

Themes and Recommendations from the International Co-operative Governance Symposium

Saint Mary's University, Halifax, Canada • September 5-7, 2013

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Hosting symposia is another important initiative. Symposia help the co-operative sector explore potential solutions to tough, unanswered questions; provide input into the university's research, training, and education agenda geared toward improving co-operative practice; and broaden participants' perspectives while learning from other experts across the co-operative movement.

Over the past decade, Saint Mary's University has hosted four symposia:

- International Co-operative Governance Symposium - 5-7 September 2013
- Co-operative Legislation and Public Policy Symposium - 19-21 June 2009
- Symposium on the Co-operative and its Workers - 15-17 June 2006
- Symposium on Co-operative Accounting - 2-4 June 2004

For more information on education programs, symposia, the Centre of Excellence in Accounting and Reporting for Co-operatives (CEARC), and other initiatives, visit www.ManagementStudies.coop or contact Karen Miner, Managing Director, karen.miner@smu.ca.

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Executive Summary

The International Co-operative Governance Symposium in Halifax, Canada (September 5-7 2013) provided an opportunity for co-operative leaders, academics and practitioners, to discuss the importance of good governance that fosters co-operative identity and to provide insights into the participation theme of the International Co-operative Alliance's (ICA) Blueprint for a Co-operative Decade and associated 2020 Vision.

Participants explored the unique aspects of co-operative governance and identified challenges, opportunities, and best governance practices from their experiences and perspectives, but also the overlapping requirements of leadership and accountability shared with other business types.

This report is divided into sections defining co-operative governance and its purpose, focusing in on four objectives that co-operative governance must accomplish (listed below), and proposing the necessary skills needed to accomplish these objectives.

What does co-operative governance need to accomplish?

- i. Democratic (member) control**
- ii. Creating and maintaining co-operative culture (values)**
- iii. Meeting member-user needs**
- iv. Long term viability as a co-operative**

Democratic Control and Meaningful Participation

Democratic control coupled with ownership is a part of the co-operatives' DNA and is one of key characteristics that distinguishes co-operatives from traditional businesses. Co-operative democratic processes vary and are largely dependent on size, type (i.e. worker, consumer, producer), and sector to which co-operatives belong. Decision-making can follow different rationales; some co-operatives opt for democratic procedures based on consensual decisions, others apply proportional representation, or rely on majoritarian systems.

In a situation in which the membership is not involved in governance matters, the risk of having a minority controlling the resources, taking decisions and wielding illegitimate power is high. The risk of oligarchy can be avoided by encouraging member participation and by establishing governance processes that delegate power and raise awareness throughout the entire organization. Open and clear communication is necessary for members to take informed decisions and allow their organization to be agile and to respond well to adversity.

Participation needs to penetrate the organizational culture deeply, both through participatory management and governance practices, engaging members and employees in decisions, and through connections with the larger co-operative community.

Engaging and Inspiring Culture

Applying co-operative principles and values in governance and in business relations is a critical element of co-operative culture, and the keystone of the 'co-operative difference'. Co-operative culture is the projection of the co-operative identity in artifacts and rituals, and it is recognized as the co-operative way of doing business. To make sense of the co-operative model and strengthen their identity, co-operatives need to cultivate the 'associative intelligence' of their members.

Besides the importance of communicating their internal governance processes (i.e. 'ways of doing business'), co-operatives need to reflect on what they choose to communicate to the outside world and how they connect with their members and society. Accountability to current and future members, as well as other key stakeholders, must therefore be secured in co-operative governance practices to preserve trust of a wider group of citizens beyond their members.

In order to cultivate associative intelligence and consequently foster co-operative culture, co-operatives need to concentrate their efforts in refining two critical areas: communication and education.

Meeting Member Needs

Co-operative directors need to be pro-active and visionary, but remain true to the values of their co-operative and respond to emergent strategies with members' interest in mind. The Board in a co-operative serves as a locus for the convergence of interests, rather than representation of the conflict of interest.

Member needs are evolving with the changing environment. 'Checking the pulse' of members using tools such as focus groups or surveys is important to stay true to the co-operative mandate. New technologies offer many opportunities to dialogue with members and stakeholders. Social media have the potential to increase the transparency of communication, facilitate discussions, and entice young people to participate in, or start up, co-operatives that portray the culture they wish to share.

Long Term Viability

Co-operative viability is essential to meet member needs. The particular challenge for co-operatives and their long term viability is growth - what kind of growth is appropriate and what systems are in place to facilitate 'healthy' growth are decisions that can strengthen or weaken the co-operative culture.

Democratic control by user-members of a co-operative implies the supporting role for capital as a means to fulfill the purpose of the co-operative. Increasingly, large co-operatives go beyond the 'traditional' member-capitalization methods and tap into capital markets. This strategy carries the danger of undue influence of capital over the co-operative. Systems and rules have to be in place to secure member control, and to avoid isomorphism with the investor owned enterprise, or demutualization.

Among their tools for risk diffusion, co-operatives have networks (federations, second tier coops, supply chain networks, and other complex co-operative networking arrangements) at their disposal, as an application of the co-operative principles and values.

Training and Education for Good Governance

Co-operatives must engage in building knowledge and developing the capacities and skills of their members, board, and staff to ensure that they are able to ask pertinent questions and tackle new or unanticipated issues with critical analysis and creative problem solving skills consistent with the co-operative model.

All co-operatives need to have skilled decision-makers. The balancing among strong member representation, sophisticated understanding of the co-operative model, and technical expertise in governing bodies is pervasive in co-operatives. Co-operative management education is therefore a critical component of delegate, director, and management skill sets. Education informed by co-operative values and principles reinforces the unique aspects of the co-operative model.

There are still significant gaps in training geared to the co-operative context. As a result, the sector risks adopting governance approaches that do not match the business model.

Recommendations

During this decade of co-operation, the sector can improve co-operative governance by:

- Being critical of governance structures and processes to verify that democratic (member) control is in place. Prevent the concentration of power; delegate power and raise awareness throughout the entire organization.
- Enhancing and maintaining co-operative culture. Develop 'symbols' that fit the contemporary co-operative culture.
- Continuing to meet member needs. Use tools (surveys, focus groups) and technology (e.g. social media) to keep open communication with members.
- Focusing governance on long term viability as a co-operative. Ensure processes for member (user) control; sustainability; risk mitigation.
- Recognizing the need for more co-operative education and training. Connect with the educational institutions; build training programs; encourage co-operative specific education, particularly in management; invest in people; educate the community about the co-op business model.

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International Co-operative Governance Symposium

Introduction

The International Co-operative Governance Symposium hosted by Saint Mary's University was a gathering of governance practitioners and researchers who discussed and debated the challenges and opportunities for co-operative governance at a global scale.

In the lead-up to the Symposium, Pauline Green, President of the International Co-operative Alliance (ICA), stated that "Good governance is vital to the trust and confidence in which business is held in today's world. Moreover it is the life blood of our people-owned and controlled model of business—so congratulations to Saint Mary's for this governance symposium which will highlight a key ingredient in helping us build this co-operative decade."

Hosting symposia is an important initiative for Saint Mary's University. This symposium helps the sector explore potential solutions to tough, unanswered questions; provides input into the university's research, training, and education agenda geared toward improving co-operative practice; and broadens participants' perspectives while learning from other experts across the co-operative movement.

The governance-focused Symposium was well timed as the ICA develops the implementation

plans for the Blueprint for a Co-operative Decade and aimed to contribute to the ICA's thinking on how best to progress the governance related goals of the co-operative sector globally. Roughly 100 participants attended the Symposium (Appendix A), and this report attempts to synthesize the themes and recommendations that emerged from this group during the Symposium.

Co-operative Governance and the Blueprint for a Co-operative Decade

At the end of 2012, the ICA General Assembly approved the *Blueprint for a Co-operative Decade*ⁱ. The document presents the strategy to pursue a 2020 Vision, listing the goals that co-operatives are invited to accomplish by the end of the decade. The three main objectives are to become the:

1. leaders in economic, environmental and social sustainability;
2. business model favoured by the people; and
3. fastest growing form of enterprise (Blueprint p. 6).

To reach these objectives, the Blueprint identifies five interconnected themes and suggests actions to be implemented across the co-operative movement in pursuit of the 2020 Vision.

The first theme discussed in the ICA Blueprint is *Participation*, which includes the topic of governance. In particular, co-operatives are called upon to “elevate participation within membership and governance to a new level” (Blueprint p.8).

Co-operatives are a better way of doing business because they empower individuals through participation and ownership (Blueprint p.9). This makes them more engaging, more productive and more useful in the contemporary world. Democratic member participation is the best-known feature of the co-operative way of doing business, and a major part of what contrasts co-operatives to investor-owned businesses. Participation is seen as one of the co-operative sector’s most valuable resources and a source of competitive advantage.

Participants at the International Co-operative Governance Symposium explored the unique aspects of co-operative governance and identified challenges, opportunities, and best governance practices from their experiences and perspectives.



“Co-operatives are a reminder that it is possible to pursue both economic viability and social responsibility.”

– Ban Ki-moon

Global Economic Context

The latest global financial crisis that flared up in 2008 has seriously challenged some basic assumptions about the capitalist economy. Given the current economic climate and the rising critiques targeting the aggressive neo-liberal economic model, there has been a growing interest in entrepreneurial models that combine economic and social aims, co-operatives in particular.

Today, co-operatives include more than 1 billion members around the worldⁱⁱ offering over 100 million jobs (20 percent more than multinational enterprises) with revenues equalling the tenth largest global economy. In 2008, the 300 largest co-operatives had a combined annual turnover of \$1.6 trillionⁱⁱⁱ. Empirical research has suggested that co-operatives have been more resilient

through the financial crisis, maintaining a stable employment level and displaying greater growth rates compared to their investor-owned counterparts^{iv}.

Every year, the United Nations selects particular subjects and themes to promote in recognition of their effort in creating a better world. 2012 was declared the “International Year of Co-operatives”^v. The intent of this year was to foster knowledge and to raise awareness about the co-operative movement around the world, celebrating co-operatives as an alternative and better way of conceiving and doing business.

Defining Co-operative Governance

The word governance has its root in the Latin verb “Gubernare” which derives from the Greek “Kybernan”, meaning “to lead, to steer, to be the head of, to set rules, to be in charge of the power”. Governance is related to vision, decision-making processes, power dynamics and accountability practices. The ultimate goal of governance is to effectively fulfill an organization’s goals in a way consistent with the organization’s purpose.

What does co-operative governance need to accomplish?

- i. Democratic (member) control
- ii. Creating and maintaining co-operative culture (values)
- iii. Meeting member-user needs
- iv. Long term viability as a co-operative



“Governance is essential, exciting and existential”

– Brett Fairbairn

Democratic Control and Meaningful Participation

As democratic organizations, co-operatives need to induce participation of their members in the decision-making processes. The concept of participation in co-operatives is tied to the member-owned and controlled nature of the organization. Given the diversity in the co-operative movement, what does democratic member participation mean to co-operatives? Are there common elements across all co-operatives?

Democratic control coupled with ownership is a part of the co-operatives’ DNA and is one of key characteristics that distinguishes co-operatives from traditional businesses. The second principle of co-operation states that co-operatives are democratic organizations owned and controlled by their members, who are actively engaged in the decision-making processes.



“Co-op governance is about the convergence of interests, rather than conflict of interests”

– Jean-Louis Bancel

Democracy is a defining value of co-operation, it is rewarding and empowering, and its processes often create a fertile ground for innovation. Nonetheless, keeping democracy alive is a complex task, especially as self-governing processes are chaotic and outcomes are unpredictable.



"It is a question of creating an adult relationship between the members and the co-op."

– Bob Cannell

Co-operative democratic processes vary and are largely dependent on size, type (i.e. worker, consumer, producer), and sector to which co-operatives belong. Decision-making can follow different rationales; some co-operatives opt for democratic procedures based on consensual decisions, others apply proportional representation, or rely on majoritarian systems.

Co-operatives belong to their members, and it is the membership that democratically decides about the rules of governance. In a situation in which the membership is not involved in governance matters, the risk of having a minority controlling the resources, taking decisions and wielding illegitimate power is high. In other words, co-operatives need to avoid becoming an oligarchy disguised as a co-operative.

This risk can be avoided by encouraging member participation and by establishing governance processes that delegate power and raise awareness throughout the entire organization. Distribution of power among a larger group of decision-makers is essential for participation to be reinforced as the co-operative's most valuable asset. (Blueprint, p 10). To this end, succession and turnover of directors is extremely important.

Enhancing democratic participation also means creating loyal relationships between the co-operative and the members, based on trust and transparent communication. Open and clear communication is necessary for members to take informed decisions and allow their organization to be agile and to respond well to adversity. The key aspect of co-operative resilience lies in these three concepts: transparency, trust, and loyalty.

If we had to list what "participation" means to a member, this list would include some of the following actions: becoming a member, participating economically through goods and services provided, voting, taking part in meetings and general assemblies in order to discuss and deliberate, contributing to committees, running for positions of responsibility and standing for election to the board.

In co-operatives, in particular those with large memberships, participation can remain superficial to the potential detriment of the co-operative nature of the enterprise. It is often stated that 'cooperatives need a crisis to get full member participation'.

Rather, participation needs to penetrate the organizational culture deeply, both through participatory management and governance practices, engaging members and employees in decisions, and through connections with the larger co-operative community.



"There is a crisis of participation."

– Peter Davis

Engaging and Inspiring Culture

Organizational culture has been defined as “the basic pattern of shared assumptions, values and beliefs considered to be the correct way of thinking about and acting on problems and opportunities facing the organization”^{vi}.

“Culture” is a word of Latin origin. It derives from the verb “colere”, “to cultivate”. Culture is about cultivating: preparing the environment, planting the seeds and having them grow. The etymology of this word is also a metaphor. The co-operative identity is the soil, the values are the seeds and the results are shared values, norms, behaviours, ceremonies and symbols that co-operators recognize as theirs. Co-operative culture is the projection of the co-operative identity in artifacts and rituals, and it is recognized as the co-operative way of doing business.

“To make sense of the co-operative model and strengthen their identity, co-operatives need to cultivate the ‘associative intelligence’ of their members.”

– Larry Haiven

Associative intelligence is defined as “a belief that there is a special kind of knowing that emerges when people work together effectively; a conviction that people through working together could learn skills that would make collective behaviour more economically rewarding, socially beneficial and personally satisfying.”^{vii} Associative intelligence is the key element in successful and innovative co-operatives.

In order to cultivate associative intelligence and consequently foster co-operative culture, co-operatives need to concentrate their efforts in refining two critical areas: communication and education.

“The most successful co-operatives are the ones that are not scared to behave like co-ops.”

– Bob Cannell

Besides the importance of communicating their internal governance processes (i.e. ‘ways of doing business’), co-operatives need to reflect on what they choose to communicate to the outside world and how they connect with their members and society.

“Communication and governance are two sides of the same coin.”

– Brett Fairbairn



Affinity Credit Union in Saskatchewan is among the larger Credit Unions in Canada, with more than 140,000 members and approximately \$4.5 billion in managed assets. Affinity values direct relationships with its members.

The Annual General Meeting, for example, is telecasted live to some of the communities where they operate. Moreover, at Affinity they are known to invite their members for coffee, organizing meetings in local cafés to encourage input and feedback from client/members.

Co-operatives are held to a higher standard when it comes to their relationship with the community around them. They are expected to be exemplar corporate citizens, meaningfully engaged in the civil society. Accountability to current and future members, as well as other key stakeholders, must therefore be secured in co-operative governance practices to preserve trust of a wider group of citizens beyond their members.

"Co-operatives need meaningful engagement, which is the result of a shared sense of culture."

– Iain Macdonald



Meeting Member Needs

If governance is about steering the organization in order to fulfill its purpose, what is the role of the Board of Directors in co-operatives? How can the Board's decisions stay relevant to the members in an ever-changing environment?

"Finnish consumer and agricultural co-ops include elected supervisory Boards who appoint Executive boards and management."

– Kari Huhtala

The Board can be viewed as a locus where "convergence of interests" should be realized, with the directors in the role of facilitators. Directors need to remain true to the values of their co-operative and focus on servicing their membership's needs. The reality-check for co-operative Boards should start with the question: to which extent is the Board imposing its decisions versus

trying to understand and act according to the needs and desire of the members? Boards need to be pro-active and visionary at the same time and respond to emergent strategies with their members' interest in mind.



The Sustainability Scorecard is a project developed by Co-op Atlantic (Canada) and several of its member co-operatives in collaboration with researchers from two different universities (Mount Saint Vincent and Université de Moncton). The scorecard was created to identify and measure the characteristics that make co-operatives unique. The tool evaluates the co-operative performance and utilizes the seven co-operative principles plus economic, environmental and social measures to assess the co-operative identity and related practices. To measure stakeholders' perception, the scorecard also includes two surveys, one for employees and one for members/customers. Besides providing information about the co-operative difference, the tool is also useful as a strategic resource to highlight the achievements, address shortfalls related to co-operative priorities, provide external benchmarks and track co-operative practices.

Member needs are evolving with the changing environment. Decision-making bodies need accurate information to make informed decisions. Co-operatives, by the nature of their business structure, typically have a lot of information about their members or can easily access the views of their members directly. Co-operatives with large memberships can use tools like focus groups and surveys to 'check the pulse' of members on a regular basis. This information can be used to verify that decision-making is in line with member interests and to assure members that their needs are being considered.

New technologies offer many opportunities to dialogue with members and stakeholders. Social media has the potential to increase the transparency of communication, facilitate discussions, and entice young people to participate in or start up co-operatives that portray the culture they wish to share.

Long-Term Viability

Co-operative viability is essential to meet member needs. The particular challenge for co-operatives and their long term viability is growth – what kind of growth is appropriate and what systems are in place to facilitate ‘healthy’ growth are decisions that can strengthen or weaken the co-operative culture. Co-operatives engage in organic growth, opt for a spinoff model, enlarge their member base by mergers, or pursue aggressive highly capitalized growth strategies. In any case, increasing complexity, risk and uncertainty require agile system components held together by a common purpose and values.

Democratic control by user-members of a co-operative implies the supporting role for capital as a means to fulfill the purpose of the co-operative. Increasingly, large co-operatives go beyond the ‘traditional’ member-capitalization methods and tap into capital markets. This strategy carries the danger of undue influence of capital over the co-operative. Systems and rules have to be in place to secure member control, and to avoid isomorphism with the investor owned enterprise, or demutualization. While the interest of founding members shifts over time, adhering to the principles of cooperation (c.f. open membership) will ensure inter-generational transfer of the co-operative business.

Preventing the focus on the ‘return on investment’ at the expense of ‘user (purpose)’ focus, and ensuring control by (user)-members are the implications of successful governance and management of change in co-operatives. While one can argue that demutualization may be in the interest of (current) members, as it is, after all, a democratic decision, co-operative success must be defined in terms of its survival and viability as an organizational form.

"The power of 'WHY' leads the cooperative forward."

– Jerry McGeorge

"The co-op way of doing business is very elastic and flexible. We should avoid dogmatic thinking, but rather be focused on the extent the co-op really serves the purpose of its members"

– Fabio Chaddad

Among the tools for risk diffusion, co-operatives have networks at their disposal, as an application of the co-operative principles and values (ICA 1995). Cooperation among co-operatives can include the formation of federations, second tier coops, supply chain networks, and other complex co-operative networking arrangements. It can also mean collaboration with various like-minded organizations with a shared purpose. The advantage of networks, besides increasing co-operative market share and enhancing co-operative brand awareness, is in reaching economies of scale, reducing costs and accessing new technology. Other typical outputs are positive externalities affecting the whole network: an easier access to capital, supply chain relations, and access to expert advice. All these features reduce risk for a co-operative and increase its chances for long term survival.

"Boards should include a trustee for future generations."

– Jean-Louis Bancel

The challenges that networks, federations, umbrella associations and second-tier co-operatives have to face in terms of governance are a function of the complexity of their structure. Democratic processes on such a large scale need to be carefully weighed: a delegate structure with geographic representation is often a solution. The configuration of the democratic system varies according to the type of network, but overall the key aspect is the principle of subsidiarity, where decisions are made at the lowest possible level in the hierarchy, with layers of governance - horizontal coordination type, as well as vertical consultation type^{viii}, adding some checks and balances to the system. Unsuccessful network governance is apparent when undue power is retained at the highest point in the hierarchy (e.g. board of directors). Successful network governance, on the other hand, hinges on clear accountability at all levels combined with a shared member-focused vision. Reaching this ideal is a challenge.

"Federations are a solution to deal with complexity, but they face a governance challenge. A shared view of purpose between the board and the management is required."

– Richard Lemoing

Training and Education for Good Governance

Co-operative training and education are necessary for good co-operative governance. While different co-operative types also vary in their approach to governance, they all need to have knowledgeable decision-makers - be it delegates in network structures, directors of the Board, or workers in coordination groups or Councils. Co-operatives must engage in building knowledge and developing the capacities and skills of their members, board, and staff to ensure that they are able to ask pertinent questions and tackle new or unanticipated issues with critical analysis and creative problem solving skills consistent with the co-operative model.

"Workers are represented on the Board of directors at le Group Crédit Coopératif."

An effort in fostering co-operative literacy is needed not only to build a common and shared understanding of the particular organizational

– Jean-Louis Bancel

culture that characterizes a co-operative but also to increase awareness among members and staff of the larger context of the co-operative movement. Balancing representation, a sophisticated understanding of the co-operative model, and technical expertise in governing bodies is pervasive in co-operatives.

Sharing the co-operative values is certainly the most cohesive force that brings people together in a co-operative as the 'collective problem solver'. Applying those values in a business, especially within a hostile economic and institutional environment, is not an easy task. Co-operative management education is therefore a critical component of a co-operative skill set. Education informed by the principles and values helps to ensure that co-operatives are governed and managed so as to maximize co-operation among co-operatives, build co-operative structures and larger networks that allow risk spreading, bring in outside (co-operative friendly) expertise, access patient capital, and develop other supporting institutions for a viable co-operative business.



Suma (UK) is a worker co-operative owned, controlled and operated by 120 members. Prospective members undergo a nine-month selection process before applying to become a member. The first part of the process comprises a three-month trial working in a manual warehouse. After that, potential members take part in a membership training program for a period of six months. Eventually, potential staff is assessed as collective managers and multiskilled workers. As a final stage, the SUMA membership votes to decide whether to accept new applicants.



Organic Valley is the largest co-operative of organic farmers in the United States. The co-operative has more than 1,500 members and every year it organizes a tour to farms in different parts of the country for approximately 50 member-farmers and employees. The tour, known as the "regional understanding tour", aims at creating an understanding of the various environments and challenges their members face across the country. Organic Valley believes that it is crucial for their members to build relationships, cultivating a shared sense of identity.

Some workers' and producers' co-operatives are particularly active and innovative with their training programs (see Suma and Organic Valley boxes). Member and staff training is a relevant practice for governance purposes, because it promotes the sense of the organizational culture and it teaches "how business is done in a co-operative", fostering a shared sense of identity. Training at the delegate and director level is just as critical. Some credit unions and consumer co-operatives have considerably advanced this type of training, and large co-operatives in general have the resources to develop robust in-house approaches.



NRECA

A Touchstone Energy® Cooperative

NRECA in the United States provides services to over 900 electric co-operatives and public power districts.

Governance education is an important service provided, including certificates and conferences. An effective training approach is the use of case studies where the Board of Directors engages collectively in problem solving.

Competent individuals, with the appropriate set of skills and a clear sense of the organization's purpose, are vital in order to steer the co-operative business. There are still significant gaps in training geared to the co-operative context. As a result, the sector risks adopting governance approaches that do not match the business model.



Jean-Louis Bancel with Sobey School of Business Co-operative Management Education Managing Director Karen Miner at the International Symposium.

Conclusions and Recommendations

The International Co-operative Governance Symposium provided insights into the issues of governance of co-operatives, a component of the participation theme of the ICA Blueprint.

The concept of “co-operative governance” does not result in a set of rules that can be applied in every co-operative. Governance is a process of self-defined rules influenced by the type, size, sector, geography, and “philosophy” of every co-operative. There is a common understanding, however, that co-operative governance has to permeate the entire organization and must be centered on a mutual sense of belonging, a shared identity, common shared values and meaningful participation.

In summary, during this decade of co-operation, the sector can improve co-operative governance by:

- Being critical of governance structures and processes to verify that democratic (member) control is in place. Prevent the concentration of power; delegate power and raise awareness throughout the entire organization.
- Enhancing and maintaining co-operative culture. Develop ‘symbols’ that fit the contemporary co-operative culture.
- Continuing to meet member needs. Use tools (surveys, focus groups) and technology (e.g. social media) to keep open communication with members.
- Focusing governance on long term viability as a co-operative. Ensure processes for member (user) control; sustainability; risk mitigation.
- Recognizing the need for more co-operative education and training. Connect with the educational institutions; build training programs; encourage co-operative specific education, particularly in management; invest in people; educate the community about the co-op business model.

APPENDIX A: SYMPOSIUM ATTENDEES

First Name:	Last Name:	Organization:	Job Title:	Country:
Michele	Aasgard	Alberta Community and Co-operative Association	Executive Director	Canada
Kim	Andres	Andres Consulting Inc.	President and Principal Consultant	Canada
Dan	Arnett	Central Co-op	General Manager	United States
Donna	Balkan	Canadian Co-operative Association	Communications Manager	Canada
Jean-Louis	Bancel	Credit Cooperatif	President	France
Milford	Bateman	JurajDobрила University at Pula	Visiting Professor of Economics	Croatia
Carmel	Bellamy	The Co-operators	Director, Corporate Governance	Canada
Caterina	Bettin	Saint Mary's University	PhD student	Canada
Gene	Blishen	Mount Lehman Credit Union	General Manager	Canada
Anita	Braha	Vancity Savings Credit Union	Director, Vancity Board of Directors	Canada
Karen	Brodeur	CHF Canada	Program Manager	Canada
Leslie	Brown	Mount Saint Vincent University	Professor	Canada
Bob	Cannell	SUMA Workers Cooperative	Personnel Officer	United Kingdom
Fabio	Chaddad	University of Missouri	Assistant Professor	United States
Daniel	Côté	Hautes Etudes Commerciales (HEC)	Professor	Canada
Peter	Davis	Univerity of Leicester	Professor	United Kingdom
Kathy	Day	Just Us! Coffee Roasters Co-op	Board Secretary/ Communications	Canada
Michael	Day	Just Us! Coffee Roasters Co-op	Board Chair/Systems Amin	Canada
Bill	Dobson	UFA Co-operative Ltd	Director - Chair of Governance Committee	Canada
Stephen	Dutcher	Saint Mary's University/ University of New Brunswick	Professor	Canada
Justin	Ellerby	Cape Breton University	MBA student	Canada
Hanan	El-Youssef	International Co-operative Alliance	Strategy Manager	Switzerland
Brett	Fairbairn	University of Saskatchewan	Provost and Vice-President Academic	Canada
Corina	Farbacher	Concentra Financial	Governance	Canada
Charles (Chip)	Filson	Callahan & Associates	Chairman	United States
Quintin	Fox	Gay Lea Foods Co-operative	Director, Training Development	Canada
Russell	Fralich	Saint Mary's University	Assistant Professor of Strategy	Canada
Karen	Froggatt	The Co-operative Group	National Democratic Services Manager	United Kingdom

Mark	Goehring	CDS Consulting Co-op	Board Development Team Leader	United States
Vera	Goussaert	Assiniboine Credit Union	Director	Canada
Thomas	Gray	USDA, Program on Cooperatives	Rural Sociologist	United States
Claude-André	Guillotte	IRECUS	Director	Canada
Denyse	Guy	Canadian Co-operative Association	Executive Director	Canada
Larry	Haiven	Saint Mary's University	Professor	Canada
Lou	Hammond Ketilson	Centre for the Study of Co-operatives	Director	Canada
Erin	Hancock	Canadian Co-operative Association	Manager of Research and Education	Canada
Mirren	Harris	Credit Union Central of Canada	National Product Manager, CUSOURCE	Canada
Roger	Harrop	The Co-operators	Director	Canada
John	Harvie	The Co-operators	Director	Canada
Michael	Healy	CDS Consulting Co-op	Board Development Consultant	United States
Karen	Hoffmann	Vancity Savings Credit Union	Corporate Secretary	Canada
Wendy	Holm	Saint Mary's University	Graduate Student	Canada
Peter	Hough	Canadian Worker Co-op Federation	Financial Officer	Canada
Kari	Huhtala	PI Leadership Academy	Managing Director	Finland
Siri	Jackson-Wood	Morell Consumers Cooperative/ P.E.I.C.C.	Director/Secretary	Canada
Kathy	Johnson	Johnson Shoyama Graduate School of Public Policy, University of Saskatchewan	Masters Student	Canada
Iiro	Jussila	Lappeenranta University of Technology	Professor, Management of Co-operative Enterprises	Finland
Dianne	Kelderman	NS Co-operative Council	President & CEO	Canada
Jill	Kelly	Credit Unions (retired)	General Manager (retired)	Canada
Katherine	Kitching	Measuring the Co-operative Difference Research Network	Coordinator	Canada
Alayna	Kolodziechuk	Patterson Law	Corporate/Commercial Lawyer	Canada
Réjean	Laflamme	The Co-operators	Director	Canada
Jim	Laverick	UFA Co-operatives Ltd	Chairman	Canada
Colette	Lebel	La Coop fédérée	Directrice des affaires coopératives	Canada
Leo	LeBlanc	Co-op Atlantic	VP of HR & Corp. Affairs and Corporate Secretary	Canada
Joanne	Lechasseur	Quebec 2014 International Summit of Cooperatives	Program Director	Canada

Wayne	Lee	Co-op Atlantic	Director	Canada
Paul-Emile	Légère	Co-op Atlantic	Chief Executive Officer	Canada
Bill	Legge	NS Credit Union Deposit Insurance Corporation	Director	Canada
Richard	Lemoing	The Co-operators	Chairman of the Board	Canada
Clinton	MacDonald	Federated Co- operatives Limited	Vice Chairman of the Board	Canada
Iain	Macdonald	WTM Europe	Co-operative Consultant	United Kingdom
Mary	MacDonald	Co-op Atlantic	Director	Canada
Jim	MacFarlane	The Co-operators	Director	Canada
Victoria	Mainprize	Atlantic Central	VP, Corporate Services & Corporate Secretary	Canada
Patrick	Mangan	National Rural Electric Cooperative Association	Director, Governance Education	United States
Tim	McAlpine	Mount Lehman Credit Union	Chairperson	Canada
Jerry	McGeorge	Organic Valley	Vice President, Cooperative Affairs	United States
John	McNamara	Saint Mary's University/ Union Cab of Madison Cooperative	PhD Candidate/Business Manager	United States
Natasha	McNeil	EduNova	Operations & Accounts Manager	Canada
Mary Lynn	McPherson	STRIVE!	Senior Consultant	Canada
Karen	Miner	Saint Mary's University	Managing Director	Canada
Andy	Morrison	Arctic Co-operatives Limited	CEO	Canada
Linda	Moulin	Affinity Credit Union	Chief Governance Officer	Canada
Carol	Murray	BC Co-op Association	Executive Director	Canada
Sonja	Novkovic	Saint Mary's University	Professor	Canada
Anne	O'Neil	Stockton, Maxwell & Elliott	Lawyer	Canada
Edward	Parker	The Midcounties Co- operative	Secretary & Head of Governance	United Kingdom
Paul	Paruch	Atlantic Central	VP, Business Solutions	Canada
Emma	Patterson Taylor	SAOS (Scottish Agricultural Organisation Society)	Project Manager	United Kingdom
Alex	Penner	Mount Lehman Credit Union	Director	Canada
Carol	Pettigrew	NS Credit Union Deposit Insurance Corporation	Director	Canada
Darryl	Reed	York University	Associate Professor	Canada
Daphne	Rixon	Saint Mary's University	Associate Professor	Canada
Willy	Robinson	iNova Credit Union	General Manager	Canada
Sheldon	Salino	Cipriani College of Labour and Cooperative Studies	Senior Lecturer	Trinidad and Tobago

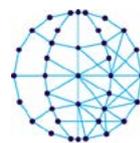
Marilyn	Scholl	CDS Consulting Co-op	Manager	United States
Art	Sherwood	CDS Consulting Co-op	Board Development Consultant	United States
Sonia	Smith	Dept of Co-operatives & Friendly Societies	Head of Inspectorate	Jamaica
Ryszard	Stocki	University of Social Sciences and Humanities, Faculty in Katowice and Wojtyla Institute	Professor	Poland
Joel	Stoddart	Careforce Home Health Services	Business Development Manager	Canada
Ron	Stockton	Stockton, Maxwell & Elliott	Lawyer	Canada
Raymond	Surette	Atlantic Central	Board of Director	Canada
Rolf	Traichel	Federated Co-operatives Limited	Director	Canada
Glen	Tully	Federated Co-operatives Limited	President of the Board	Canada
Debbie	Wallace	Industry Canada	Manager, Policy, Analysis & Intelligence	Canada
Jim	Watt	UFA Co-operators Ltd	Chief Governance Officer	Canada
Anthony	White	Hanover Consumer Cooperative Society	Director of Operations	United States
Kent	Williams	Royal Roads University	Doctoral Fellow	Canada
Rod	Wilson	Arctic Co-operatives Limited	Vice President	Canada
Stephen	Young	SAOS (Scottish Agricultural Organisation Society)	Project Manager	United Kingdom
Robert	Yuill	SAOS (Scottish Agricultural Organisation Society)	Deputy CEO	United Kingdom

Footnotes

- i. ICA Blueprint, 2012.<http://ica.coop/en/blueprint>
- ii. The Worldwatch Institute, Vital Signs publication, 22/2/2012 <http://www.worldwatch.org/>
- iii. ICA, 2010 <http://ica.coop/>
- iv. Birchall, J. and L. Hammond Ketilson(2009).Resilience of the Co-operative Business Model in Times of Crisis, International Labour Office, Geneva
Birchall, J. (2013). Resilience in a downturn: The power of financial cooperatives. International Labour Office, Geneva
- v. UN Resolution 64/136. <http://www.copac.coop/publications/un/a66136e.pdf>
- vi. McShane, S. L. and Steen, S. (2009) Canadian Organizational Behaviour, 7th Ed, Toronto: McGraw-Hill Ryerson
- vii. MacPherson, I. (2003). Encouraging Associative Intelligence: Co-operatives, shared Learning and Responsible Citizenship, Co-operative Learning and Responsible Citizenship in the 21st Century, Manchester Co-operative College, pp. 11-19.
- viii. Members of large networks continue to make independent decisions at the operational level - coordination of activities between different segments in the organization is one layer of decision-making. Consultation or the advisory role typically includes one level up (eg. Second tier cooperative serving as advisor to the Boards of directors of primary co-ops).



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