **FORM PAIRS:** Ask people to turn to the person next to them to share their thoughts on the second discussion question.

5. **ASK:** Let's zoom in on "business development" and the role of the person within that practice - entrepreneurs. Who are entrepreneurs that are well known in popular culture or that you know personally?

6. **BRING THE GROUP BACK TOGETHER:** Bring the group's attention back to you and ask for participants to share the names of the people - ask for descriptions or reflections on the people mentioned.

A. **RECORD RESPONSES:** As participants respond, write answers on a piece of chart paper.

7. **ASK:** Do these people share any characteristics? What are some themes or messages you've heard about these instances of entrepreneurship?

A. **DRAW OUT THEMES:** Ensure to draw from the conversation that many of our commonly known concepts of entrepreneurship are -

- **Identity & Privilege:** Most examples of entrepreneurs readily known by people are men. In US popular culture, most of the "entrepreneurs" are white, college-educated, cis-gender, and wealthy men - as demonstrated by a 2013 study from the National Bureau of Economic Research.
- **Individualistic:** The "Lone Wolf" narrative suggests an aggressive individual approach. This; however, is never true - creating an entity always takes more than one person, despite people identifying as a sole founder.
- **"Risking it All:"** The "pulling yourself up by your bootstraps" is a very American notion that entrepreneurs - even those with very little means - need to risk everything they have to build their business. This is not true - the above mentioned 2013 study also found that 80% of start-up cash came from familial wealth.

8. **DISCUSS:** Transition the group into a bigger discussion about the feelings they have related to the two concepts you just explored -

- Given the discussion up to this point, how does this make you feel about development and entrepreneurship in our society?
- Is there a relationship between these concepts and the Profit Paradigm (from "Cooperation 101")?
- Might or might not some of these aspects of Development and entrepreneurship change in an explicitly cooperative context? How?

A. **RECORD RESPONSES:** As participants respond, write answers on a piece of chart paper.

B. DRAW OUT THEMES: Ensure to draw from the conversation the following key ways in which adding “Cooperative” changes the concepts from the conventional notions of Development and Entrepreneurship. Some examples relating to Entrepreneurship are as follows:

- **Entrepreneurship can be collective:** It is possible to start-up an enterprise as a group, in fact, it is often more feasible for the entrepreneurs to do it in a supportive group structure.
- **Collectivize risk to minimize it:** By working together with others, you can pool resources in order to try to develop a cooperative project without any individual putting everything they have on the line. While there is still risk, it can be minimized by sharing it with each other.
- **More inclusive:** Since Cooperative Entrepreneurship processes don’t involve “risking it all” or dedicating the majority of a single person’s waking hours to developing the enterprise, the process is more accessible to those with fewer resources (e.g. low-income) or less flexible time (e.g. parents).

9. ASK: Where can you see yourself in conventional concepts of Development and Entrepreneurship? And, where can you see yourself in cooperative concepts of Development and Entrepreneurship?

A. RECORD RESPONSES: As participants respond, write answers on a piece of chart paper.

B. GENERATE EMPOWERMENT: These two questions are intended to get people envisioning themselves as cooperative entrepreneurs or in empowered roles in cooperative development processes. Respond to the reflections of participants in a way to affirms the potential of everyone in the room to be a cooperative entrepreneur.

DEVELOPMENT CONTINUUM

This section and the continuum model serve as a way to breakdown the complexities of the cooperative development process into smaller, more comprehensible pieces. The Cooperative Development Continuum, comprised of ten different steps, serves as a roadmap to orient someone to where they are, have been, and have yet to go, as a cooperative entrepreneur, in their cooperative development process and thinking.

1. **FRAME:** Introduce this section as a way to get a basic overview of all that the cooperative development process can entail for an entrepreneur. Frame the goal of the session as a basic understanding of the process; not to move through each step of the continuum in great detail.

2. **PRESENT:** Explore the definition of “continuum” and describe why it is especially descriptive of the cooperative development process -

» **Continuum (n.):** A continuous extent, succession, or whole, no part of which can be distinguished from neighboring parts except by arbitrary division.²

3. **ASK:** Are there any other processes that you know of that act in the way described in the definition for Continuum?

4. **INTRODUCE THE CONCEPT OF THE COOPERATIVE DEVELOPMENT**

CONTINUUM: Share that the Cooperative Development Continuum is the process by which people start or improve cooperatives. By broadly understanding cooperative development as an ongoing process, it becomes easier to orient and assess your progress and work.

→ Continuum is used to describe the cooperative development process, because the phases and tasks **don't always happen in a predetermined order**, and phases often **don't neatly start and end** at the same time

5. **PASS OUT CONTINUUM COMPONENTS:** Spread the Continuum Components equitably among the participants or in a single location for folks to access (refer to the Adaptations if you have trouble managing having too many or few Continuum Components for your group). Share that there are two types of components → Phases and Descriptions. There is one Description for every Phase.

A. **READ OUTLOUD:** As you are distributing or arranging the components, read them outloud - either by reading them yourself or asking the folks each participant to read outloud the component you hand them.

² wordnik.com/words/continuum

6. **PROVIDE INSTRUCTIONS:** Direct participants to move around the room to find the match to whatever component they hold. Once they have their partner, have them sit down or move to the edges of the space to indicate they are done.
7. **BRING THE GROUP BACK TOGETHER:** As most of the participants seem to have a match, bring the group back together for a reportback. If the group seems to be having trouble finding partnership, bring the group back together and work to engage folks in collectively exploring possible connections.
8. **REPORTBACK & DISCUSSION:** Going around the room, have each pair or group read their Phases and Descriptions outloud. If participants object to certain matchings, allow them to discuss it.
 - **Note:** Try not to use this time to correct or advise on matchings, but do share that any uncertainty about pairings may be more easily resolved when going through the next continuum creation step of the activity (i.e. the group does not have to be totally certain of their pairing before moving to the next step).

If you have folks in leadership roles, allow them to guide the process - providing as much support as is necessary to keep the activity's timing on track.

9. ASK: Is everyone satisfied with the matching as they are arranged now?

- If the group is satisfied - move onto the next step.
- If the group or some individuals are not satisfied - ask for those who are unsatisfied to talk through their thinking until you can get the group to consensus about moving to the next step. By asking explicitly for consent, you'll draw out folks with differing ideas but who may have been hesitant to propose them in the informal group process.

10. **PROVIDE INSTRUCTIONS:** Direct the group to dialogue with one another to coordinate the placement of their components combinations into a continuum that makes sense to them. Provide only minimal logistical or administrative input - i.e. let the group put their components up where they think they belong and to do it as they see fit (practicing cooperation!).

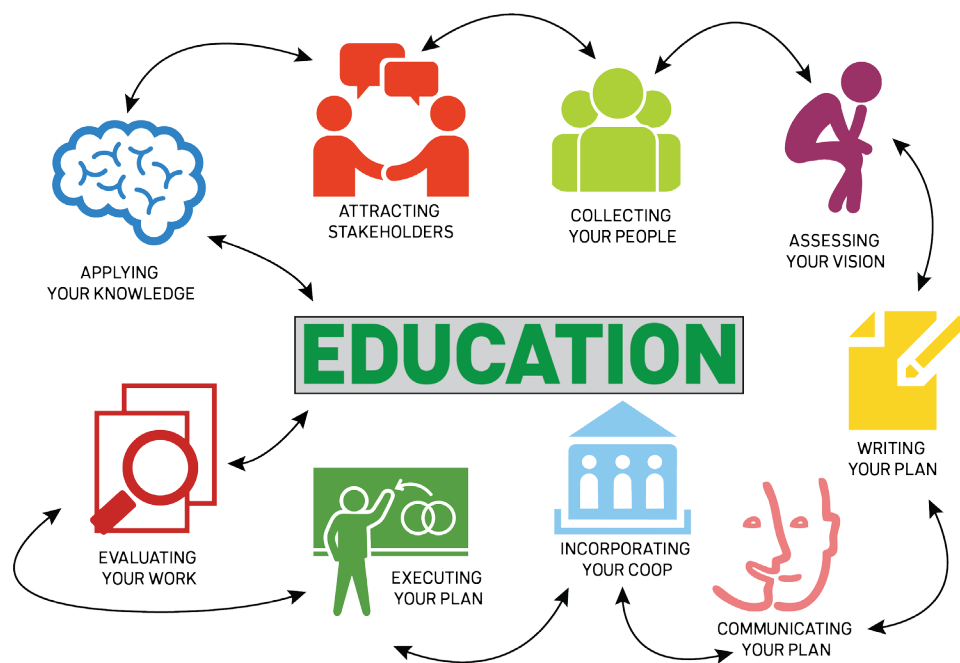
11. **REPORTBACK & DISCUSSION:** Going around the room, have each pair or group read their Phases and Descriptions outloud in order. If participants object to certain matchings or the order of phases, allow them to discuss it together and rearrange themselves, as desired.

12. ASK: Is everyone satisfied with the pairings and arrangement of the components?

- If the group is satisfied - move onto the next step.
- If the group or some individuals are not satisfied - ask for those who

are unsatisfied to talk through their thinking until you can get the group to consensus about moving to the next step.

The following is provided for ease of reference - refer to the Appendix for a larger version.



13. SOLICIT REFLECTIONS: Ask for any immediate reflections on the Continuum as presented.

- A. SHARE AMENDMENTS:** If any of the phases aren't positioned or matched correctly, share how they are otherwise intended. Ask if that makes sense to participants. It is your choice whether or not you "correct" the visual continuum created by participants.
- B. SHARE THAT THIS CONTINUUM IS VARIABLE:** The continuum presented is **an estimation of an ideal cooperative development situation.**
 - Some cooperative developers choose to modify an old adage to address the flexibility of the cooperative model, which contributes to the uniqueness of each cooperative, **"When you've seen one cooperative, you've seen... one cooperative."** This remains true of the cooperative development process, as well. There is no perfect way to fill out the continuum or move through it in real life.
 - An overall **timeline for a development project is hugely variable.** It can stretch from weeks to years, depending on a number of factors.

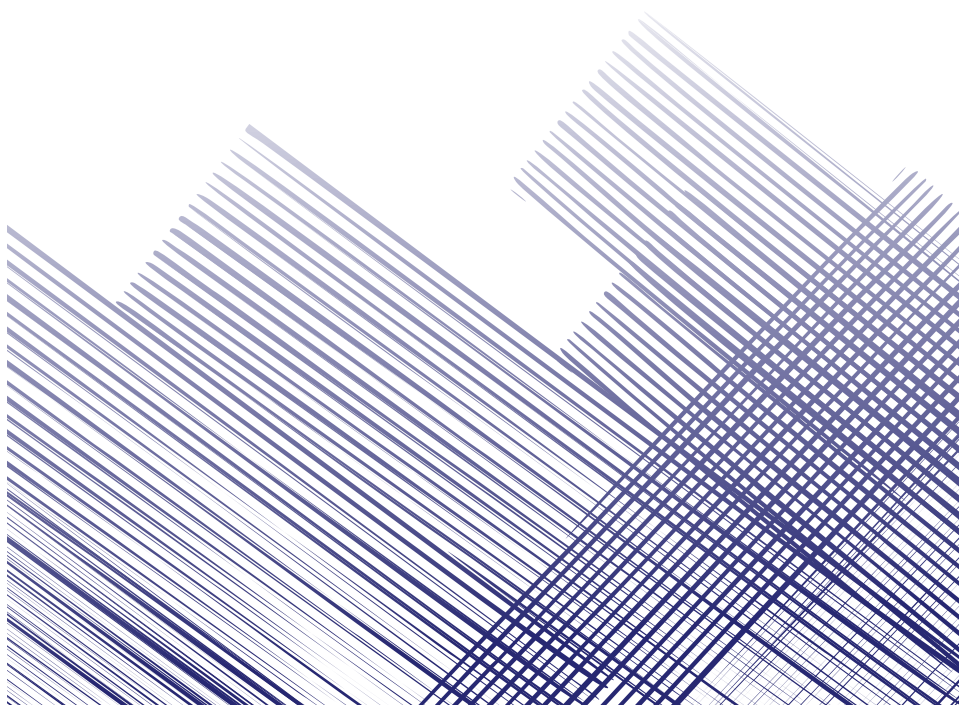
14. ASK: How might this differ from a conventional business development process? What steps might be unique to cooperative development and entrepreneurship?

A. DRAW OUT PATTERNS: Specifically, ensure that the group draws out that the steps involving people and community engagement are those present in cooperative entrepreneurship processes, and typically absent in conventional development processes.

15. DISCUSS: The process the group just undertook was a group work process akin to “Applying Your Knowledge” - where you’re moving your personal learnings and reflections into a group organizing process. It is important to be aware of how we operate as individuals in those processes.

- How cooperative did you feel the process was?
- Where there things you think could have been done better?
- Did you share those ideas at the time?
- Why or why not?

16. PROVIDE CLOSING REFLECTION: Share that cooperation and group process happen in our lives every day - sometimes we notice and sometimes we don’t, sometimes there are explicit guidelines to support us in cooperating and sometimes there aren’t, sometimes the steps we must take to achieve success are clear and sometimes they aren’t. If using the next section, reference that the group will be exploring these dynamics more deeply then.



WHAT'S YOUR PROCESS?



OBJECTIVES

- Introduce the concept of “group work” and “group process”
- Explore how group process takes place even when we aren't fully aware through a Bus Stop roleplay
- Explore and make explicit how we build and lose trust in interpersonal relationships



TIME

- **60-90 minutes:** The “Riding the Bus” activity typically takes 20-30 minutes, so any extra time to play with is in the “Building Trust” section.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Chart Markers

MATERIALS

- Signs or Props for Bus Roleplay (optional)
- Turf, Trust, Time

POSTERS

- Turf, Trust, Time

RIDING THE BUS

This section describes the invisible processes that take place when people come together to work in a group. It also shares key tools for improving the group process by making it more democratic.

- 1. SET UP THE SPACE:** Before beginning, set up in a row of three chairs to represent a bench at a busstop in an open and visible space in the room. If you would like, you can also post a sign that says “Bus Stop” or include other details to make the scene more interesting.
- 2. FRAME:** Introduce this section by underscoring the importance of working well in a group. This message sounds simple, but is often one of the most challenging aspects of cooperative development.
- 3. SOLICIT VOLUNTEERS:** You will need at least five people to move to the front of the room to role play getting on a bus. Invite the five volunteers to the bus stop set-up in the room.
- 4. ASSIGN ROLES:** Explain that, except for one person driving the bus, each person is waiting to take the next bus arriving at the bus stop. Then, assign each of the following unique characteristics to each of the volunteers (if any of these descriptions are also true of the volunteer, go ahead and have them role playing using their own characteristics):
 - **Driver:** Is the bus driver, will drive the bus up to the stop, as well as operate the door, lower the ramp (if needed), and complete any other tasks reasonably expected of a bus driver
 - **Rider 1:** Just went grocery shopping - has two heavy bags; Has dollar bills for fare
 - **Rider 2:** Has visibly limited physical mobility (e.g. on crutches); Has a bus pass
 - **Rider 3:** Is anxious to get home after a long work shift; Has a bus pass
 - **Rider 4:** Is listening to headphones; Has all coins for bus fare
- 5. PROVIDE INSTRUCTIONS:** Explain that the role play will start with the driver approaching the stop, those waiting at the bus stop will board the bus and pay fare, and they will then find a spot to sit or stand.
- 6. CHECK FOR UNDERSTANDING:** Ask if any clarification is needed before the group begins the role play.

7. BEGIN ROLE PLAY

8. **DEBRIEF ROLE PLAY:** After the role play completes, keep the role play participants at the front of the room and lead a debrief conversation using the following prompts (some are directed at specific people) -

- Are there any immediate reflections or observations from the role play? (*all*)
- Did you think about how you were going to board before beginning to board the bus? (*ask Riders 1 & 2*)
- Were there any decisions you made during the course of the role play? (*ask Riders 3 & 4*)
- Did there appear to be any disagreement among the riders about the order in which the riders should board the bus? (*ask audience, then Riders*)
- Who had the most power in the role play? Did anyone take advantage of their power for their own or the group's larger benefit? (*all*)

9. **THANK VOLUNTEERS:** Direct the volunteers to return to their spots and thank them for participating.

10. **REFRAME ACTIVITY:** Share that what was just role played is a form of group process. Even mundane, everyday activities undertaken with no or very few words can include a group people making decisions on their own and collectively in order to achieve shared or similar goals.

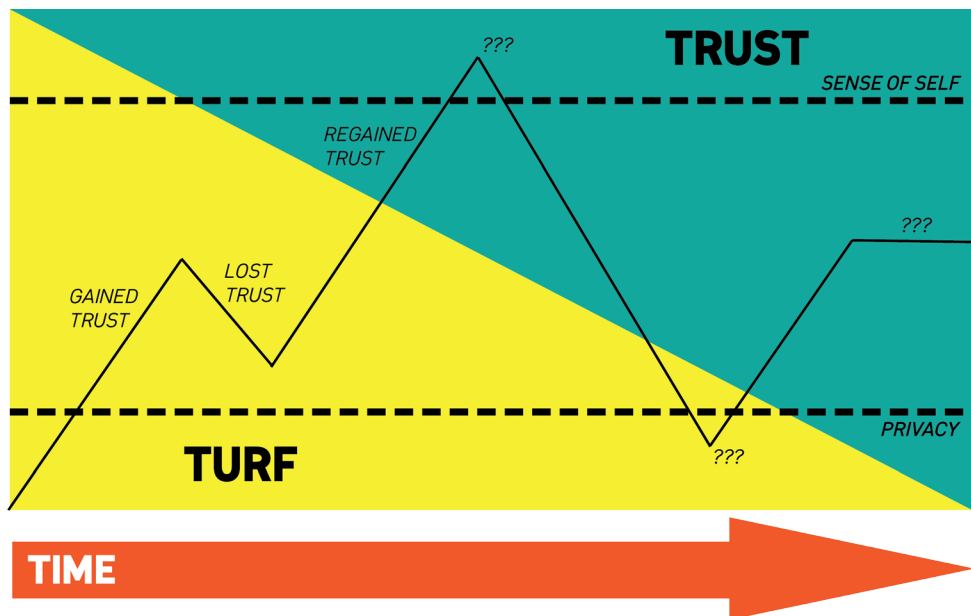
11. **PRESENT:** Despite how ubiquitous group process is in our lives, democratic process in groups it is not something that is routinely taught in most conventional educational institutions. Still, it remains an incredibly important skill set most people need to be successful in their life.

- Group process is an intimate reflection of how we operate in the larger society - symptoms of systems of oppression (such as racism, sexism, classism) are often augmented in group work.
- Since these kinds of behaviors are more easily identified in small spaces and individuals can communicate with one another directly, they have greater potential to be addressed. It is often more challenging to address them in larger and less intimate spaces.

BUILDING TRUST

Trust is a necessary element in group process, and this section walks participants through exploring how trust is created and destroying in our relationships. Many of us have learned how to manage trust in relationships with ourselves and others only “by doing,” so this activity seeks to draw on our collective experiences to explicitly identify patterns and methods for how trust can be gained, lost, and regained.

1. **FRAME:** Open up the activity by explaining that trust is a necessary component of successful collaboration, but we often don’t talk about how we go about building and maintaining trust.
2. **SHARE & PRESENT:** Direct participants’ attention to the Collaboration Continuum. To guide participants in understanding what the continuum presents, move through the following -
 - A. **DEFINE CONCEPTS:** Break down the following definition of “Collaboration” by applying concepts used in the continuum -
 - » **COLLABORATION:** the process that makes it possible to reach a goal that cannot be achieved by one person or agency alone. This implies a need for negotiation and agreement about the goal and strategies.³
 - **TURF** is control over your own resources, ideas, and plans.
 - **TRUST** in one another and the shared process that is foundational for giving up any Turf.
 - **TIME** it takes to develop process, build Trust, and share Turf.



³ ACT Center for Youth Excellence
<actforyouth.net/youth_development/communities/collaboration.cfm>

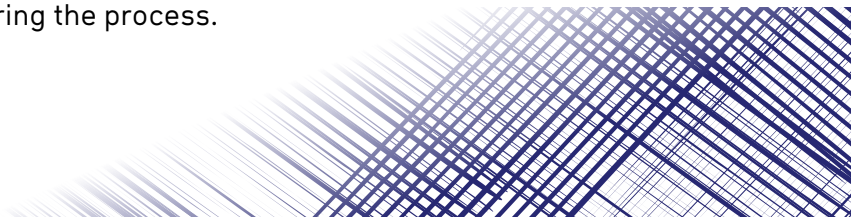
3. DISCUSS: Frame the discussion process by explaining that the group is going to track what happens as a relationship evolves over time (x-axis) and as trust is gained or lost (y-axis). You will map the real-life relationship dynamics of participants on the poster of the Collaboration Continuum. Use the following questions to move through the discussion and draw out mappable points.

- What is a story of a time that you **gained trust** with you a person - when you felt you crossed a threshold to be able to deepen your reliance or relationship with the person (e.g. loan them money, tell them a secret)?
- What is a story of a time that you **lost trust** with someone?
 - Did you ever **regain trust** with that person?
 - If so, how? If not, why not?
- Do you have a **lower bound of turf** that you feel the need to maintain?
 - If so, what does that turf represent to you?
 - Does “sense of self” resonate with regard to the lower bound?
- Do you have an **upper bound of trust** that you would not cede to another person or persons?
 - If so, what does that trust represent to you?
 - Does your personal privacy resonate with regard to the upper bound?

A. MAP STORIES: As participants are sharing their stories, draw a line mapping trust built and lost across time on the chart. Label surges and drops in trust with key phrases or words (e.g. “did not apologize,” “betrayal,” “kept their word,” etc.).

→ Work with the group to attempt to identify if and what the upper and lower bounds are - often, the bounds are seen to represent the boundaries we have to protect our “Sense of Self” and maintain our unique “Identity.”

4. CLOSE OUT: Wrap up discussion by soliciting questions and general comments on what the group mapped together. Take the time to mention some of the key learnings or observations that came up during the process.



ORGANIZING YOUR PEOPLE



OBJECTIVES

- Provide an opportunity to experience democratic process and cooperation by setting up a Steering Committee
- Provide an opportunity for peer-to-peer learning and decision-making



TIME

- **90-120 minutes:** Be sure to reserve no less than 60 minutes for the full “Taking the Wheel” activity.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Scrap Paper
- Pens & Pencils

MATERIALS

- Character & Cooperative Creation: Steward’s Guide
- Character & Cooperative Rolling Key
- Character & Cooperative Role Sheet
- Steering Committee Agenda

POSTERS

- Key Group Process Concepts



PREPARATION (continued)

ADAPTATIONS

- **Audience:** For this role play activity, you have the option to allow for participants to randomly create identities of different employment status and income level. You may elect to pre-determine certain identity aspects, rather than have participants randomly roll for them - e.g. if working with a student group, having each participant role play a character with their same education status.
 - Be aware that, through roleplay, some issues may come up regarding the level of awareness of your participants with regards to the functioning of racism, sexism, homophobia, transphobia, classism, etc. While this has the potential to create space for education, it can also make the space unsafe, and can derail the ultimate objectives of the role play. Reflect on what level of engagement you feel comfortable having with the dynamics of identity and prejudice as part of this activity - and, assess how much of that is engagement is possible while meeting the workshop objectives.

THE MEETING

After exploring in the previous workshop how group process operates in our lives on a daily basis, as well as how we build and lose trust in our interpersonal relationships - this section will introduce some explicit concepts and practices that can be useful in making group process more effective. A frequently occurring form of group process that takes place in cooperative entities is the meeting.

- 1. FRAME:** Riding the bus is a great way to illustrate the regularly occurring instances of group process in our lives. In every process like riding the bus, we are either gaining or building trust with other individuals. In cooperatives organizations, a meeting is a frequently occurring form of group process. In order to make meetings go a little smoother, some guidelines and practices have been made explicit so everyone is aware of and can abide by those shared standards.
- 2. PRESENT:** Some of the many important concepts for meetings within developing cooperative organizations that are important to learn and use are:

KEY GROUP PROCESS CONCEPTS

◀ FACILITATE

Generally, an act that makes a task easier for others; in the context of a meeting, making an experience more inclusive and effective through effective facilitation of the discussion/s inherent in spontaneous communication exchanges during a scheduled group meeting.¹

◀ QUORUM

The minimum number of relevant members who must be present at a noticed meeting for those members to conduct business (i.e. make decisions) in the name of the group.

→ E.g. - a majority of voting members, a supermajority of 65% of voting members

◀ DECISION-MAKING METHOD

The process by which a group determines an opinion or course of action.

→ **Voting** – everyone provides their vote and, typically, a decision is made if a pre-determined percentage of voters agree (e.g. 51%, 85%, majority, etc.

→ **Consensus** – everyone involved must be able to live with the final outcome of the decision.

¹ Seeds for Change, "A Consensus Handbook" 2013: Leeds, UK, p 220

- A. READ OUTLOUD:** Move through each of the above concepts, reading or asking others to read them outloud.
- B. SOLICIT STORIES:** To tie the concepts to folks' experiences,

query the group for instances when they or someone they knew used any of the included concepts.

⚡ If some of the concepts are not addressed by participant experiences, you can offer up your own or the following examples to elaborate:

3. PAIR SHARE: Ask participants to turn to the person next to them and respond to the following question -

4. ASK: What is the worst group process experience - formal or informal - that you've ever had?

5. CLOSE OUT: Pull pair share responses from the group - drawing out any themes or patterns in the experiences of participants. Share that the group will be moving into using some of the concepts in the next activity.

TAKING THE WHEEL

Using a fictional scenario with assigned roles, participants will role play as a group of people interested in starting a cooperative. Their task is to build trust in their group, institute group practices for how to work successfully as a group, and form a Steering Committee that is committed and accountable to continue the work of realizing the vision for the cooperative.

1. **FRAME:** Share that the group will role play the process of forming a Steering Committee from a diverse group of people. It is imperative that we understand how power is structured in society so we can manage it in the groups that we create. Remind people to keep in mind the role of power in their group work by calling up what was learned through the “What’s Your Analysis” activity from “Beginning the Work.”
2. **DEFINE:** Present the following definition of a Steering Committee, so the group understands the entity they are role playing -

◀ STEERING COMMITTEE

A body within a project or enterprise that supports the guiding of its work. Its main concern is the making of strategic decisions concerning the future realization of the project or enterprise.¹

¹ Seeds for Change, “A Consensus Handbook” 2013: Leeds, UK, p 220

3. **SHARE GOALS:** Set out the goals for the activity:
 - » Decide how to decide (i.e. pick a decision-making method)
 - » Identify the needs of the people involved
 - » Identify the capacity of the people involved
 - » Built trust within your group
4. **SOLICIT VOLUNTEER(S):** Ask for one volunteer for every five people in the group who is willing to serve as the “Steward” and guide a small group through a dice rolling process to determine each person’s role and the type of cooperative start-up they will be role playing. If any participants have experience playing tabletop Role Playing Games (RPGs - e.g. Dungeons & Dragons), the task will be familiar to them.
 - A. **REVIEW CHARACTER & COOPERATIVE: STEWARD’S GUIDE:** As the group is discussing the following question in pairs, move through the guide with the volunteers as a group, ensuring comprehension of what it asks of them.

5. **ASK (for discussion while Steward’s are gathered):** What is the best group process experience - formal or informal - that you’ve ever had?

- 6. FORM SMALL GROUPS:** Create groups of five (or fewer).
 - A. DISTRIBUTE CHARACTER & COOPERATIVE ROLE SHEET:** Give the worksheet to all participants and ask them to read it through while the “Stewards” get set-up.
 - B. DISTRIBUTE DICE:** Give a die or set of dice to each “Stewards.”
 - C. ASSIGN “STEWARDS:”** Match up each small group with a “Steward.”
- 7. PASS LEADERSHIP:** Once the groups are coordinated, pass leadership off to the “Stewards” to walk through the Character and Cooperative creation process laid out in the Steward’s Guide.
- 8. MONITOR ACTIVITY:** As participants are creating their characters and cooperatives, move around the room to answer any questions that may arise.
- 9. BRING THE GROUP BACK:** As participants finish up the character and cooperative creation process, bring their attention back to you.
- 10. REFORM SMALL GROUPS:** Direct participants to regroup as they were before, and hand off leadership to the Facilitator in each group identified in the character and cooperative creation process.
- 11. MONITOR ACTIVITY & PROVIDE TIMECHECKS:** Listen in and provide input if requested during the activity time. Additionally, provide “time checks” - let groups know how much time has passed and how much time remains to assist folks in following their agenda in order to meet the group’s goals.
- 12. PREPARE FOR PRESENTATIONS:** Let folks know at this point that they will need to decide, using their agreed upon group process practices, how to present the following information to the larger group in 5 minutes or less:
 - Who are the people, generally, involved in your cooperative

endeavor?

- What kind of cooperative solution are you pursuing?
- Anything exciting or notable to share?

13. BRING GROUP BACK TOGETHER: Check in with groups to determine group progress. Groups that haven't finished should be encouraged to wrap up their conversation and to decide which agenda items or issues they will need to address in a future meeting

14. LEAD PRESENTATIONS: Lead the small groups through their presentations, providing time checks, as needed.

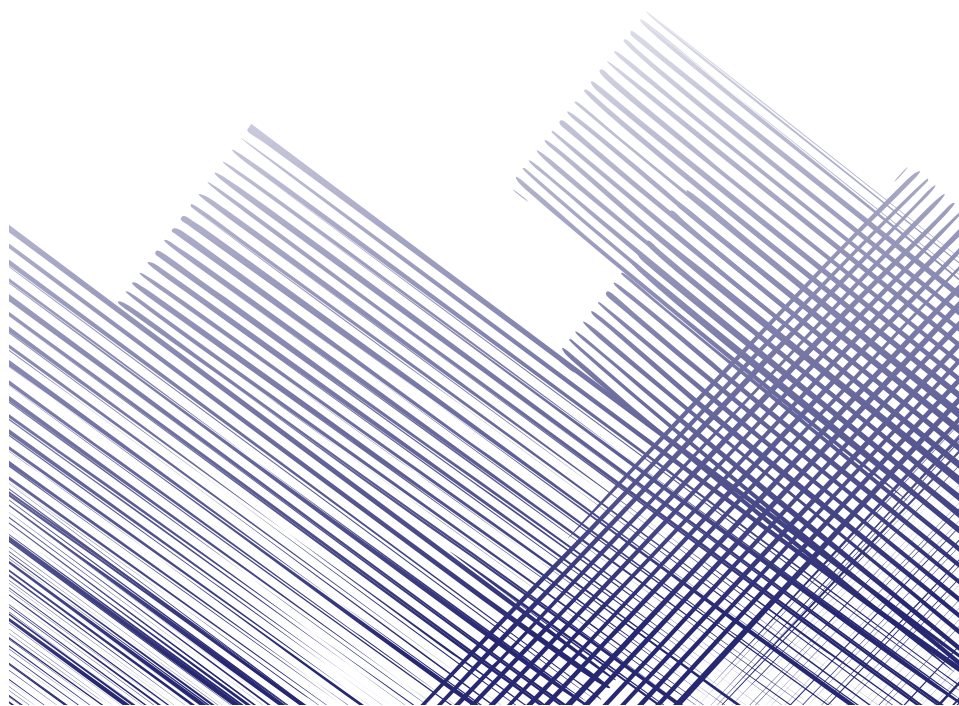
15. DISCUSS: When you call the group together after time has elapsed or all groups have completed their agenda items, guide a large group discussion using the following prompts -

DESCRIBE: *Was the process easy for you? Hard for you?*

REFLECT: *Did anything surprise you about the process?*

INTERPRET: *Did you feel you accomplished the goals?*

APPLY: *What might you have done differently? Why?*



WHAT'S THE PLAN?



OBJECTIVES

- Provide an opportunity for peer-to-peer learning and decision-making
- Provide an opportunity to experience the first steps in moving from ideation to a written articulation and action plan of the initial vision
- Introduce the components of a Business Plan



TIME

- **90-120 minutes:** Be sure to reserve no less than 60 minutes for the full “Getting Down to Business (Planning)” activity.
- **Add 15-20 minutes:** If beginning or ending your engagement with a group using this training, you will need to incorporate an opening and/or a closing session similar to those in “Beginning the Work” and “Bringing It All Together,” respectively. Refer to those sections for tips on how to introduce and close workshops.



PREPARATION

SUPPLIES

- Scrap Paper
- Pens & Pencils
- Post-its

MATERIALS

- Character & Cooperative Creation: Steward's Guide
- Character & Cooperative Rolling Key
- Character & Cooperative Role Sheet
- Coop Biz Plan Agenda
- Coop Biz Plan Learning Aid



PREPARATION (continued)

ADAPTATIONS

- ◀ **Audience:** For this role play activity, you have the option to allow for participants to randomly create identities of different employment status and income level. You may elect to pre-determine certain identity aspects, rather than have participants randomly roll for them - e.g. if working with a student group, having each participant role play a character with their same education status.
 - ◀ Be aware that, through roleplay, some issues may come up regarding the level of awareness of your participants with regards to the functioning of racism, sexism, homophobia, transphobia, classism, etc. While this has the potential to create space for education, it can also make the space unsafe, and can derail the ultimate objectives of the role play. Reflect on what level of engagement you feel comfortable having with the dynamics of identity and prejudice as part of this activity - and, assess how much of that is engagement is possible while meeting the workshop objectives.

WHAT, WHO, WHEN, WHERE, WHY

This section provides an overview of one process for moving from “idea” to “plan.” Foundational knowledge is built by playing a game to identify what kinds of information are included in a business plan - specifically, “what, who, when, where, and why” of a Business Plan. Following, participants will use those basic groupings of information and practice reorganizing it into a more formal plan format.

1. **FRAME:** Introduce this section as being, at its most fundamental level, how an idea or conversation moves into a plan that will ultimately require group consensus for implementation. More specifically, it is about how to write a Business Plan – one method for moving from idea towards action.

2. ASK: What is a Business Plan?

- A. **CONTRIBUTE:** As participants respond to the question, fill in any gaps and add your own thoughts and perspectives in order to present all of the following information -

- **(Cooperative) Business Plan (n.)** - A summary of how the cooperative endeavor will be organized and implemented to ensure success of the resulting enterprise.

- **It is a document or group of documents**, exploring the who, what, where, why, when, and how of your cooperative enterprise.
- **A Business Plan is a form of creative writing.** It is a chance to tell others about the co-operative magic you are creating, about the alternative economies you are crafting, and about the equity you are building for all people. It also serves as a chance for you to add to the story of the cooperative movement!

3. **FORM SMALL GROUPS & DISTRIBUTE POST-ITS:** Form groups of five or fewer and distribute stacks of post-its to each person.
4. **PROVIDE INSTRUCTIONS:** Share that the kinds of things in a Business Plan are the kinds of information anyone impacted by a cooperative’s development might want to know. It isn’t necessarily highly technical information - it is the story of the project. Using one post-it per item, we’ll journal the kinds of things we or that we think others might want to know about a given cooperative scenario. We’ll then work in our small groups to organize the post-its into “what, who, when, where, and why” categories to prepare us to move them into a more formal Business Plan outline. Notice there’s no “how” included - that is what the cumulative responses to the “W” words will illustrate.

- A. SHARE COOPERATIVE SCENARIO:** Present a simple cooperative scenario of a start-up organization using either:
- » A Cooperative News article developed by participants in the “Coops As Tools” workshop;
 - » One of the cooperatives broken down into “Who,” “What,” “Why,” and “?!” in the “Using Coops” workshop - present it in narrative format, not verbatim in the “Who...” format; or
 - » Use a real or fictional cooperative scenario and present the “Who,” “What,” “Why,” and “?!” information - present it in narrative format, not verbatim in the “Who...” format.

5. ASK: If you were a stakeholder in the community impacted by that start-up cooperative, what kinds of things would you want to know about the project?

6. TRANSITION FROM JOURNALING TO SMALL GROUP WORK: After sufficient time has elapsed, direct participants to turn to their small groups and start organizing their post-its together into the following categories: “Why,” “What,” “Who,” “How,” and “When”

A. PROVIDE INSTRUCTIONS: Once all post-its are grouped, instruct the small groups to further categorize, remix, and rename the clusters in a more descriptive and/or specific way. Then, order those newly named clusters in an order that makes sense to the group for a Business Plan.

7. BRING THE GROUP BACK TOGETHER: Once the small group work is complete, bring the group’s attention back to you. Share that they’ve essentially created a Business Plan Table of Contents, and that they’ll present their Table of Contents after comparing it to Table of Contents you provide.

8. PRESENT: Share the following Business Plan Table of Contents, and briefly describe each heading in one to two sentences (*use the Learning Aid in the Appendix for guidance*)-

- ◀ **SUMMARY I:** What, Why, & Who
- ◀ **STRUCTURE:** Membership & Management
- ◀ **CONTEXT:** Market & Niche
- ◀ **STRATEGY:** Outreach & Marketing
- ◀ **CAPITAL:** Financing & Fundraising
- ◀ **PLANNING:** Risks & Obstacles
- ◀ **ASSESSMENT:** Goals, Objectives, & Benchmarks

A. PREPARE GROUP FOR PRESENTATIONS: Ask the small groups to discuss together what differences and similarities they see between what was just presented and what they developed independently. Direct each group to identify a person or person to present the key similarities and differences to the large group.

9. LEAD PRESENTATIONS: Move through the group presentations, providing timechecks, as needed. Take notes on some key patterns to prepare for the digestion discussion following presentations.

10. DISCUSS: Once all the groups have presented, lead a digestion discussion using the following prompts, and try to draw out the subpoints listed below some of the questions -

Anything jump out or surprise you about the process or the items included in the Table of Contents?

→ You already know a lot of the stuff in here!

Does filling out the information in the Table of Contents seem easier or harder than you thought?

→ **It's likely easier than you think:** Often, you can begin your Business Plan without calling it that - by just gathering the evidence of your progress in a single document space, you are actually beginning the writing process!

Given the content in a Business Plan like this, when do you think you might be ready to start working on a Business Plan during the entrepreneurship process?

→ **Don't wait until you "have it all figured out:"** Think of your Business Plan as a "living document" - meaning you will put many things into it as you go along, changing and updating it over the course of the weeks and months. While it may seem counterintuitive, you will likely find that having something written down makes things more concrete (less abstract!), so your group can more easily make clear decisions and commit to actions.

Knowing now roughly what is included in a Business Plan, how would you go about writing one in a cooperative entrepreneurship process of your own?

- **There are countless ways to go about writing a Business Plan:**
There is no perfect or wrong process, and what ends up working for one group - but, here are some tips...
 - » **Start with a Table of Contents:** Create a Table of Contents in a document. Add information to the appropriate section/s as you have it drafted (could be general info, links, or finished narrative).
 - » **Delegate Duties:** Delegate sections and tasks to individuals and sub-committees to share the workload and to play to the expertise in your group (e.g. Ask the Finance Committee to complete items related to budgeting.).
 - » **Centralize Coordination:** Assign at least one person be responsible for collecting all contributions into a single document; add the responsibility of generally managing the creation process – including providing deadlines (when necessary) and following up with those responsible for contributions to support them in ensuring they get the work done on time.
 - » **Editing & Finishing is an important task:** Assign one person or a small subcommittee of folks to be responsible for “finishing” the document. This involves editing the entire document to ensure that language is coherent throughout, as well as that the document is nicely formatted - making it visually cohesive and appealing.

11. ASK: Why bother with any of this? What about the process or the product is useful or important?

- ⚡ A Business Plan **articulates your cooperative vision to others** in and on your own terms - you can tell your story in an empowered and uninterrupted way!
- ⚡ A Business Plan **is an accountability tool.** Having something written (business plan) that everyone can commit to helps with accountability and keeping track of agreements across time.
 - » **Get the kinks out:** It can help to clarify disagreement or conflict around issues – you are able to focus dialogue around the written articulation (Business Plan).
- ⚡ **Your business plan can be a way to legitimize your project.** People often hesitate to support projects, financially or otherwise, that can't be demonstrated to be well organized, feasible, and beneficial to those involved.
- ⚡ **Safeguard a project's sustainability** - people can be transient, so sometimes projects will get started and not finished. With a plan, someone can pick up where you left off without much effort.

GETTING DOWN TO BUSINESS (PLANNING)

Through role play, participants will move through the process of turning an idea into something actionable through the authoring of an outline for a Business Plan. The activity seeks to provide participants an opportunity to practice identifying all the elements that need to be considered for a successful Business Plan.

1. **FRAME:** Explain that the group will be roleplaying a meeting of their stakeholder group that includes walking through a Business Plan Table of Contents and answering questions as a group to get a better idea of what actually goes into a plan.
2. **SHARE:** Distribute the Coop Biz Planning Agenda to the group.
3. **SOLICIT VOLUNTEER(S):** Ask for one volunteer for every five people in the group who is willing to serve as the “Steward” and guide a small group through a dice rolling process to determine each person’s role and the type of cooperative start-up they will be role playing. If any participants have experience playing tabletop Role Playing Games (RPGs - e.g. Dungeons & Dragons), the task will be familiar to them.
 - A. **REVIEW CHARACTER & COOPERATIVE: STEWARD’S GUIDE:** As the group is discussing the following question in pairs, move through the guide with the volunteers as a group, ensuring comprehension of what it asks of them.
4. **ASK (for discussion while Steward’s are gathered):** Have you ever planned an event? How did you go about planning it? How did you keep track of decisions made and things yet to do?
5. **FORM SMALL GROUPS:** Create groups of five (or fewer).
 - A. **DISTRIBUTE CHARACTER & COOPERATIVE ROLE SHEET:** Give the worksheet to all participants and ask them to read it through while the “Stewards” get set-up.
 - B. **DISTRIBUTE DICE:** Give a die or set of dice to each “Stewards.”
 - C. **ASSIGN “STEWARDS:”** Match up each small group with a “Steward.”
6. **PASS LEADERSHIP:** Once the groups are coordinated, pass leadership off to the “Stewards” to walk through the Character and Cooperative creation process.

If your group completed the “Taking the Wheel” activity, use the same groups, roles, and scenarios. Consider this activity a continuation of that role play. Skip steps 3 through 7 if this is the case for you.

7. **MONITOR ACTIVITY:** As participants are creating their characters and cooperatives, move around the room to answer any questions that may arise.
8. **BRING THE GROUP BACK:** As participants finish up the character and cooperative creation process, bring their attention back to you.
9. **REFORM SMALL GROUPS:** Direct participants to regroup as they were before, and hand off leadership to the Facilitator in each group identified in the character and cooperative creation process.
10. **MONITOR ACTIVITY & PROVIDE TIMECHECKS:** Listen in and provide input if requested during the activity time. Additionally, provide “time checks” - let groups know how much time has passed and how much time remains to assist folks in following their agenda in order to meet the group’s goals.
11. **PREPARE FOR PRESENTATIONS:** Let folks know at this point that they will need to decide, using their agreed upon group process practices, how to present the following information to the larger group in 5 minutes or less: The following format is also included in the agenda handout:
 - If this is the group’s first role play with these scenarios, begin with:
 - ♦ Who are the people, generally, involved in your cooperative endeavor?
 - ♦ What kind of cooperative solution are you pursuing?
 - ♦ Anything exciting or notable to share?
 - Summary of “Structure” section
 - Summaries of two of the following sections: “Context,” “Strategy,” “Capital,” “Planning,” “Assessment”
12. **BRING GROUP BACK TOGETHER:** Check in with groups to determine group progress. Groups that haven’t finished should be encouraged to wrap up their conversation and to decide which agenda items or issues they will need to address in a future meeting
13. **LEAD PRESENTATIONS:** Lead the small groups through their presentations, providing time checks, as needed.
14. **DISCUSS:** To summarize the learning that occurred during this activity, engage participants through the following questions -

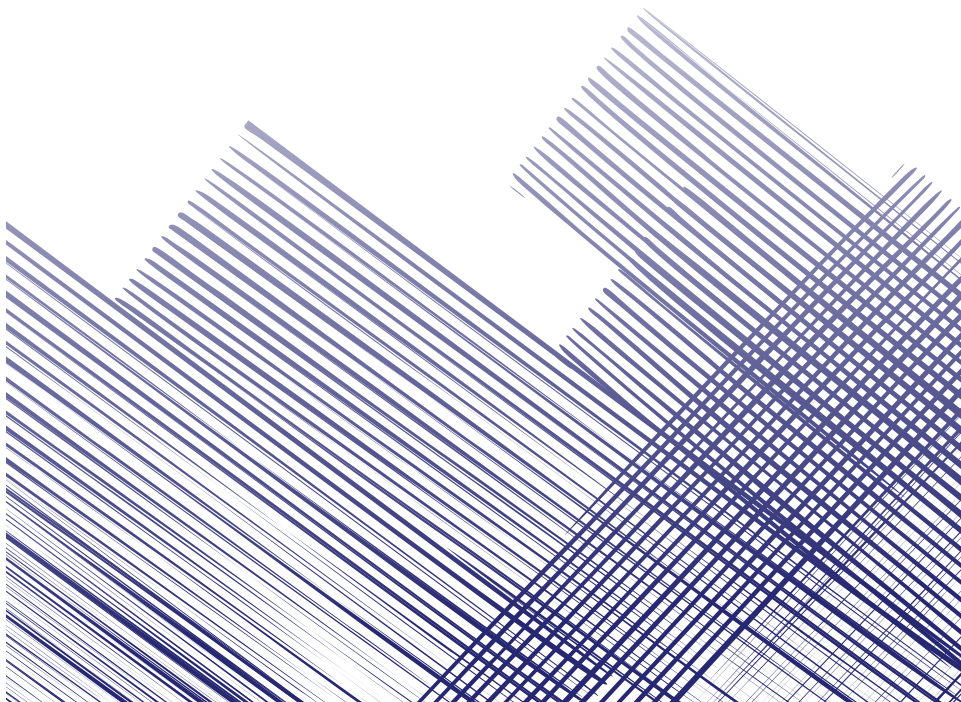
DESCRIBE: *What do you feel you accomplished via the planning process?*

REFLECT: *What aspects of the planning process were easy versus difficult?*

INTERPRET: *How might this planning process differ from “in real life” versions?*

APPLY: *Did you learn anything from the planning process that you could apply to a “real life” situation?*

15. CLOSE OUT ACTIVITY: If the discussion does not naturally close out the learning process, ask for any final comments or questions before bringing the activity to an end.



BRINGING IT ALL TOGETHER

OBJECTIVES

- Revisit and discuss completed learning to identify and attempt to fill in any gaps
- Provide a forum for making concluding comments or questions
- Affirm the groups contributions and efforts

TIME

- **15 minutes:** If only a brief check-out is needed, focus on one journal/discussion prompt, an oral evaluation, and thank you.
- **90 minutes:** When able to dedicate a considerable amount of time to closing, focus on doing as many journaling and discussion prompts you feel you need to fully conclude the learning process.

PREPARATION

SUPPLIES:

- Scrap Paper
- Pens & Pencils
- Post-it Notes

MATERIALS:

- Training Evaluation

CLOSING DISCUSSION

This section is meant to wrap-up the learning process by identifying and attempting to fill in any gaps in understanding the cooperative process and cooperation development. Explore potential opportunities for applying cooperative knowledge beyond the training time and space.

- 1. FRAME:** Share that this discussion time is intended to close-out the training process, generate questions, and identify gaps in understanding so the learning and application process can continue beyond the training.
- 2. JOURNAL - DISCUSSION PREP:** In preparation for a subsequent discussion, ask participants to write down responses to each of the prompts listed below. To provide some structure, present individual prompts in the listed order. Dedicate three to five minutes (watch to see as people finish before waiting for a whole five minutes or cutting the time off) for each section to give participants a chance to write down their thoughts.

- Describe one thing that you feel you learned.
- What, if anything, surprised you during your training experience?
 - *e.g. content, delivery method, your learning process, stories from peers, etc.*
- Any outstanding questions or quandries?
- How do you feel about cooperative entrepreneurship? Do you think it is something for you? Why or why not?

- 3. DISCUSS:** Ask for a few participants to share their responses to the prompts. Begin by focusing on one prompt at a time, but endeavor to get the conversation rolling organically. You will likely find that discussion flows more as you move into each subsequent prompt.
- 4. DISTRIBUTE POST-ITS:** As discussion wraps up, hand out two post-it notes or paper scraps for participants to use during the next discussion section.

1ST-NEXT-STEPS, NEEDS, & EVALS

To further support continuing learning outside of the training space - for trainees and trainers alike, this section walks people through identifying specific next steps for learning, see how participants can support one another in those next steps, and to share evaluations with the trainers of how the training was experienced.

1. **JOURNAL - SHARED NEXT STEPS & NEEDS:** Ask participants to write responses to the following questions on the two post-it notes. Instruct participants to stick their responses up on a wall as they finish them so participants can read each other's responses.

- What is your first next step to continue this learning process about cooperative entrepreneurship?
- What is something you might need or want in order to continue this learning process?

2. **DISCUSS NEXT-STEPS & NEEDS:** Invite participants to share what their next steps and needs are with the group, as well as to identify if they saw any other responses from other participants they felt were similar. Draw out any patterns, share any resources or opportunities you know of that could meet any stated needs, create space for other participants to also respond with resources or opportunities that could meet needs.
3. **DISTRIBUTE & COMPLETE WRITTEN EVALUATIONS:** As the conversation wraps up, distribute evaluation forms or additional post-it notes for folks to record their evaluation on the training in the following format -
 - » Plusses (+) - i.e. things they liked, things that worked for them, and
 - » Deltas (Δ) - i.e. things they would change so they would like or it would work better for them) on post-it notes.

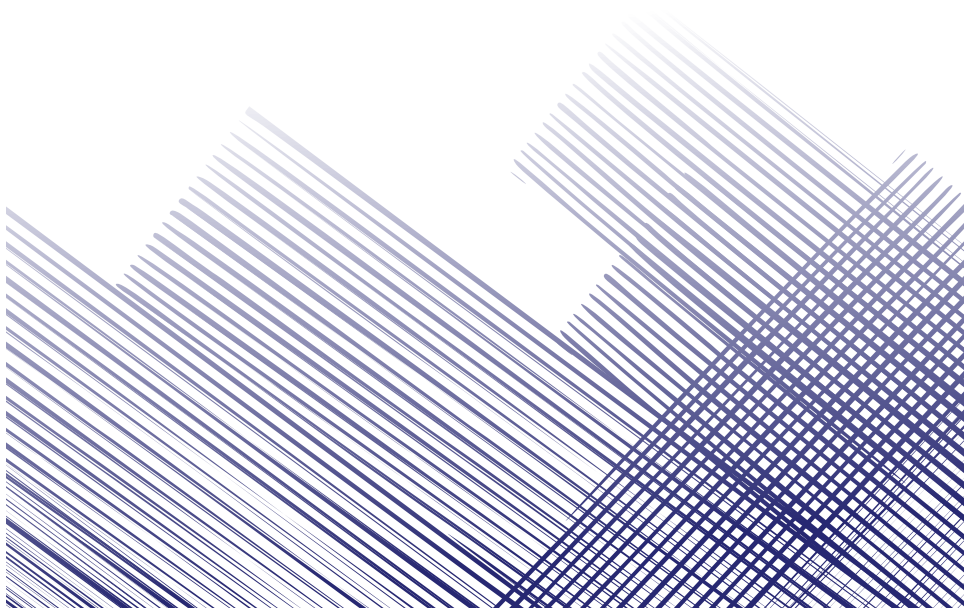
Be sure to share with the group why the evaluations are important and how they will be used.

- 4. CONDUCT BRIEF ORAL EVALUATION:** If appropriate to the group, having the opportunity for participants to transparently evaluate the training content and method can contribute to an empowering and equitable group dynamic. Asking for folks to share a few of the things that they consider plusses or deltas - endeavor to close out the oral evaluation with some plusses, to keep the mood up as people disperse.
- 5. ARRANGE FOR COLLECTION OF EVALUATIONS:** Explain where the completed evaluation forms can be gathered for pick-up. People may be more forthcoming in their evaluations knowing there is an extra layer of anonymity provided by leaving the evaluations somewhere, instead of handing it directly to you.

APPRECIATIONS & OPPORTUNITIES

This section seeks to end the training on a positive note so as to motivate participants to actually carry out the next steps they sketched out in the previous section. Additionally, it is the time and space to provide real opportunities for further engagement that are not self-directed.

- 1. LEAD APPRECIATION SHARING PROCESS:** Provide an opportunity for the group to share affirming statements about each other - e.g. something someone said or did they appreciated. These can be shared orally or written on individual post-its and given to the people they reference.
- 2. THANK YOU & FINAL FEEDBACK:** As the affirmation or evaluation processes wrap-up, thank everyone for coming and ask if there are any lingering comments or questions.
- 3. SHARE OPPORTUNITIES:** Direct attention to any additional opportunities available to participants - websites you think they would value, upcoming trainings or events in a community of relevance, and/or share if you are accessible for continued conversation and learning (e.g. via email, phone, listserv)
 - A. LISTSERV:** Using the emails from the sign-up list, you may opt to create a listserv to facilitate continued learning and connection beyond the training - if you choose to do this, let folks know now and how they can opt out.
- 4. CLOSING:** Close out the session and share that you will be available for the next few minutes if any participants would like to talk one-on-one.



ABOUT THE AUTHOR

Northcountry Cooperative Foundation

Traveling Cooperative Institute



The Youth TCI is part of the Kris Olsen Traveling Cooperative Institute programming series that has served the Upper Midwest for over a decade as part of the work of the Northcountry Cooperative Foundation (NCF). The mission of the NCF is: “helping transform lives and communities through cooperative enterprise.” NCF, a 501(c)3 nonprofit corporation, helps develop community-owned and democratically governed enterprises through training, development assistance, research, education and specially designed projects. NCF acts with a clear and common purpose, teaches and practices shared leadership and management, and seeks power for those who have little of it.

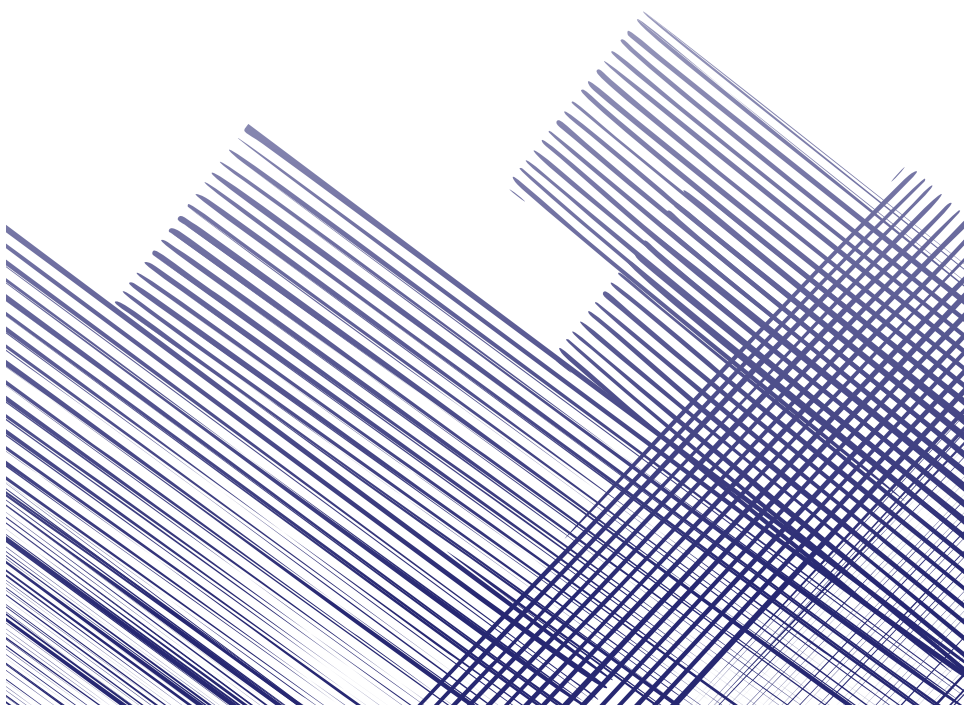
Emily M Lippold Cheney

Cooperative Organizer

As a cooperative youth organizer, Emily M Lippold Cheney (EMLC) focuses her work on strengthening the engagement of youth in the cooperative movement through the provision of leadership development opportunities and the creation accessible cooperative development tools.



Her leadership role in the cooperative movement began with the founding of a community housing cooperative, Bloomington Cooperative Living, while a college student. Subsequently, she managed and developed other housing cooperatives locally and nationally. Through her work with the North American Students of Cooperation (NASCO) - a binational membership association of common equity housing cooperatives, she became involved in national and international youth organizing. That involvement led to her role in the founding of the USA Cooperative Youth Council (USACYC) - a national cross-sector cooperative organization of youth and their allies that provides experiential learning opportunities using a peer-to-peer model. In complement to this work, she led the evolution of NCF's TCI program to focus on youth and students. EMLC also cooperates across borders in the international cooperative movement. She is a primary author of the Guidance Note to the 6th Cooperative Principle stewarded by the International Cooperative Alliance (ICA), as well as an At-Large member of the ICA Youth Network Executive Committee.



APPENDIX

All Items included in the Appendix are labeled as one of the following:

- **TOOL:** Items for use by only facilitators
- **HANDOUT:** For distribution to participants to review as part of an activity
- **WORKSHEET:** For distribution to participants to complete as part of an activity

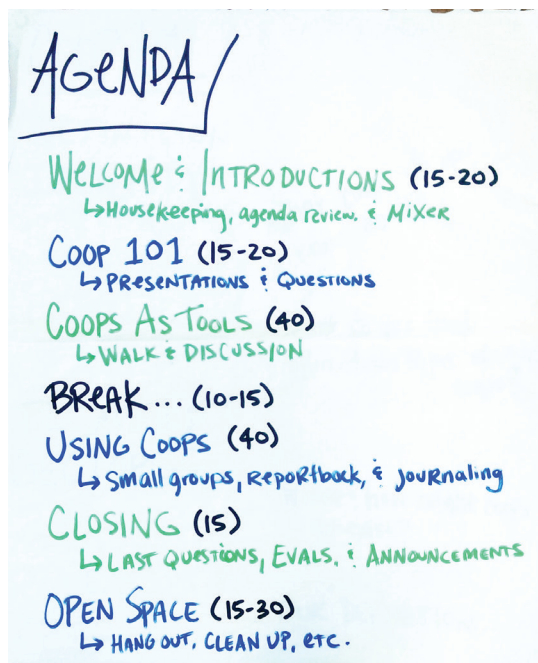
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AGENDAS

TOOL

Sample schedules provided below are targeted for traveling educators requiring a seasonal schedule for instructors leading a semester long class of weekly meetings, and for a group of people gathering for a single weekend retreat. The curriculum can be broken up in many other ways that suit your unique goals and time requirements. Single curriculum elements can also be used as stand-alone workshops.

Post a simple agenda in the space for participants to refer to during each of your trainings. A simple but informative agenda includes a list of the items to be covered (e.g. "Coop 101"), each item's format (e.g. Presentation), and the planned time (e.g. 15-20 minutes). The sample agendas provided below target important details for inclusion.



BREAKS

Providing participants some personal time away from the curriculum and group experience typically ranges from nice to necessary. Suggestions for timing breaks are included at the beginning of each agenda in lieu of writing them in the agenda. You may also ask for group input on the need and the timing for break/s when the agenda is first shared.

SEASONAL SCHEDULE

These agendas were created for traveling educators in agricultural regions where schedules need to navigate planting and harvest times. An initial part of the curriculum is presented in a three hour session during the Summer with an intensive, full day session during the Winter. Due to the time that elapses between sessions and the reality that some participants will only attend one session, a Cooperation 101 refresher is included in the second session. Each section is possible in the stated time by picking only one activity from within that section to present.

SUMMER WORKSHOP (3 HOURS)

Have the group break one or two times throughout this exercise. If choosing to use one break, a 10-15 minutes break is recommended between Step 3 and Step 4.

1. Welcome & Introduction (15-20 minutes)
2. Cooperation 101 (15-20)
3. Coops As Tools (40)
4. Using Coops (40)
5. Bringing it All Together (15)
6. Open Space/Hang-Out (~30)

WINTER WORKSHOP (8 HOURS)

A one hour meal break is essential for this exercise. Breaks are recommended, at least, after Steps 3 or 5 or before Step 8.

1. Welcome & Introduction (15-30)
2. Cooperation 101 Review (15)
3. Demystifying Development (45)
4. What's Your Process? (45)
5. Organizing Your People (75)
6. Storytelling (15-30): Sharing personal cooperative development visions and plans
7. What's the Plan? (120)
8. Bringing it All Together (15)
9. Cooperative Development Workshop (Optional, 60)
 - Those interested in workshopping their personal cooperative development visions are encouraged to stay to discuss their efforts with the educator with the goal of obtaining relevant resources and beginning a mentoring relationship with the educator.

SEMESTER SCHEDULE

The semester curriculum includes eleven individual sessions ranging from one and one-half to two hour classes. These classes can also be incorporated into a weekly format outside of a formal institution of education (e.g. weekly community study group). Some of the discussion classes can be expanded to explore assigned readings or multi-media resources instead of discussing the previous class activity.

1. Beginning the Work

◀ Video Screening: "Cooperative (n.)" (<http://www.youtube.com/watch?v=VmgYv3K3gMY>)

2. Cooperation 101

3. Coops As Tools

4. Using Coops

◀ Outside Class Work -

- ♦ Journaling Reflection: How could a cooperative impact your life or community?

5. Discussion Section

◀ Topics: "Using Coops" Journaling Reflection & Reading

6. Demystifying Development

7. What's Your Process?

8. Organizing Your People

9. Discussion Section

◀ Topic: Review of "Organizing Your People" OR Outside Class Reading

10. What's the Plan?

11. Discussion Section

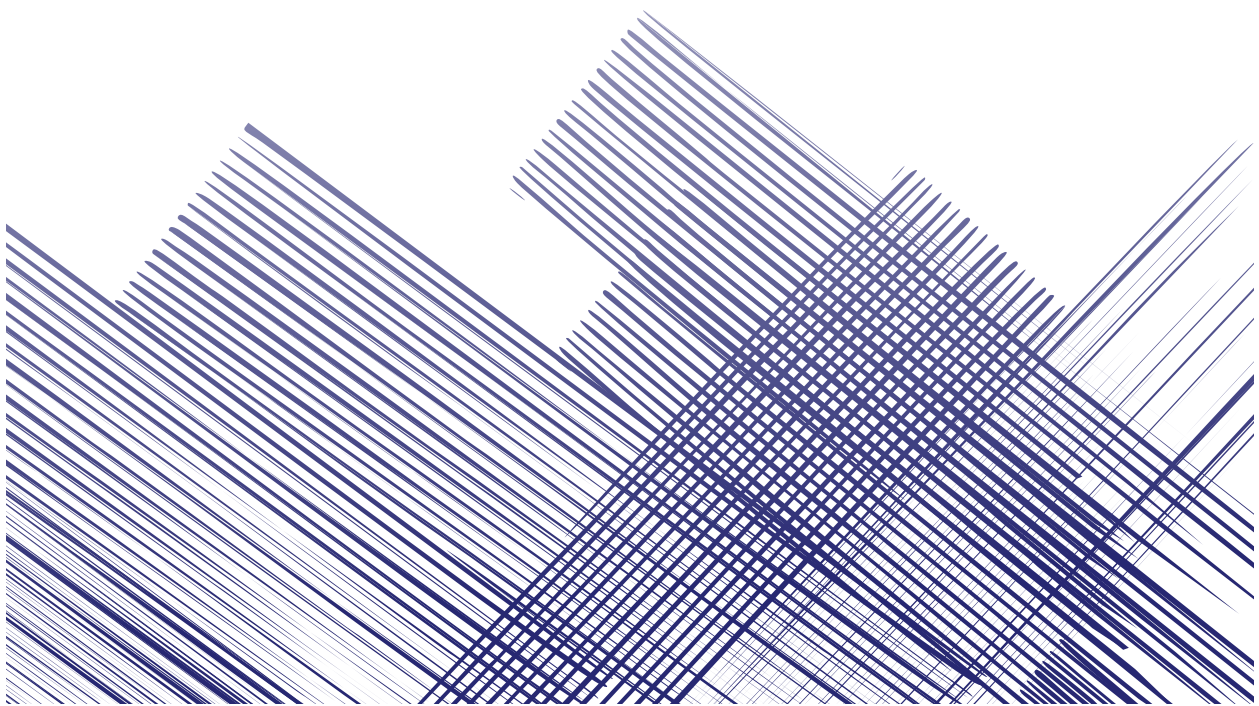
◀ Topic: Review of "Writing Your Plan" OR Outside Class Reading

12. Bringing It All Together

RETREAT SCHEDULE

Each session averages ninety minutes. Combining two 90 minutes sessions with a 30 minute break between mealtimes is recommended. Without additions, this curriculum satisfies a weekend retreat schedule - though, depending on the group's size and background knowledge, some activities may need to be abbreviated. Extra readings or activities will optimally require a commitment of three full days. Be sure to plan additional check-ins and breaks throughout the schedule to maintain energy and engagement - see "Welcome & Introduction" for more facilitation game resources.

1. Beginning the Work + Cooperation 101
 - ◀ Video Screening: "Cooperative (n.)" (s.coop/cooptedx)
2. Coops As Tools
3. Using Coops
4. Demystifying Development
5. What's Your Process?
6. Organizing Your People
7. What's the Plan?
8. Bringing It All Together



ACCESSIBILITY CHECKLIST

TOOL

OVERVIEW

The following checklist tool for assessing accessibility of a training is by no means exhaustive. It was created by trainers within the Northcountry Cooperative Foundation's Traveling Cooperative Institute program after looking for a tool of this type and not finding one that satisfied our needs. The checklist invites you to consider the accessibility of the physical space, the logistics (e.g. timing, promotion) of the event, the content type and delivery format, as well as several miscellaneous but still important elements (e.g. food and water provision).

SPACE

- **LIGHT:** Ensure there is natural light in the room (e.g. no basements!); if natural light isn't possible, make sure time to go into natural light is scheduled for trainings over one hour
- **BATHROOMS:** Bathroom and bathing facilities need to be gender inclusive - either create gender neutral bathrooms or some mixture of other inclusive and safe arrangements (e.g. 1 Male & 1 Women/Trans/Femme bathroom) ; You may need to make your own signs to post over existing bathroom signs (i.e. DIY that ish)
- **SEATING:** Endeavor to provide comfortable or a diversity of seating options (i.e. folding chairs such for long periods of time)
- **TEMPERATURE:** Try to pick spaces in which you have control over the temperature - check in with people about their comfort
- **NOISE:** Spaces that are echo-y or can't block outside noise in them are best avoided
- **MOBILITY:** Pick a space that is accessible for those with limited mobility (e.g. wheelchair users); Indicate mobility access details in promotion for the training
- **SIZE:** Pick a room that has enough space for the group to move within and also for some diversity in where attention is focused and where work happens (i.e. avoid a single point of focus, keep energy and focus moving around the room)

LOGISTICS

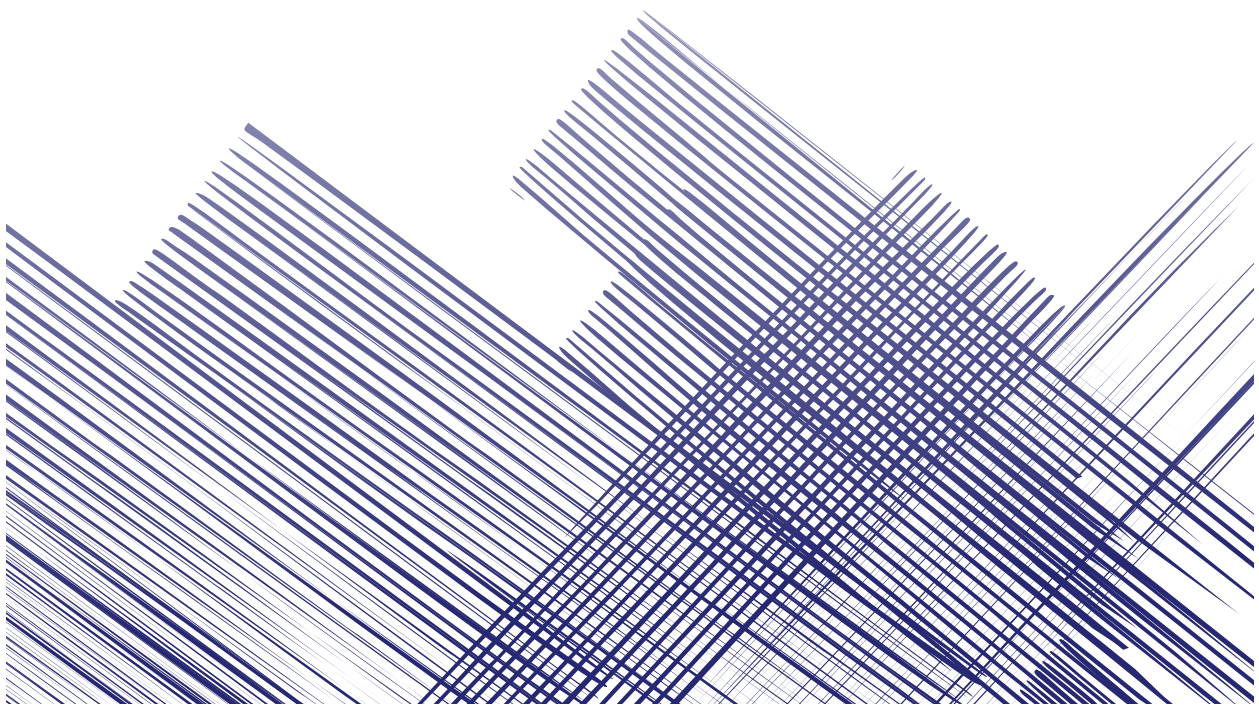
- **TIMING:** Every hour of the day is during someone's work shift, be mindful of whose workshifts you are conflicting with when scheduling your event as they likely can't attend
 - Check in with your community calendar so you don't conflict with other important events
- **COST:** If possible, make your training costs sliding scale to ensure that cost is not a prohibitive factor for anyone
 - If the training requires travel for some folks, endeavor to provide travel stipends and mention the stipends clearly in all training promotion
- **PROMOTION:** Be mindful of where you promote the event, what languages you use, etc.
- **TRANSIT:** Try to pick a location accessible via public transit and with parking options for cars and bikes
- **DIRECTIONS:** Publicize transit information when you promote the training; Make signs at the training location to direct people to the right room

CONTENT

- **BREAKS:** Ensure you take breaks at least every 90 minutes; Breaks should be long enough for participants to use the bathroom, stretch, make a call, etc.; Endeavor to pick a location that has space outside of it in which breaks can be taken; Don't co-opt breaks because content didn't get covered in the scheduled time (i.e. Breaks are necessary for learning!)
- **ANTI-OPPRESSIVE FRAMEWORK:** Operate from an anti-oppressive framework as a trainer - educate yourself on what this means!
 - If this is true for your location, name that you are on land stolen from indigenous people (research the exact peoples)
 - When providing guidelines for participation, be explicit around why some guidelines are necessary (e.g. "Make Space & Take Space" is necessary because...)
 - Offer "Challenge by Choice" (i.e. allow folks to choose to participate or not in each activity)
 - Have boundaries about what training you can offer given the space and time restrictions - say "no" to doing a training if the context for it won't be accessible or safe
- **IDENTITY:** Provide an opportunity for participants to share whatever about their identity they feel is important to fully participate; This is a vital space to create for folks to share their Preferred Gender Pronouns - encourage that sharing by modeling it as the trainer
- **NEEDS:** Provide an opportunity for participants to share whatever it is they may need to fully participate (e.g. someone has to leave early, someone has difficulty hearing)
- **MOVEMENT:** Incorporate movement of some kind (for those who are able) to keep bodies open to learning
- **LEARNING STYLES:** Try to provide visuals for visual learnings, integrate play to aid in application of the material
- **CONCLUSION:** While many learning processes and conversations are ongoing, provide a clear ending activity or go-around to close out a training so folks leave with some sense of accomplishment

MISC.

- **TECH:** Make sure you have your technology figured out ahead of time, don't waste training time fiddling with cords, internet, etc.; Don't mess with your personal phone or other technology during training
- **FOOD:** Providing snacks for trainings over 90 minutes; Ensure a multitude of food options are available (e.g. vegetarian, gluten free); Share in promotion if food is provided or not
- **WATER:** Make some potable water (and cups) available throughout the training or event; Beyond cool water, hot water for tea/coffee is ideal; Encourage participants to bring water bottles
- **LANGUAGE:** Be clear about what languages you are able to offer the training in, if there is interpretation, and if you welcome simultaneous interpretation (if an attendee wants to bring their own interpreter)
- **VISUALS:** Are poster and other visuals large enough to be seen by everyone in the training space



COOPERATIVE IDENTITY

HANDOUT

Cooperatives are defined by a **Statement**, a set of seven **Principles**, and a set of ten **Values** - the sum of which is referred to as the “**Cooperative Identity**.” The Cooperative Identity is stewarded by the **International Cooperative Alliance (ICA)**. The ICA was created in 1895 to unite, represent, and serve cooperatives worldwide.



STATEMENT

A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social, and/or cultural needs and/or aspirations through a jointly-owned and democratically-controlled enterprise.

PRINCIPLES

1. Voluntary & Open Membership: Cooperatives 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.
2. Democratic Member Control: Cooperatives are democratic organizations controlled by their members, who actively participate in setting their policies and making decisions. Members have equal voting rights (one member, one vote).
3. Member Economic Participation: Members contribute equitably to, and democratically control, the capital of their cooperative.
4. Autonomy & Independence: Cooperatives are autonomous, self-help organizations controlled by their members.
5. Education, Training, & Information: Cooperatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their cooperatives. They inform the general public about the nature and benefits of cooperation.
6. Cooperation Among Cooperatives: Cooperatives both serve their members most effectively and strengthen the cooperative movement by working with each other whenever possible.
7. Concern for Community: Cooperatives work for the sustainable development of their communities through policies approved by their members.

VALUES

- | | | |
|-----------------------|--------------|-------------------------|
| → Self-help | → Equality | → Openness |
| → Self-responsibility | → Equity | → Social-responsibility |
| → Democracy | → Solidarity | → Caring for Others |
| → Democracy | → Honesty | |

OWN, CONTROL, & BENEFIT

WORKSHEET

Who owns, controls, and benefits from the different models of business and organization most prevalent today? The “profit paradigm” (including “for-profit” and “non-profit” entities) encompasses the vast majority of enterprises in the United States.

	FOR PROFIT	NON PROFIT	COOPERATIVE
Example Organization			
OWN			
CONTROL			
BENEFIT			

Examples of familiar US businesses and organizations:

- **FOR PROFIT:** Amazon, Wal-Mart, Your local bank
- **NON PROFIT:** World Wildlife Foundation, Red Cross, UNICEF
- **MUTUAL:** REI, Ocean Spray, Your local credit union

COOPERATIVE STORIES

TOOL



SAMPLE STORIES PROVIDED:

- Rural Electrics (Consumer, Utility)
- Friendly City (Consumer, Food)
- CHS, Inc (Producer, Agriculture)
- Freedom Quilting Bee (Artisan, Multi-Purpose)
- TESA (Worker, Education,
- New Era (Worker, Manufacturing)

TO CREATE YOUR OWN STORIES:

- Write one to three paragraphs about the cooperative's start-up story. Be sure to include what the coop is, who started it, why they started it, and some additional interesting information.
 - When including this key information that is drawn upon in the accompanying workshop, don't make it too explicit in the narrative so participants can practice their reading comprehension skills through this activity.
- Background stories for hundreds of cooperatives can be found at stories.coop

RURAL ELECTRICS

INDUSTRY: Utility

MEMBERSHIP: Consumers – households & businesses

TIME PERIOD: 1930s – Present Day

In the mid-1930s, nine out of ten rural homes were without electricity. The unavailability of electricity in rural areas kept economies entirely dependent on agriculture. Factories and businesses preferred to locate in cities where electric power was easily acquired. For many years, investor-owned power companies ignored rural areas believing there would be insufficient revenue to justify the cost of providing service.

In 1935, President Roosevelt signed an Executive Order establishing the Rural Electrification Administration, which in turn passed legislation creating the infrastructure for a lending program that was used by rural residents to create their own electric cooperatives. These cooperatives built and maintained power lines. Subsequently, the amount of rural farms with electricity increased from 10% to 90% between the late 1930s and 1953.

Today, about 99 percent of the nation's farms have electric service, and the majority of that service is provided by cooperatives. Electric cooperatives serve 12% of the nation's population, yet own 42% of America's distribution lines. Currently, over 90% of electric cooperatives include renewable generation in their portfolios.

IN 2015, US Electric Coops:

- Served an estimated 42 million people in 47 states
- Served over 18.5 million businesses, homes, schools, churches, farms, etc.
- Were in 2,500 of the 3,141 counties in the U.S.
- Owned assets worth \$140 billion
- Owned and maintained 2.5 million miles of the nation's electric distribution lines
- Employed 70,000 people in the U.S.
- Paid \$1.4 billion in state and local taxes

QUESTIONS:

1. What do you think would have happened if these rural residents didn't form their own cooperatives?
2. If you were a member of an average rural family in the 1930s & 1940s, how would these cooperatives have impacted your daily life?
3. Why do you think these all remain member-owned cooperatives more than 50 years after they were established?
4. How do you think these utility businesses differ from conventional utility businesses in terms of price and service?

FRIENDLY CITY

INDUSTRY: Retail Food

MEMBERSHIP: Consumers

TIME PERIOD: 2006 - Present Day

In 2005, a local worker owned restaurant called the “Little Grill” in Harrisburg, Virginia created the “Little Store,” which sold local foods and organic products. The Little Store struggled for reasons including poor visibility/marketing, a bad location, and a narrow selection of products. It closed in less than a year. However, the community still desired the products offered by the Little Store, so a handful of the customers began a new process to develop a cooperatively owned grocery store - this time, to be owned by the consumers (rather than the workers).

Together, these consumers were able to access sufficient resources to hire a development consultant and an outreach coordinator to lead the work. The enlistment of additional staff, a lawyer, and a dedicated Founding Team, allowed their cooperative plan to be formalized within a single year.

Within two years, 450 people agreed to become members of this planned cooperative. Most member recruitment was done via word of mouth. In 2009, the cooperative secured a loan for nearly \$500,000 to build a store.

By the end of 2010, there were over 1,000 identified members and \$1,000,000 in loans provided directly by members. Due to their success in gathering people and money, even more loan and grant dollars became available. In total, the group raised close to \$1.5 million dollars without an actual storefront! They eventually opened their doors in July of 2011 - six years after the original “Little Store” opened, and roughly four years after the planning began for a new version of the grocery store.

QUESTIONS:

1. In what ways was the development process different when it was led by consumers versus when it was led by workers?
 - » How about the treatment of the two projects by lenders and other potential stakeholders?
2. Why do you think over 1,000 people were willing to risk their money in this business venture ?
3. What do you think about the reality that the group having money is what attracted more money to the project?
 - » What does that mean for communities or projects without lots of initial money that can be “self-funded?”
4. How do you feel about their decision to hire professional folks to help them create their cooperative?

CHS, INCORPORATED

INDUSTRY: Agriculture

MEMBERSHIP: Producer

TIME PERIOD: 1931 – Present Day

In the late 19th century, farmers in the United States were being exploited by middlemen to which the farmers were forced to sell their crops, and the railroad barons who had a monopoly on getting the crops to the marketplace. As a result, they were unable to provide themselves and their families a stable income. In the early 20th century, many farmers undertook political organizing to improve their situations through legislative initiatives. However, this was not enough. Farmers continued to face exploitation, this time at the hands of financial institutions. Bankers often foreclosed on the homes of farm families which missed a payment on a loan because the harvest didn't come in on time. The bankers refused to acknowledge the variability of the timing and yield of the harvest, which greatly impacted farmer families' finances.

This bankrupted many families and pushed them out of farming altogether. Farmers needed more stable incomes and access to marketplaces to sell their crops without middlemen. Using the lines of communications and communities built through their earlier political organizing, farmers started to economically organize themselves into producer cooperatives (farmers = producers). Through these cooperatives, farmers could market and sell their crops in bulk on the market and be assured both a better price in the marketplace and a more consistent income stream. Over time, these cooperatives experienced great success and many have merged to achieve an immense economic scale and level of political influence.

CHS Incorporated is a large cooperative that has many of these smaller farmer-owned cooperatives as its members (i.e. a cooperative of cooperatives). Founded in 1931, CHS is now a Fortune 100 company and the largest cooperative (in terms of assets) in the United States. Over the years, CHS has expanded its activities to several sectors including, but not limited to, food processing, wholesale food, farm supply, retail fuel, fuel processing, and financial services. The cooperative has over 14 billion USD in assets and uses millions of dollars of its annual net revenue to support cooperative education, promote agricultural safety, and strengthen rural communities.

QUESTIONS:

1. Are there other aspects of agricultural work that you think could use the cooperative model?
2. Why do you think CHS has been so effective?
3. Do you think cooperatives need to grow as large as CHS to be considered successful?
4. Is there anything to learn or observe about techniques for cooperative development from this era of the US cooperative movement's growth?

FREEDOM QUILTING BEE

INDUSTRY: Multi-Purpose

MEMBERSHIP: Workers/artisans, mostly women

TIME PERIOD: 1966 – 2012

The Freedom Quilting Bee (or “the Bee”) was initially a handicraft cooperative established in Alabama in 1966. It was the brainchild of female family members of sharecropping farmers. Sharecropping farmers rented their farmland in exchange for a small share of the crops they grew on that land. Such an arrangement makes their livelihoods incredibly vulnerable and subject to the whims of the landowner. At this time and in this region, all sharecroppers were poor, many were black, and many were former slaves. If their rent was raised or the land-owner decided to no longer rent to them, they would have no way to earn an income. The Bee was founded at a time when many black sharecroppers were losing their rented land, because the land-owners disapproved of the farmers’ participation in activities supporting the Civil Rights Movement.

To provide income, women began selling quilts through the Bee to offset the loss of land and income from farming. The Bee’s products were in such demand that a group of women in New York opened a store called the “Bear Paw” dedicated to selling the Bee’s products, and their work has been displayed at the Smithsonian Institute. The Bee was credited with being responsible for the revival of American quilting in the 1960s and 1970s.

In 1968, the success of the quilt sales enabled the Bee to buy 23 acres of land used to build a sewing plant (which still exists today) and homes for sharecropping families who were evicted from their land. From 1970 to the mid-1990s, the cooperative leased part of one building for a day-care center that served the entire community. By 1992, the cooperative was the largest employer in town.

However, beginning in the late 1990s, the market for quilts produced in the US significantly declined due to insufficient labor protections and poor wage standards in other countries where quilts could then be made more “cheaply.” This competition made it impossible for the Bee to remain competitive in the quilt market. In response, the Bee adapted and diversified its product offerings to include canvas bags. The Bee ultimately closed in 2012.

QUESTIONS:

1. Can you think of ways in which people in our modern day communities experience a high degree of interdependence (e.g. how the actions of a few landowners would impact multiple families)?
2. What other businesses do you know of that might choose to work together like the quilters did with the sharecroppers and daycare providers? Why or why not?
3. Most of the members of worker cooperatives in the United States as of 2016 were women of color – does the story of the Bee suggest any reasons for why this is the case?

TESA

INDUSTRY: Education

MEMBERSHIP: Worker

TIME PERIOD: 2010 - Present Day

TESA creates educational resources for multiple and varied social and economic change issues. The worker cooperative produces products for sale (e.g. board games and curricula) and provides educational services to other organizations. TESA creates educational resources that both address many issues not taught in schools and employ teaching methods not used in most schools.

The Toolbox for Education and Social Action (TESA), a worker-cooperative of educators, began as a college project. Following graduation, the student initiating the project began working to establish TESA as a formal organization. The work eventually became a full time job for that student, and - about a year and a half later, a second person joined TESA in a paid staff role, which began the organization's transition from a project to a worker-owned cooperative.

In its short history, TESA has grown to a handful of worker-owners. The cooperative is still developing and has weathered some difficult financial times. Some of its struggles are explained by how education work is greatly undervalued. This has forced TESA to be creative in the types of projects it embraces and the ways it raises money to support its initiatives. To fund the creation of its flagship education product, CoOpoly: The Game of Cooperatives," TESA used a crowdfunding campaign on Kickstarter. TESA also seeks support from grants and foundations for its targeted projects. Through these creative approaches and varied mediums, TESA has been able to provide compensation for its worker-owners to allow them to continue to create powerful educational resources for changing the world.

QUESTIONS:

1. How is the founding of TESA similar or different to what you think of when you hear the word "entrepreneurship?"
2. Why do you think they chose to pursue educational objectives in a cooperative environment instead of working at a school, university, or existing institution?
3. Why do you think they opted for a worker-cooperative model?
4. What do you think about their difficulty in funding education-related initiatives?

NEW ERA WINDOWS

INDUSTRY: Manufacturing

MEMBERSHIP: Worker

TIME PERIOD: 2010 – Present Day

In 2008, after many decades of successful operation, Republic Windows and Doors shut down its operations as a result of bankruptcy. This news was surprising to many, as the business appeared profitable – its owners had even opened additional windows factories in recent years elsewhere in the same city.

Ultimately, it was revealed that the owners were engaged in fraudulent behavior and were being sued by banks over outstanding debts. It became apparent that the workers were not losing their jobs because they weren't doing good work or because the business couldn't provide itself to be viable – instead, it was because the owners of the business acted unethically and without the interests of the workers and other stakeholders in mind.

The workers were told that their jobs would be terminated immediately and that they would not receive the backpay or severance that was contractually obligated to them. Strongly supported by the local community, the workers occupied the factory in protest. Through the occupation, the workers were successful in getting the backpay and severance owed to them. Soon after the successful protest, a new company purchased and reopened a portion of the factory, which allowed some workers to keep their jobs. Unfortunately, this business struggled and also faced foreclosure. The remaining workers found themselves losers in a financial game they did not control.

This proved to be the last straw. The workers decided it was imperative for them to be in charge of their own employment and livelihood. They began to plan to start a new window manufacturing business they would collectively own. They called the business venture New Era as a signal and inspiration to others to participate in a new era of American workers owning their own industrial jobs. They use the following statement to guide their work: “Everyone can participate in building the economy we all want, and no one should be treated as temporary or just raw material for someone else’s business.”

QUESTIONS:

1. What do you think would have happened in the lives of these workers if they had not taken control and ownership of the business?
2. What impact does a business that employs a large number of people have on a town when it shuts down and lays off some or all of its workers?
3. What challenges do you think they faced in the transition to a worker cooperative?

INTER-COOPERATIVE COUNCIL

INDUSTRY: Housing

MEMBERSHIP: Residents, students

TIME PERIOD: 1932 – Present Day

In 1932, in response to the harsh economic times imposed by the Great Depression and resulting difficulty in finding affordable housing, male members of a student group at the University of Michigan founded the Michigan Socialist House. In return for four to five hours of work and two dollars every week, each of the 18 founding members received room, board, barber services, canning assistance, and laundry service. The success of the Michigan Socialist House fueled other cooperative endeavors, the most notable being Michigan Wolverine Eating Cooperative. The dining cooperative served as a common ground for many student groups - specifically, the Student Christian Association, the Wolverine Eating Cooperative introduced the idea of housing cooperatives to many within the religious community.

In 1936, a group of male students from the religious community chose to move into a rented house that they named the Student Cooperative House. Since the University did not allow for males and females to cohabitate, only men lived at the Student Cooperative House; a group of women later rented and ran their own Girls' Cooperative House.

In 1937, the four existing student cooperatives joined together to form the Campus Cooperative Council. This organization later became known as the Inter-Cooperative Council (ICC) and was formerly ratified and recognized by the University and all its member cooperatives in 1939. The increased economy, efficiency, and publicity gained through the establishment of the Inter-Cooperative Council facilitated the establishment of many more student cooperatives on the University of Michigan campus over the next several decades.

As of 2016, the ICC owns 19 houses, which range in size from about 12 to 85 members of a diversity of genders. Houses manage their finances, do minor maintenance, prepare house-wide meals, and coordinate with all cooperative housing units on campus. House meetings, which are held once or twice a month, provide a forum for open communication and, if necessary, conflict resolution. Members vote on such issues as how much to spend on food, how many meat meals to serve per week, which newspapers to order, and when to schedule the next party.

QUESTIONS:

1. How would you describe the growth process that brought about the first four student cooperatives? Have you seen this kind of growth happen in other situations?
2. What skills do you think a member develops through the student housing cooperative?
3. Why do you think the ICC still exists today - in a similar structure, name, etc - almost a century after its inception, despite the membership in its houses changing dramatically each year?

COOPERATIVE NEWS

WORKSHEET

1. **Read** through the scenario provided to you for the activity.
2. **Envision yourselves as the protagonists** in the scenario.
3. **Brainstorm potential cooperative solutions** to the issue or need presented.
4. **Select one of the potential solutions** with which to **answer the following discussion questions and briefly record your responses:**
 - A. Who are the stakeholders? Which of those stakeholders are members? Why?
 - B. What is the good or service offered cooperatively?
 - C. What benefit(s) does this cooperative offer to its members?
 - D. How is this cooperative likely to change the life of individual members?
 - E. How is this cooperative likely to change the larger community?
6. **Shift your perspective** from that of a cooperative founder to that of a journalist in the community. Imagine that the cooperative is planning to begin operations in one month.
7. **Design a “frontpage” of an online or paper media outlet** reporting on the upcoming start of operations - create it on a piece of paper. Use the components presented in the sidebar on the right of this page, as well as anything else you can imagine.

FRONTPAGE COMPONENTS:

- ◀ **HEADLINE** – A few words, often not a complete sentence, that serves as the title to the main front page article about your cooperative scenario.
- ◀ **SIDEBARS** – These are sub-statements that are more detailed than the headline. They may highlight some of the technical and specific aspects of your discussion and subsequent plan, e.g. The new cooperative has already signed up 50 members!
- ◀ **QUOTES** – These are testimonials about the accomplishment or difficulty from interested parties – people quoted can be direct stakeholders (e.g. a cooperative founder) or folks who have more distant relationships (e.g. small business owner).
- ◀ **OTHER** – Anything else you can think of that makes sense on a front page, e.g. related articles with their own headlines, pictures, the weather, community announcements.

COOP NEWS SCENARIOS

TOOL

The Cooperative News Scenarios are simple descriptions of a problem or situation to which myriad cooperative solutions could be applied. Provided here are two sample scenarios - one using a real agricultural worker cooperative called the Hoedads (hoedadsonline.com) as inspiration and one using a fantastical premise with a community of kittens and unicorns. You can cut out or copy these for use in your group or develop your own.

If creating your own scenarios, keep in mind that they should be no more than 200 words, concise and simple, but not "too easy" (i.e. prescriptive).

REFORESTATION

You are a seasonal fieldworker forced to move to different farms and areas according to the plantings and harvesting cycles. Each time you transition to a new farm, there is a considerable amount of paperwork and other administrative tasks that have to be done before the landowner can allow you to start work and be paid as an employee. Sometimes you will arrive for work, and the farmer will not have any work left for you to do. Landowners will often take advantage of mobile workers' needs for an income by offering a less than fair wage. Finding and securing work as an individual worker is continually tough and inefficient - as a result, your income is unstable and you are unable to easily arrange for a visit from your family as you are never sure where you may be one month to the next. Most seasonal fieldworkers experience the same challenges.

CLOUDFOREST

You are a group of cuddly kitten friends who live in Cloudforest, land mostly populated by unicorns. Kittens and unicorns came to live together in Cloudforest because they were both run out of their previous home regions in the last Goblin Raids - the unicorns came to the Cloudforest 44 years before the kittens arrived and used magic to develop their homes, roads, etc. While kittens have now lived in Cloudforest for 11 years, the town is still mostly developed to suit and serve unicorns - i.e. eating tables are troughs anywhere from three to five feet from the ground, grocery stores sell mostly unicorn staples (marshmallows, carrots, tins of buttercream icing). Kittens are unable to build their own infrastructure, as they do not have opposable thumbs and their special kind of magic doesn't work to build things (unlike the unicorn magic). While kittens have many other skills and assets, the situation for kittens in Cloudforest remains poor.

COOPERATIVE DEVELOPMENT CONTINUUM

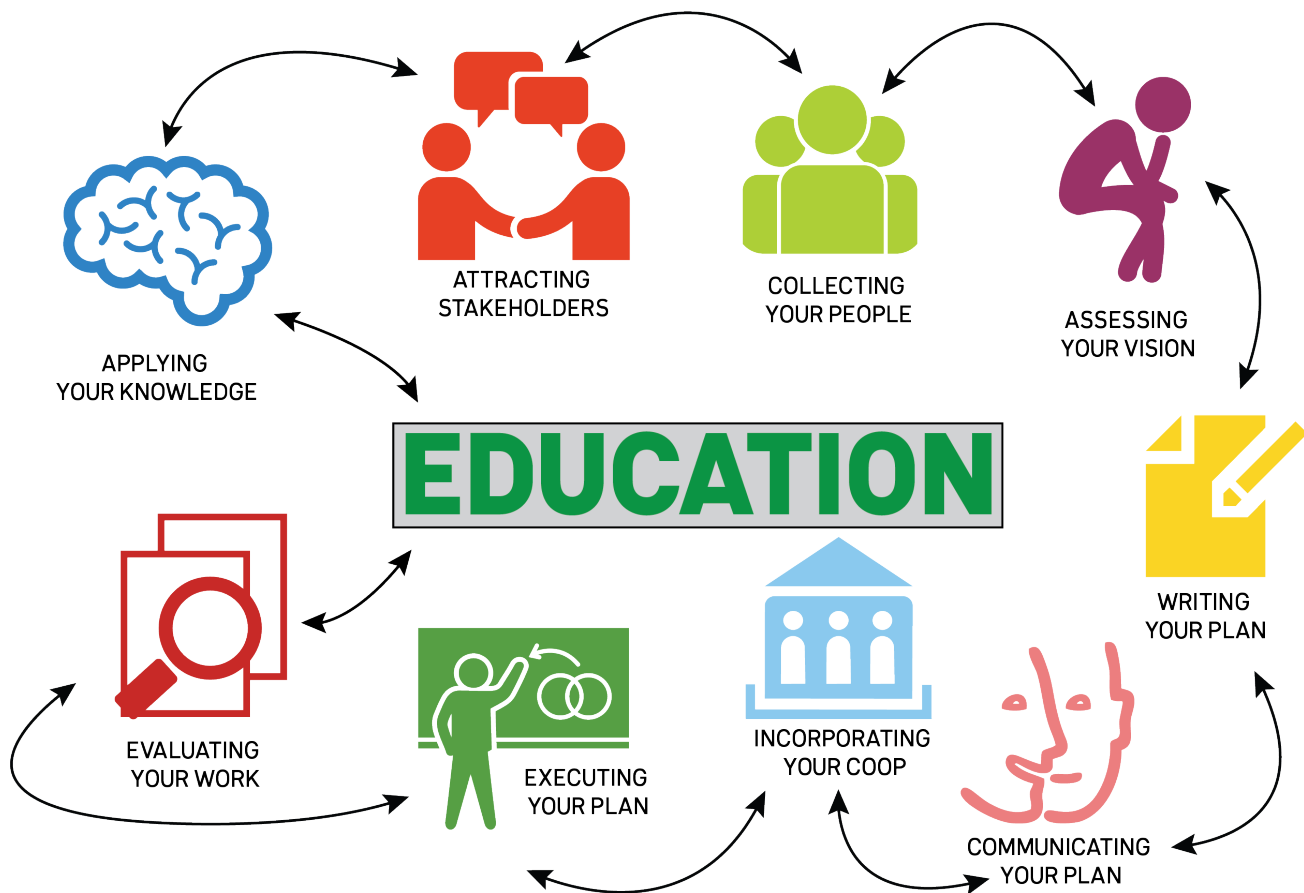
HANDOUT

OVERVIEW

This annotation breaks the cooperative development process into clusters of related tasks along a continuum. The process, as a continuum, is defined as anything that goes through a gradual transition from one condition or state to another without abrupt changes. Continuum is a particularly apt way to describe the development process, as the work is sometimes complex and not clearly delineated. You may find yourself moving through phases of development without really noticing. By clustering the tasks into groups and pairing them with “products” that may come out of that task cluster, you will have some orientation for where you are in your work.

CONTINUUM DIAGRAM

For ease of reference, here are the phases of development in short form -



CONTINUUM PHASES

The following is an annotated listing of each continuum phase, as well as its potential “products” or deliverables that would be ideal results of each completed phase:

EDUCATION

- Understand your and your community’s needs or aspirations
- Understand the cooperative model, generally and/or specifically dependent on your goal/s

APPLYING YOUR KNOWLEDGE

- Explore the potential application of the cooperative model as a solution for meeting needs or satisfying aspirations

Products: *An initial idea for a cooperative enterprise*

ATTRACTING STAKEHOLDERS

- Bring together all those with a direct “stake” in the potential project.
- Meet regularly to strengthen relationships and educate one another about the cooperative model, as well as to explore the relevant needs and aspirations in depth
- Identify which stakeholder group(s) will have membership roles - this informs who is best positioned to serve on a Steering Committee

Products: *Regularly meeting stakeholder group, potential membership role structure*

COLLECTING YOUR PEOPLE

- Decide on the expectations of membership on the Committee (e.g. meeting attendance, amount of time dedicated to committee work) prior to selecting members
- Determine composition of Steering Committee
- As a Steering Committee, develop a decision-making method and group structure (e.g. Will you have a Chair?).
- Create a purpose statement for the Steering Committee’s work – this is different than a purpose statement for the proposed cooperative enterprise and speaks to the intentions and boundaries of the work the selected group can and should do

Products: *Empowered and regularly meeting Steering Committee, decision-making method, Steering Committee purpose statement, beginnings of a project “identity”*

ASSESSING YOUR VISION

- Transition much of the workload to the Steering Committee to complete or delegate
- Create a vision statement for the desired cooperative enterprise, using input from multiple stakeholder groups (i.e. not just the Steering Committee)
- Research and/or engage “experts” in an assessment of the vision statement - specifically, the potential membership, management, and equity models that would facilitate the vision
- Select one to two potential models to test their feasibility by completing some of the following tasks* -
 - Reviewing case studies or stories of related businesses (e.g. similar cooperatives in other markets, similar non-cooperatives in the same market)
 - Conducting research (e.g. surveys, census data) on market demand (e.g. who is your market, what percentage of that market will you need to capture to be successful)
 - Running financial models (e.g. how much money will your business cost, how much income will you need in what time period)

- Putting your findings into a coherent document that concludes whether or not the project is feasible and, if so, the conditions required for the project to ultimately be successful

⚡ ***Notes -**

- *You can hire a professional to complete a feasibility study for you, or you can do it yourself.*
- *You will need to decide how rigorous or "professional" the plan needs to be - don't be deterred by example feasibility plans with lots of technical detail! You may not need that. Confer with cooperative development professionals or other experts, if you need advisement on your project's needs.*
- *A lot of this work can be difficult and require special skills - so this step can be a focus on increasing your group's capacity by engaging outside support and expertise.*

- ⚡ Begin recording your research and engagement findings in a working document (see "Writing Your Plan")

Products: *Project vision statement, Feasibility Study, beginning of a Business Plan*

WRITING YOUR PLAN

- ⚡ Continue work on the document drafted in the previous stage, evolve into a formal Business Plan for use with both your internal (e.g. potential members) and external stakeholders (e.g. financiers)
- ⚡ In tandem with your Business Plan, create additional documents and tools that will be implied to or conditioned by intentions laid out in the business plan - those documents are as follows (in priority order)* -
 - Purpose Statement (distinct from a Vision Statement, included as cornerstone in Governing Documents)
 - » Related - Guiding Principles
 - Governing Documents (i.e. Articles of Incorporation, ByLaws),
 - Refined Financial Projections (Feasibility Study projections used as foundation)
 - Financing/Fundraising Plans
 - Operating and/or Member Agreements
 - Outreach and/or Marketing Materials
 - Execution/Launch Plans (e.g. Project Management timeline of start of operations)
 - Descriptions of Operational Systems

⚡ ***Notes -**

- *Many of these documents will remain "working" and will be revised periodically throughout the development process.*
- *Many of these documents will be required alongside your Business Plan by outside stakeholders (e.g. financiers) - in particular, the Governing Documents, Financing Plans and Financial Projections, Agreements, Execution/Launch Plans*

Products: *Business Plan and related documents*

COMMUNICATING YOUR PLAN

- ⚡ Begin formal member outreach (e.g. Membership Drive), if relevant
- ⚡ Conduct effective and targeted public outreach with your story
- ⚡ Begin to reach out to potential financiers and funders
- ⚡ Reach out to political actors and advocates if you need to undertake some process with a level of government (e.g. building permit, business license)

Products: *Member Drive (if relevant), Political and Social Capital, Growth of Stakeholder Groups*

INCORPORATING YOUR COOP

- Incorporate your business as a legal entity!
 - Decide your cooperative's selection method for its incorporators and plan to execute it in time for incorporation
 - » It is not unusual for the Steering Committee to serve as the incorporating Board of the cooperative, then to hold formal elections with the membership following incorporation
- Incorporate your execution and launch plans into a project management timeline (a recommended tool at any step in the development process)
- Ensure your legal entity is equipped to take on financing, accept donations, and/or collect member equity

Products: *Legally Incorporated Entity, Project Management Plan/Timeline for Operational Launch, Beginnings of Capital Structure*

EXECUTING YOUR PLAN

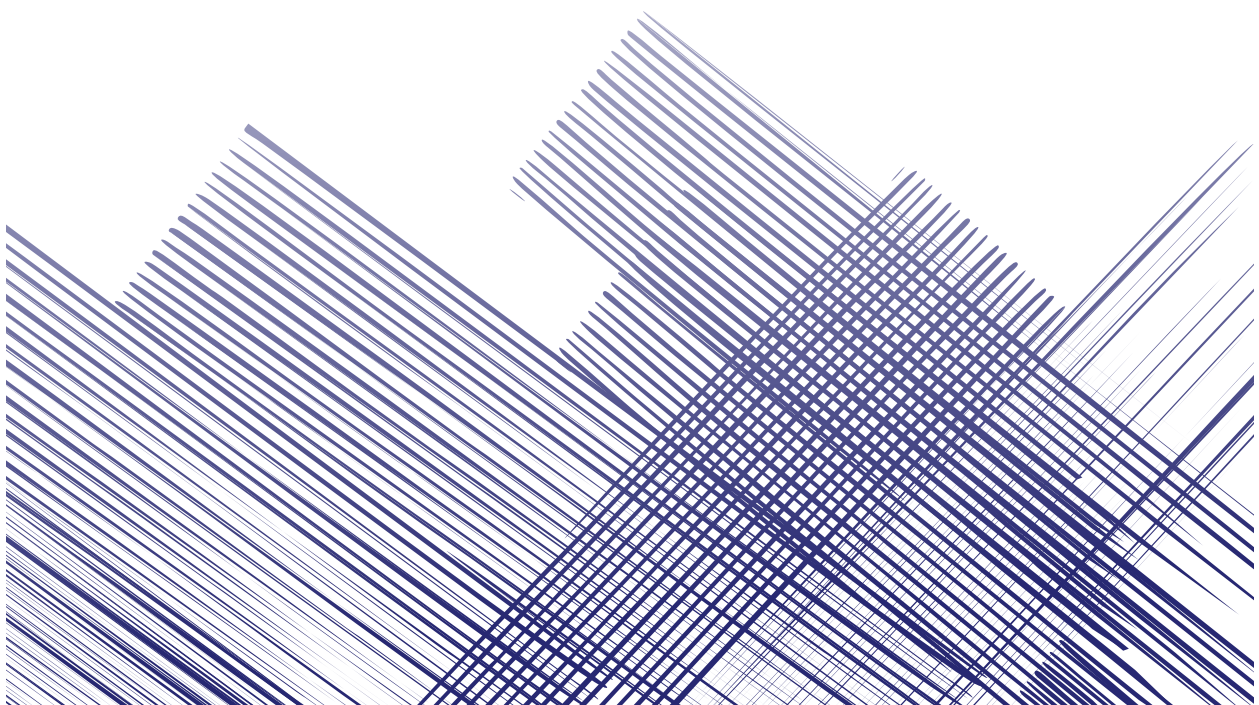
- Secure financing (e.g. loans)
- Conduct Formal Member Drive
- Make any needed leases or property purchases
- Hold Board of Directors elections
- Begin operations...

Products: *Cooperation!*

EVALUATING YOUR WORK

- Solicit reflections (e.g. via meeting, survey) from stakeholders on their experiences with and reflections on the development process
 - This step is what makes the process a continuum → by applying the knowledge you gain from the evaluation process, you are able to see how you can continue to develop* your cooperative
- ***Notes -**
 - *Development is not synonymous with expansion - it can involve growth that is quantitative and/or qualitative*

Products: *An awareness of your needs and the potential of cooperation*



CONTINUUM COMPONENTS

TOOL



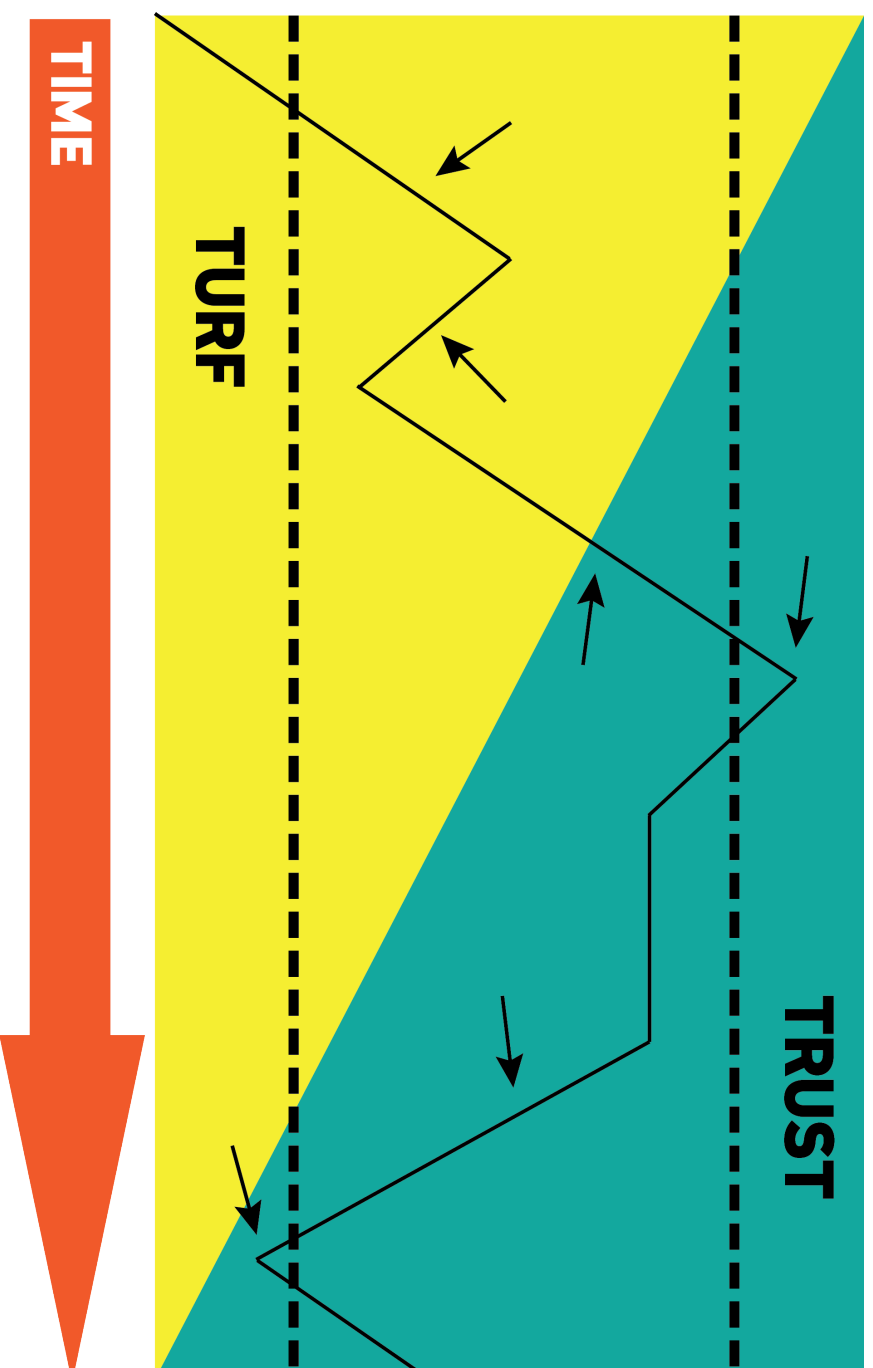
EDUCATION	Have an awareness of the cooperative model, as well as of your and/or your community's needs
Applying Your Knowledge	See the cooperative model as a potential solution to your and/or your community's needs or aspirations; Have an initial idea for a cooperative
Attracting Stakeholders	Bring together those with something to lose or gain in the potential project; Build trust in that group of people; Assess roles of group members
Organizing Your People	Identify the motivations and capacities of all stakeholders; Determine which stakeholders will serve on the Steering Committee (or comparable); Form Steering Comm
Assessing Your Vision	Create a Vision Statement for the cooperative; Assess the vision's feasibility (e.g. financially) yourselves and/or with support from various professional practitioners
Writing Your Plan	Begin written document detailing how the cooperative will feasibly function in order to achieve the vision; Create supporting and implied tools (e.g. Governing documents)
Communicating Your Plan	Conduct outreach - to attract financiers and donors, enlist political support, develop intra-industry relationships; Begin formal Membership Drive (if needed)
Incorporating Your Cooperative	Incorporate your cooperative as a legal entity OR your project into your existing cooperative; Transition your launch plan into a project management timeline
Executing Your Plan	Secure \$\$\$; Continue Membership Drive (if needed); Elect inaugural Board of Directors (if needed); Begin operations of cooperative or project
Evaluating Your Work	Hold a meeting, conduct a survey, solicit reflections from stakeholders on the development process

TURF, TRUST, & TIME

WORKSHEET

Collaboration is a process that makes it possible to reach a goal that cannot be achieved by one person or agency alone. This implies a need for negotiation and agreement about the goal and strategies.¹

- **Turf** is control over your own resources, ideas, and plans.
- **Trust** in one another and the shared process that is foundational for giving up any Turf.
- **Time** it takes to develop process, build Trust, and share Turf.



¹ ACT Center for Youth Excellence, <actforyouth.net/youth_development/communities/collaboration>

CHARACTER & COOPERATIVE CREATION: STEWARD'S GUIDE

HANDOUT



YOUR OBJECTIVE: Walk your group through the Character and Cooperative creation process. Each person will need to roll dice for each character identity element or cooperative enterprise trait. At the end, all group members should have a character complete with name, backstory, and tie to the group. The group should have a cooperative in a known sector, industry, urban/rural, niche, and with a tie to the group.

INSTRUCTIONS

1. Guide the group through creating their Characters by rolling each of the following identity elements and use the rolling key to determine their identity-

- Employment Status
- Income
- Age (optional)

Ensure that participant fill in their resulting character data on their Character Sheet.

2. Guide the group through creating the Cooperative by rolling each of the following cooperative characteristics and use the rolling key to determine the cooperative -

- Sector
- Industry
- Niche
- Urban or Rural

3. Engage the group in determining the exact type of cooperative they will roleplay, within the framework rolled in the previous step.

- A. Ask each participant to write up a specific business type that fits the rolled stats on a piece of paper.
- B. Crumple up the pieces of paper, put in a pile, and mix the pile
- C. Draw one, and – if the group thinks it is able to comfortably roleplay – announce the specific coop type the group will roleplay. If the group doesn't feel comfortable, keep drawing until an appropriate option is found.

4. Instruct participants to imagine their Character's backstory and its tie to the cooperative project.

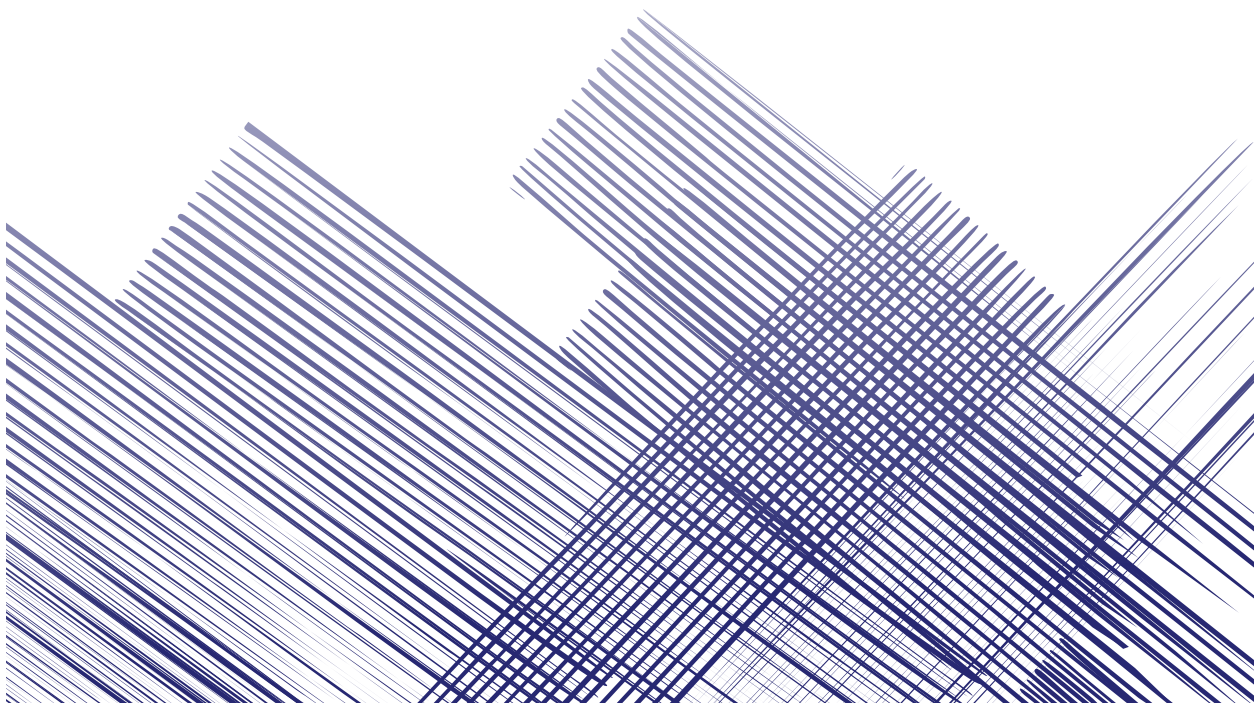
- A. Have participants respond in writing to the prompts on their Character Sheet to guide their imagination. Let participants know that they can check in with you or the session trainer(s) if they're having difficulty.
 - Even if a set of identity elements seems incoherent, remember that there are all kinds of people in this world – and, cooperation is for everyone because it takes all kinds!
 - If the rolled elements ultimately do result in an incoherent character, assess which element is the most incongruent and have the participant re-roll it. Only adjust one stat at a time.

5. **Have participants roll for skill development** by rolling a ten-sided die to gain up to ten points to spend on any of the listed skills. All skills can be acquired at different levels - “basic” (1 point), “skilled” (2 points), and “expert” (3 points).
 - Group Process Experience
 - Industry-Specific Experience
 - Financial Management
 - Writing
 - Humor
 - Marketing
 - Wild Card (anything you choose!)

6. **Instruct participants to pick their “Leadership Style (LS)”** by circling one of the six options on the Character Sheet (and listed below for reference). Explain that the LS defines a lot of how the character interacts in the group processes.
 - Individualistic & Rule-Governed
 - Individualistic & Chaotic
 - Mainstream & Rule-Governed
 - Mainstream & Chaotic
 - Collectivist & Rule-Governed
 - Collectivist & Chaotic

7. **Ask for a volunteer to add on the role of “Facilitator” to their character.** This means the participant will serve as the group’s Facilitator in the roleplay – i.e. they will facilitate the meeting as their character. Encourage participants to consider their alignment and identities to inform when considering the role.

8. **Pass leadership to the Facilitator** once the Character and Cooperative creation process is complete.



CHARACTER & COOPERATIVE ROLLING KEY

HANDOUT

Use the following tables to create a character and a cooperative project by rolling dice for each identity and cooperative element, respectively. Participants should roll "Percentage Dice" using one of the following dice and methods →

- Roll one ten-sided die twice in a row to identify, first, the digit in the tens place and, second the digit in the ones place.
- Roll two ten-sided dice of different colors or styles, with the tens and ones digits assigned to each die ahead of the roll.
- Roll one double digits ten-sided die (e.g. 00, 10) to identify the digit in the tens place and roll one ten-sided die to identify the digit in the ones place.

	ELEMENT	DESCRIPTION	FROM	TO	
CHARACTER	EMPLOYMENT bls.gov	Full-Time	1	78	
		Part-Time	79	95	
		Looking for Full-Time	96	99	
		Looking for Part-Time	100	100	
	INCOME (annual) census.gov	No Income	1	13	
		1 - 19.9k	14	45	
		20k - 39.9k	46	68	
		40k - 59.9k	69	81	
		60k - 79.9k	82	89	
		80 - 99.9k	90	93	
		100k+	94	100	
	COOPERATIVE	SECTOR	Worker	1	25
			Producer	26	50
Purchasing			51	75	
Consumer			76	100	
SPECIAL STATUS		Multi-Stakeholder ¹	1	29	
		Nothing Special	30	70	
		Conversion	71	100	
INDUSTRY ²		Sales & Marketing	1	12	
		Social & Public	13	51	
		Financial Services	52	85	
		Utilities	86	100	
LOCATION		Urban	1	81	
	Rural	82	100		

NOTES:

1. MULTI-STAKEHOLDER:

If rolled, re-roll until two of the following three sectors are represented - Worker, Producer, Consumer. While other stakeholder types and combinations exist, the possibilities are limited in this activity to simplify roleplaying.

2. INDUSTRY:

- **Sales & Marketing**
- e.g. farm supply & marketing, grocery & consumer goods, arts & crafts, entertainment
- **Social & Public Services** -
e.g. housing, healthcare, daycare, transportation, education
- **Financial Services**
- e.g. credit union, farm credit, mutual insurance, analysis
- **Utilities** - e.g. broadband, electricity, water

CHARACTER & COOPERATIVE ROLE SHEET

WORKSHEET

<u>CHARACTER DETAILS</u>	
NAME	
EMPLOYMENT	
INCOME	
OTHER...	

<u>SKILLS</u>	<u>LEVEL</u> basic, skilled, or expert

<u>LEADERSHIP STYLE</u> circle one	
Individualistic & Rule-Governed	Individualistic & Chaotic
Mainstream & Rule-Governed	Mainstream & Chaotic
Collectivist & Rule-Governed	Collectivist & Chaotic

What is your economic backstory (e.g. education or training history, role of identity in economic experience, work history)?

How are you connected to this coop idea?

Anything else about yourself you can share (e.g. hobbies, favorite outfit)?

<u>COOPERATIVE DETAILS</u>			
NAME		INDUSTRY	
SECTOR		LOCATION	
STATUS		OTHER...	

STEERING COMMITTEE

AGENDA

HANDOUT

TIME: 65 minutes, suggested agenda item lengths are included as minutes in parentheses

1. WELCOME & INTRODUCTIONS (15)

Get introduced and oriented

- Introduction Format
 - Name
 - Identity (share your preferred gender pronouns, age, etc.)
 - Economic Backstory (explain your employment status, income level, education level, etc.)
 - How are you connected to this coop idea?
 - Anything else?

2. GOALS, DECISION-MAKING, & AGENDA REVIEW (5)

Review the following items to set the tone and get everyone on the same page for the meeting's propose and process

- **Meeting Goals**
 - Gather and hear from all those interested in participating in discussing the possible development of a new cooperative
 - Begin developing a shared vision for the cooperative enterprise
 - Determine each person's motivations and capacity for participation in developing the cooperative
 - Build trust among the group, as well as collective momentum for continuing work on the cooperative
- **Decision-Making:** Any decisions will be made by a majority vote of those present unless another method is decided by the assembled group
- **Agenda Review:** Look over the meeting agenda together, provide any needed clarification, consider proposals for amending the agenda – especially in the context of the question, “Will this agenda help us meet our goals?”

GROUP PROCESS CONCEPTS

- ◀ **STEERING COMMITTEE**
A body within a project or enterprise that supports the guiding of its work. Its main concern is the making of strategic decisions concerning the future realization of the project or enterprise.
- ◀ **FACILITATE**
Generally, an act that makes a task easier for others; in the context of a meeting, making an experience more inclusive and effective through effective facilitation of the discussion/s inherent in spontaneous communication exchanges during a scheduled group meeting. (*Seeds for Change, “A Consensus Handbook” 2013: Leeds, UK, p 220*)
- ◀ **QUORUM**
The minimum number of relevant members who must be present at a noticed meeting for those members to conduct business (i.e. make decisions) in the name of the group.
 - E.g. - a majority of voting members, a supermajority of 65% of voting members
- ◀ **DECISION-MAKING METHOD**
The process by which a group determines an opinion or course of action.
 - **Voting** – everyone provides their vote and, typically, a decision is made if a pre-determined percentage of voters agree (e.g. 51%, 85%, majority, etc.)
 - **Consensus** – everyone involved must be able to live with the final outcome of the decision.

3. VISION DISCUSSION (15)

Move through the following questions by, first, journaling responses on Role Sheets. Then, begin discussion by sharing responses.

- What is your ideal vision for this cooperative?
- What would it mean to you and your life?

4. ASSESSING CAPACITY (10)

Move through the following questions in a roundrobin or popcorn discussion format.

- What can you contribute to realize that vision?
- What limits are there to your participation?

Steering Committee Participation Straw Poll: Without knowing the logistical details, who is interested in serving as a member of the Steering Committee at this moment?

- The question will be posed again at the end of the meeting, so this is an informal assessment to inform how much each person should weigh in on some of the logistical items (e.g. if not interested, expressing a strong opinion about when the Steering Committee should meet doesn't make sense).

5. STEERING COMMITTEE LOGISTICS (15)

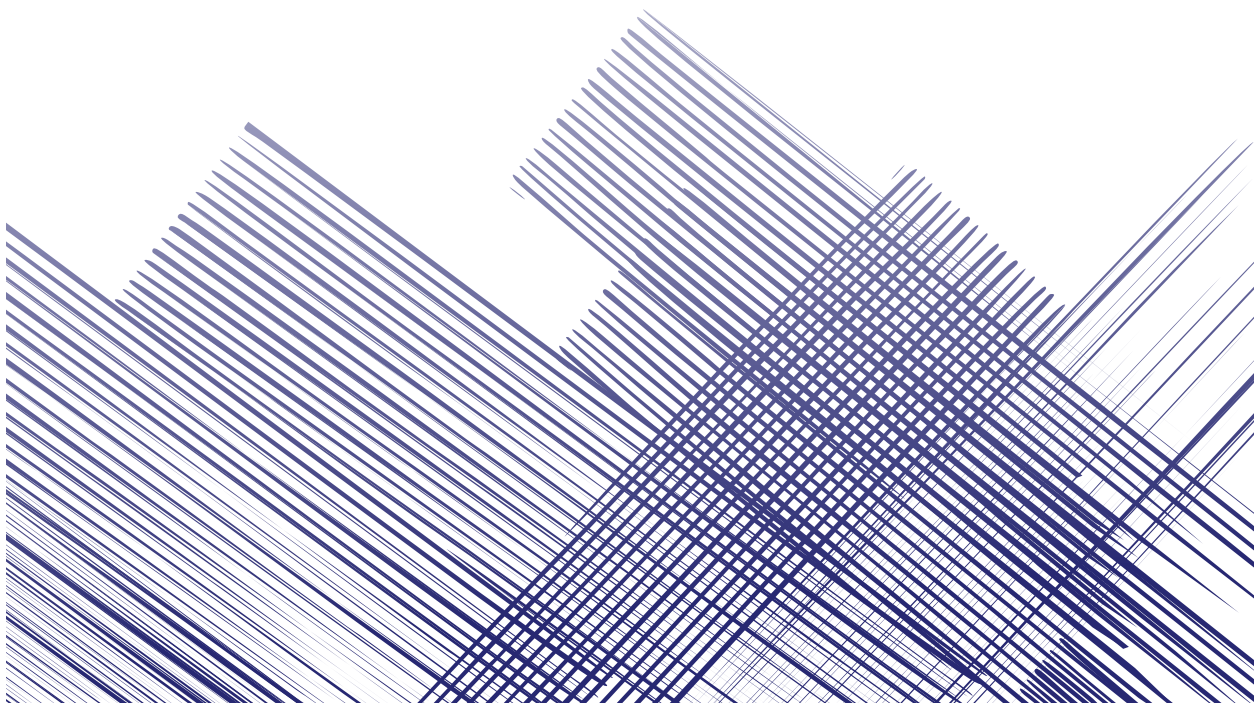
Move through and make decisions about the following items. Ensure decisions are recorded.

- **Meetings**
 - How often should the Steering Committee meet over the next three months to begin work on the project?
 - Where and when will the next meeting take place?
 - Are the meeting open to anyone or just specific people?
- **Membership & Roles**
 - After hearing the general meeting requirements of a Steering Committee member, who will commit to serving?
 - For those uninterested or unable to serve on the Steering Committee, suggest the preferred means of communicating the progress of the Committee? Are there any contributions that you would like to make to support the project in the future?
 - Who is willing to form the agenda and facilitate the next meeting? During the next meeting, you can discuss leadership of the Steering Committee and how facilitation can be handled in perpetuity.

6. CLOSING & NEXT MEETING (5)

Query the group for the following information in order to close out the meeting.

- What items do members want to see on the agenda for the first meeting of the Steering Committee? e.g. Quorum & Decision-Making Method, Steering Committee Purpose
- Any action items from this meeting?
- Reminder of the time, place, and facilitator of next meeting



COOP BIZ PLANNING AGENDA

HANDOUT



TIME: 60-70 minutes, suggested agenda item lengths are included as minutes in parentheses

1. WELCOME & INTRODUCTIONS (5*-15)

- **Welcome:** The Steering Committee for the cooperative development project has asked all community stakeholders to a meeting to help begin the project's written Business Plan.
- **Introduction Format**
 - Name
 - Identity (share your preferred gender pronouns, age, etc.)
 - Economic Backstory (explain your employment status and income level)
 - What do you do in your free time?
 - How are you connected to this coop idea?

**If your group has met recently, just do a go-around sharing names & identities.*

2. GOALS, DECISION-MAKING, & AGENDA REVIEW (5)

- **Meeting Goals: To identify...**
 - assets and skills present in the group to help create a Business Plan
 - some key elements of the cooperative's design to include in a Business Plan
 - what elements need to be researched (+ where that research could be conducted)
- **Decision-Making:** To make things simple for this meeting, decision-making will be made by a majority vote of those present unless another method is consensused upon by the group

3. REVIEW KEY QUESTIONS & ASSESS COMMUNITY ASSETS (10)

Read through the Key Questions Worksheet as a group.

- Individuals should step up to take on sections that relate to their skills & experience.
- If a section is unassigned at the end, have the person who has the most free time commit to researching that section after the meeting.

4. KEY QUESTIONS: SMALL GROUP OR INDIVIDUAL WORK (20)

Respond to each question in your respective section(s) on your own or with the others assigned to the same section.

- If no answer is known, a recommendation to the Steering Committee of where and how to research the answer, and/or the decision the Steering Committee will need to make to get the answer.

5. KEY QUESTIONS: REPORTBACK (15)

Go through the Key Questions Worksheet again as a group, this time having those assigned to each section to report on their findings or recommendation to the Steering Committee for each question.

6. CLOSING & NEXT MEETING (5)

Select Presentor(s) for sharing with the larger group your process on the Business Plan according to the following presentation format:

- » Name & Type of Cooperative
- » Summaries of two of the sections your group finds the most interesting

COOP BIZ PLANNING: KEY QUESTIONS

WORKSHEET

INSTRUCTIONS

Move through the following prompts, answering them to the best of your ability. Use phrases, words, pictures - no need to write an essay. If there is no way for you to answer some at this point in time, write in what you need to do or what needs to happen, first, in order to get the given question answered. The goal of moving through these questions is to identify both what you already have figured out about your cooperative, and how you are going to figure out the rest of the needed information that you don't yet have.

SUMMARY	
Who are the people founding the cooperative?	
What is the cooperative's purpose?	
What need is the cooperative meeting?	

STRUCTURE	
Governance: Through what mechanism(s) are "big picture" decisions (e.g. buy property) made within your cooperative?	
Operations: Through what mechanism(s) are day-to-day operational decisions (e.g. staffing schedule) made within your cooperative?	

CONTEXT

In what industry are you working?	
In what geographic area do you work?	
Who are you trying to serve? Where are those people? Will you be providing them a new service or are you seeking to replace a competitor?	

STRATEGY

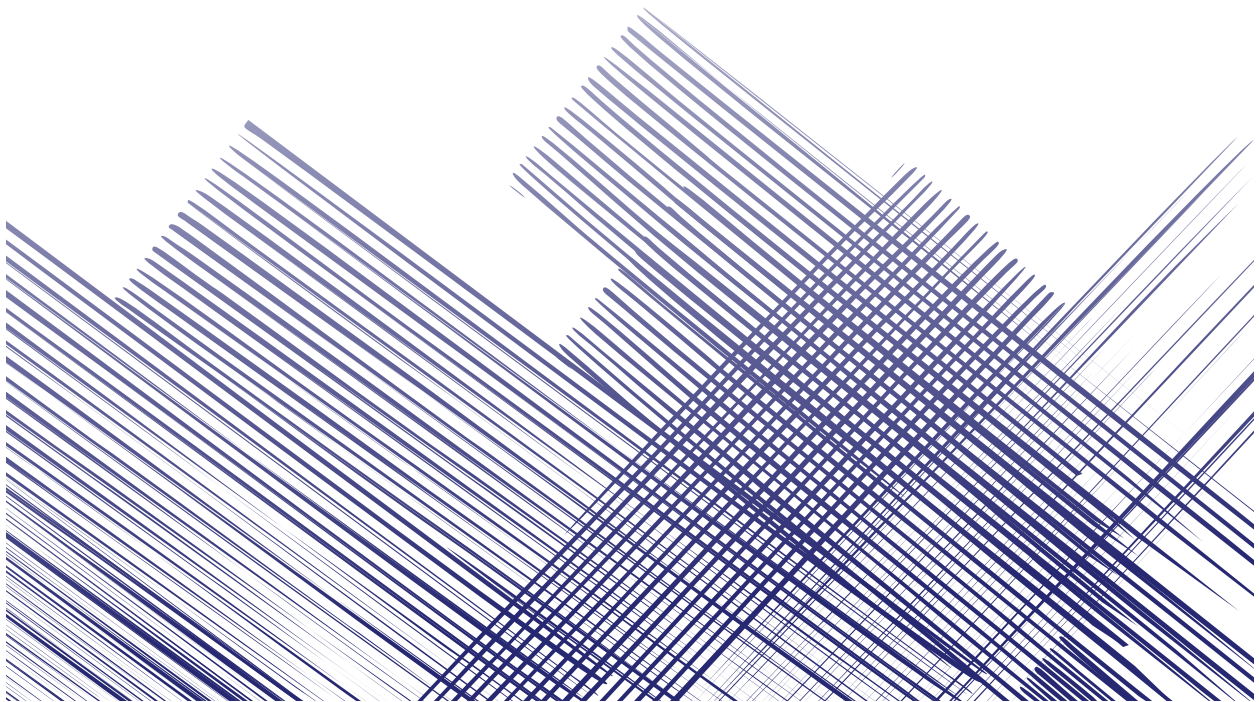
How will you connect with your target market? What will you say to your target market?	
How will you connect with supporters (e.g. financiers, elected officials)? What will you say to these supporters?	

PLANNING

What if you don't have money and cant get money?	
What if your target market is uninterested in your services?	

ASSESSMENT

How will you know when you are successful?	
What are at least one of each of the following goals for your cooperative: short-term (3 mnth), mid-term (1 yr), long-term (5 yrs)?	



COOP BIZ PLANNING: LEARNING AID HANDOUT



SUMMARY

Business planning is a process and tool for developing an organization, project, or program - regardless of whether or not you think your group or initiative fits well into a conventional understanding of “business.” Below is an annotated Table of Contents of a Business Plan sketching out a summary of the narrative content, tips on tone or formatting, as well as listings of other documents or items that need to be included in or used to inform a given section.

TABLE OF CONTENTS

The following content listing is only a suggested template. It can be useful to start with this outline and change section names, consolidate or split sections, disregard or add sections, and otherwise amend to suit your unique situation.

SUMMARY: What, Why, Who

- ◀ **It should briefly chronicle** the overall plan for the organization, project, or initiative. Tell your story, as well as included some informational updates. Include:
 - ♦ **Purpose statement or vision statement in your narrative**
 - ♦ Summary of **who is involved**
 - ♦ **Summary of what you do** - alongside descriptions of any elements of what you do that may not be common knowledge (e.g. “Popular Education” would need to be explained)
- ◀ Depending on your audience, you may need to include an explanation **of cooperation and the cooperative model** (e.g. include the ICA Cooperative Identity, share a brief history of cooperation relevant to your industry/geography).
 - ♦ Clarify the **particular type of co-operative you are** (e.g. sector, membership).
- ◀ **Describe the history or your philosophy behind the type of work you do** beyond cooperation (e.g. education, local food).
- ◀ It is important it **be compelling in tone and content** – appeal to emotion or share intriguing statistics or facts in order to motivate the reader to review the remainder of the report (e.g. “We want to create a cooperative to provide meaningful employment for young people in an area where 65% of youth are unemployed.”).

STRUCTURE: Membership & Management

- Expanding on the previous section, this section should lay out your **organizational structure (i.e. how governance and operations are organized)**. This is a useful place to include an organizational chart, staffing/management chart (if different from organizational chart), and a (potential) member list.
- **Brief bios for key people** (e.g. inaugural Board of Directors) belong in this section. [Complete CVs for key people should be included in the Appendix.]
- **Reference secondary stakeholders** - such as advisors, financial partners, or industry connections - and their affiliations in a more shortform manner than the bios for key people.

CONTEXT: Market & Niche

- This section should describe **where you are oriented within a larger market** and/or community context. Key questions to answer here are:
 - ◆ What is the **industry** in which you work (e.g. grocery)?
 - ◆ Who is your **target market** in that industry (e.g. food consumers)?
 - ◆ What **reach and effect** will you have on that target market in that industry (e.g. Around 4,000 people who live in my neighborhood are currently without an area grocery store - we will provide a local option for groceries so community members won't have to transit 20 minutes to the nearest store.)?
- Additionally, focus on the specific **need you are addressing** and how your cooperative will fulfill the stated need. Be sure to reference your **competition**, and where you fit in the context and history of your industry.
- You'll need to **demonstrate that your business idea is feasible** - that you will actually be competitive in the marketplace. Responses from surveys of your target market, percentages of households in your geography that may frequent your cooperative, and other project assessment deliverables should be included to demonstrate that feasibility.
 - ◆ If completing a feasibility study was relevant to your project or organization for this vision, this section will draw largely from that work.

STRATEGY: Outreach & Marketing

- In this section, you will detail **how you will attract and retain stakeholders - ranging from potential members, other users who are distinct from members (if applicable), and potential supporters (e.g. financiers)**. This section can address topics ranging from plans for initial advertising campaigns to your long term messaging and branding.
- You will likely have **several different ways in which you outreach and market to different stakeholders**. Figuring what "hat" you will be wearing as you market or "speak" to each stakeholder and how you will manage each of your different hats is a good way to think about this task.

- ♦ For example, if you are starting an affordable housing cooperative - you will wear the hat of an affordable housing provider to potential residents, while you would wear the hat of a responsible and accountable neighbor to other homeowners in the area.
- ◀ The **medium for how you are reaching each stakeholder group** is also important to include (e.g. walk door-to-door to connect with each potential new neighbor).

CAPITAL: Finances & Fundraising

- ◀ You'll need to answer some basic, but big, questions in this section:
 - ♦ **Do you have money?** If so, how'd you get it? If not, how and where will you get money?
 - ♦ **What will you do with money?**
- ◀ **What other kinds of capital** are you using to make this project or organization work? In a cooperative enterprise, a variety of capital is utilized (e.g. sweat equity or volunteer/time). You might have to explain these concepts a bit (similarly to how you explained "cooperation" in the opening sections) as they may be unfamiliar to a reader of your plan. However, these **"other" kinds of capital inputs deliver real value** to an initiative or organization and demonstrate the value of cooperation.
- ◀ **"Triple Bottom Line" budgeting** is a practice that starts tracking and calculating non-fiscal types of costs and gains – you can use that format as a guide or just create your own by estimating the value of the hours of labor you're inputting and include that in your financial reports. *Check out en.wikipedia.org/wiki/Triple_bottom_line for more information.*
- ◀ Some **financial communication tools** that are always good to include, if relevant:
 - ♦ **Cost Schedule:** Consists of all the costs occurring in the implementation process of the project, creating a total expense budget for the effort prior to the start of when revenue is earned (if applicable).
 - ♦ **Pro Forma:** In this context, a model of what the project will look like financially as it is completed, including revenue. You can do this kind of modeling report for various stages of development (e.g. purchasing a building and paying on the financing, conducting a construction project on one room, expanding the membership class to bring on new members and dues).
 - ♦ And, like CVs, you can put the full reports into the Appendix and put **nice visual or informative "excerpts" from financial communication tools** into the body of the section.

PLANNING: Risks & Obstacles

- ◀ This section asks you to preempt some of the questions potential stakeholders might ask - some examples are as follows:
 - ♦ What if you **can't get enough money**, what if you **lose money**?
 - ♦ What if your **target market proves to be uninterested**?
 - ♦ What if the **market changes** and you have more competitors than you anticipated?

- The various **types of risk that you might need to address vary by your market, management, industry, and more** – it is up to you to pick what key risks are worth highlighting in this section.
- Demonstrating your awareness **of potential issues or obstacles** showcases both the due diligence you have done in assessing your project’s feasibility, as well as your likely level of resilience in the face of that risk.

ASSESSMENT: Goals, Objectives, & Benchmarks

- Include in this section **concrete and measurable goals and benchmarks** that will allow you to self assess your success and failure in implementing your project (e.g. 500 new members by the month before the cooperative starts operation).
 - ◆ These concrete and measurable objectives will keep you accountable to your stakeholders with whom you share your plan.
- The tools you create to include in this section can serve as the basis for **project launch plan**, which should also be included in this section, if started.

CONCLUSION

- Use this section to **round out the narrative you began in your summary** by tying the “why” of the project into the logistics you described throughout the plan.
- Often, a conclusion **talks about the future** (e.g. what your project could mean to your community in the next ten or twenty years) – which can be a powerful and inspiring. That kind of messaging can compel the reader to continue or begin their engagement with you and your project (e.g. restate the real impact you’ll have in the lives of your members or other beneficiaries).

BIBLIOGRAPHY

- Use endnotes throughout the plan to reference documents or articles you used in substantiating a claim – pull together the **endnotes** as part of the bibliography. Related to this, use footnotes throughout, as well, to spell out definitions or describe concepts that may be unfamiliar.
- **Reference readings, articles, or supporting materials** (e.g. blog post on a similar cooperative to your project) that you used to shape your plan and vision. Include these in whatever style is appropriate to your project (e.g. simple list with urls, APA style format).
- Be sure to include any **media coverage** of your group (e.g. radio interviews, blog posts, social media posts), alongside any **self-promotion** you’ve done (e.g. presentations made).

APPENDIX

- ◀ Tuck into the appendix anything that doesn't quite fit in the narrative format or is just a good addition to the overall picture you are trying to present in your plan. For example -
 - ♦ **Curriculum Vitae/Resume for folks mentioned in the “Structure” section**
 - ♦ **Development-specific documents** (e.g. visioning, grant applications, art projects)
 - ♦ **Operation-specific documents** (e.g. membership applications, flyers, food buying list, orientation/education tools, etc.)
 - ♦ All your **financial reports** referenced in your “Capital” section

WORKSHOP EVALUATION

INSTRUCTIONS: List 0-3 pieces of feedback in each of the below boxes on the content, format, delivery, logistics, accessibility, and/or culture of the workshop.	
Plus // Stuff you liked	Delta // Stuff you would amend

WHAT IS SOMETHING THAT YOU LEARNED?

WHAT IS SOMETHING THAT YOU HAVE QUESTIONS ABOUT?

IDENTITY: Who has what feedback on the workshop is important. We ask that you provide as much of the following information about your identity as you feel comfortable. This helps in improving future workshops.

Age:

Where You Live:

Gender:

Cooperative Experience:

Race(s):

Anything else?:

ANYTHING ELSE?

