

## Co-operative Leadership Behaviour: Pathway Towards Co-operative Identity at the Co-operators Group Limited

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**Abstract:** This paper examines what co-operative values-based leadership looks like at the Co-operators Group Limited (CGL) and considers the need to increase this behaviour. It is set within the context of the global stage and the international co-operative desire to increase their contribution towards unmet economic social and environmental international needs. The paper focuses on CGL as it strives to strengthen co-operative identity. Opportunities to further grow co-operative identity within CGL are examined through the identification and development of co-operative value-based leadership competency. Co-operative leadership competency is relevant to management performance at CGL and is explored as a benefit towards successful strategic implementations.

The critical role of all people leaders within CGL in the strategic achievement of co-operative identity is reviewed in terms of leadership actions as a driving force of strategic success.

This paper provides internal and external research and analysis that takes theoretical ideals towards practical application of co-operative identity within CGL. Utilization of the Statement of Co-operative Identity as the compass which can effectively map leadership behaviours to co-operative principles and values is a foundational component of this review.

CGL's current competency model and support mechanisms are reviewed and it is demonstrated how co-operative leadership competency could be presented and embedded in the organization.

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**Keywords:** co-operative identity, values-based leadership, co-operative leadership behaviour, co-operative leadership competency, Co-operators Group Limited (CGL)

### The Global Co-operative Context

Globally the market driven economy is leaving many countries and people behind, creating an increasingly unequal equation and causing large scale human injustice as well as global distrust and unrest.

Co-operatives contribute strong economic, social and environmental results globally and the co-operative business model applies a broader disbursement of benefits creating more equality within society. The co-operative business model has a unified purpose that builds stronger societies. Robert Shiller, professor of economics at Yale University sees the co-operative movement as an essential innovation to achieve a society in which people are prioritized (Simon, 2014).

Co-operative identity goes beyond a business model to demonstrate unique character and behaviour that is built from co-operative values and principles. Collective co-operative identity is at the center of the five themes contained in the ICA Blueprint for a Co-operative Decade (2013). The Blueprint puts forth that "there must be clarity as to how co-operatives are to be defined and distinguished. This is important for the co-operative sector itself, in creating a powerful sense of shared identity" (ICA, 2013, p. 20). The basis of this paper is that the shared identity is developed by acting on co-operative values and principles as found in the ICA Statement of Co-operative Identity (ICA, 2015a).

The global co-operative movement will be ignited through fully actualizing co-operative identity within each and every co-operative sector, and through the actions of each co-operative member and stakeholder.

### Introduction to CGL (The Co-operators)

CGL (Co-operators Group Limited) originated in 1945 when a small group of prairie farmers came together to meet their collective insurance needs. Today CGL is a co-operative which comprises a holding company (Co-operators Financial Services Limited) and owns a series of insurance companies. These insurance companies sell financial and insurance products in the Canadian market. CGL is co-operatively owned by 43 co-operative member owners.

These member owners are located across Canada and represent a significant portion of the Canadian co-operative economy covering a variety of business, agriculture, and service sectors.

As summarized in the 2014 Sustainability Report (CGL, 2015b), CGL handles a complex portfolio of assets totalling more than \$35 billion. Their business profile (p. 9) includes details of the significant financial scope of this organization. CGL's organizational chart (p. 9) demonstrates the various insurance companies operating under this co-operative ownership model. In Canada co-operatives cannot legally sell insurance, resulting in this structure of insurance companies owned by CGL. They employ over 4,300 staff with a distribution network of close to 500 exclusive financial advisors distributing insurance and financial products throughout Canada.

Within their structure today, most clients and all employees are not member owners. From a co-operative perspective, this creates unique relational challenges with critical stakeholders in areas of co-operative understanding and engagement.

CGL is connected to the global co-operative movement and their CEO Kathy Bardswick is an active member on the international stage promoting co-operation. Co-operative identity at CGL is important in the fulfillment of their purpose to provide "financial security for Canadians and their communities" (CGL, 2015b, inside front cover), as well living their stated value to "give life to co-operative principles and values" (CGL, 2015b, inside front cover). In their vision CGL aspires to be a "catalyst for a sustainable society" (CGL, 2015b, inside front cover) as well as leading the insurance industry through its "co-operative character" (CGL, 2015b, inside front cover). These components and the introduction of their new strategic focus on co-operative identity bring forth an increased need to instill and embed co-operative identity more predominately within their leadership population. This focus aligns with the unified global purpose of co-operation through a shared and active co-operative identity.

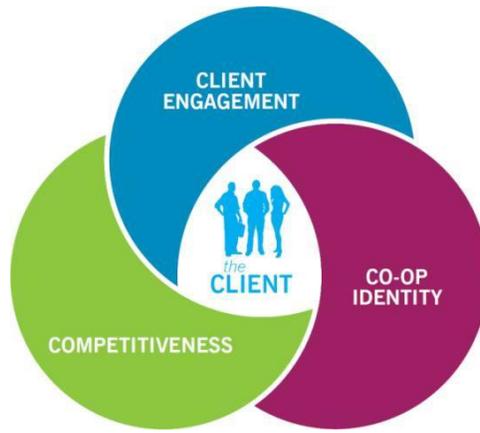
Since its early beginnings, CGL has taken strong action based on the values and principles of co-operation and has delivered on these commitments. Their stewardship and leadership have been recognized for: co-operative identity, business practices, sustainability programs, HR programs and service delivery to members and consumers. CGL receives strong external recognition (CGL, 2015), which demonstrates the strong co-operative orientation that flourishes today in their actions and culture. The CGL governance model is executed within the framework of co-operative identity upholding co-operative principles and values. They exceed industry trust levels in the research of J.D. Power (CGL, 2015b, p. 24).

### CGL's 2015-2018 Strategic Plans

The Canadian insurance market is the setting of CGL's 2015-2018 strategy. It is one where "heightened consumer expectations and emerging technological capabilities" (Co-operators, 2015) present challenges for providers of service experiences. It is a complex and competitive market where consumers are more informed and demanding in terms of value, convenience and ethical behaviour of businesses. In this context it is important for CGL to leverage their "differentiation as a co-operative financial services provider" (Co-operators, 2015) as a path to competitive advantage and stronger market position. The 2015-2018 strategy takes CGL further on their journey of co-operative identity and advances the co-operative lens in terms of their insurance product and service offerings.

*2015-2018 Strategic Focus: (Client Engagement, Competitiveness and Co-operative Identity)*

**Figure 1: Strategic Priorities**



A challenging objective has been set around Client Engagement in the strategy, with a target that “The Co-operators will be THE industry leader in client engagement (interactions and solutions)” (CGL, 2015a).

In the insurance industry competitiveness is a critical factor in market success. The strategic Competitive objective is that “The Co-operators will enhance its competitive position in the marketplace allowing it to grow profitably and capture market share” (CGL, 2015a).

In terms of leveraging their Co-operative Identity a third objective states, “The Co-operators will demonstrate commitment to bringing the co-operative principles to life; addressing the economic, environmental and social needs of Canadians and their communities” (CGL, 2015a).

**Goals Supporting the Strategy**

- To become the insurer of choice for co-operative and community minded organizations.
- To embed co-operative and sustainable principles in actions and decision making. This will be exemplified by “deliberate efforts to consciously address the economic, environmental and social needs of Canadians and their communities” (Co- operators, 2015).
- To provide further education for Canadians on the vulnerabilities to their financial security.
- To act and advocate for the protection of unmet safety risks and financial exposures facing Canadians.

For many years CGL has had strong and intensive sustainability focus and results as detailed in the 2014 Sustainability Report (CGL, 2015b) by the list of sustainability-focused products and services (p. AP-3) and the highlights of the 2011-2014 sustainability strategy (p. 6). There has been great success in maturing plans and improving influence on social, economic and environmental areas. Within the new strategy, the sustainability policy (CGL, 2015b, inside back cover) is maintained; however, it is now more accurately placed within the strategic focus of co-operative identity.

**Leadership Orientation**

It is recognized by senior leaders that the 2015-2018 strategy evolves within an internal “culture of high performance” (CGL, 2015a) with “a strong, motivated and resilient workforce” (CGL, 2015a) led by an “empowered leadership team” (CGL, 2015a). It is the empowerment of the leaders most specifically towards the objective of co-operative identity that is the focus of this paper.

CGL's leaders are accountable for the implementation of the new strategy within their respective functional teams. R. L. Daft (1999) in "Moral Leadership, Leadership Theory and Practice", underlines the importance of strong leadership to implementing strategy because leaders demonstrate and inspire others to follow the required behaviours. Co-operative values-based action by leaders could increase the adoption of co-operative behaviour for CGL stakeholders and enhance the delivery of the stated strategic objectives.

This paper centers on what co-operative leadership looks like at CGL today, asking if more of this behaviour by leaders is desired? If so, what value would it bring? How this could be managed and supported is also explored.

Within CGL's insurance companies there are over 1,000 people leaders, defined by Nancy Rooney (personal interview. May 4, 2015), Director of Organizational Development, as individuals who "are responsible for others and have direct reports". Most of these leaders are in roles that do not require them to interact with the membership or the governance of the co-operative. This leaves them less informed on the co-operative business model and the associated application of principles and values of co-operation. It is this group that is the target audience of the research and development within this paper, due to this gap in the direct co-operative exposure within their specific roles. There is opportunity to further engage people leaders in co-operative leadership behaviour.

### The Statement of Co-operative Identity

In May 2015 while speaking at the ICA Research Conference in Paris, Bruno Roelants (2015), Secretary General of CICOPA (International organization of industrial and service co-operatives), spoke of the Statement of Co-operative Identity as guiding co-operatives and added that the principles and values make co-operatives unique. According to Mr. Roelants, the co-operative principles are an advantage that enables co-operatives to define their difference in the market. It is through aligning these principles and values to what co-operative leaders say and do that we can build shared co-operative identity. Leadership that aligns to the principles creates clarity and practical application of co-operative identity.

Below are some current examples of active co-operative identity that demonstrate alignment of the statement of co-operative identity to organizational behaviour at CGL:

- Strong commitment to co-operative principles and values and the global co-operative sector. (Principle 6 – Co-operation)
- Strives to be the chosen insurance provider to meet the needs of members, community organizations and co-operative organizations. (Principles 6/7- Co-operation/Community)
- Provides awareness and education for Canadians in terms of their financial security. (Principle 5- Education)
- Advocates for the financial security of Canadians. (Values and Principle 7- Community)
- Openly discusses, partners with others and explores solutions to meet uninsured needs for Canadians, exemplified by CGL's flood initiative. (Values and Principle 7- Community)
- Open to insure all Canadians coast to coast. (Principle 1- Open/Voluntary)
- Democratic control, ownership, governance and strategic direction by the co-operative member owners. (Principals 1, 2, 3, 4 – Open/ Democratic/ Economic/ Autonomy)
- Annual employee engagement surveys and action plans to improve working environments within CGL. (Values and Principles 2, 4 – Democratic/Autonomy)
- Strongly recognized results and continued focus on sustainability with a long-term sustainability strategy. (Values/ Principle 7 - Community)

Professor Peter Davis (1995) suggests that integrating co-operative values and principles can differentiate co-operative management culture from general management culture. CGL leaders require practical guidance to help them align what they are required to do and say in the execution of their roles, with the Statement of Co-operative Identity. Leaders require support and direction to ensure they are equipped to implement the changes needed for co-operative strategic success. The International Co-operative Alliance in a recent draft of the guidance notes (ICA, 2015b) relating to the Statement of Co-operative Identity stated that "if all the principles are observed and applied

in the day to operations of a co-operative enterprise, that co-operative enterprise will be stronger and more sustainable” (p.2).

### Co-operative Leadership a Strategic Imperative

With many definitions of leadership in existence we consider that co-operative managers must recognize their leadership role as one of servant-leader - their source of legitimization comes from the co-operative purpose rather than from their knowledge or position. This is true when we consider CGL’s goal around co-operative identity as the identity strongly exists in their culture already; it is a matter of reinvigorating it to fit in the new context of the 2015-2018 strategy.

When considering leadership behaviour, Henry Mintzberg, in his 2013 publication *Rebuilding American Enterprise*, makes the statement that “leadership is about sending signals that engage people in the enterprise” (para. 29). Overall, when we look at leadership definitions there are three key broad components that stand out from research such as the work of Peter Northouse shown in the chart below. Leaders have the ability to create vision and to influence and motivate others towards the vision.

**Figure 2: Components of Leadership**



(Northouse, 2007, p. 10)

CGL people leaders play a critical role in influencing and motivating stakeholders in the delivery of the newly focused co-operative identity strategy. In fact, all new strategies require the readiness of the internal leadership. The preparedness of CGL people leaders to deliver on the three co-operative pillars of economic, social and environmental success will directly impact results. Co-operative identity, including the values and principles, upholds many pieces of leadership competency in terms of relevance to strategic success. This focus on co-operative leadership is not meant to downplay the importance of other core leadership competencies, but rather expand them towards co-operative aspects.

Professor Davis (1995) has indicated in “Co-operative Management and Co-operative Purpose: Values, Principles and Objective for Co-operatives into the 21st Century” that the quality of their management is a critical factor for co-operatives to achieve their social and economic goals in the modern commercial context. Additionally, Daft (1999) reinforces the contribution leaders make to an ethical organizational culture through modelling the behaviour. Effective leadership behaviour ensures strategic success and therefore it is appropriate to focus intentionally on the preparedness of CGL’s people leaders in terms of achieving co-operative identity.

## Competency Models Drive Performance

Today at CGL a competency model is utilized to define the desired performance behaviours of all employees including people leaders. It follows that embedding more co-operative behaviour in this model could be advantageous to growing co-operative identity.

Coro Strandberg is a consultant who offers strategic counselling and support to organizations interested in advancing sustainability (Strandberg, 2015a). In her report (2015b), *Sustainability Talent Management: The New Business Imperative*, she suggests that retooling talent management systems will position firms for future success and that one of the effective ways to do this is to utilize competency models that incorporate the desired knowledge, skills and behaviour. Ms. Strandberg explains that competency models are key to managing top talent. She indicates they can set performance and behavioural expectations that are needed to deliver the mission and vision of organizations and achieve business goals. The use of competency models is widespread beyond their application at CGL and it is in that business context that CGL had a few years back implemented this standard HR practice.

The following definition of competency is taken from CGL's competency model:

*Competencies include both technical knowledge/skills as well as behavioural characteristics. The focus of this document will be behavioural competencies: Any motive, attitude, behaviour or other personal characteristic that is critical to success and differentiates outstanding performance. (CGL, 2013)*

At CGL there are eight identified core competencies applicable for all employees to build the performance behaviours needed to achieve successful business results. They include: Achievement Focus, Communication, Flexibility, Organizational Commitment, Client Focus, Teamwork & Relationships, Problem Solving and Effective Decision Making. These competencies are the foundation to “develop the direction and the goals for many people practices” (CGL, 2013). These core capacities are typically reviewed when an organizational shift in strategic direction occurs as they provide direction on how to achieve strategic imperatives in terms of behavioural expectations. Competency models support many Human Resource practices. CGL's model is applied as follows:

*Competencies define the behavioural expectations that are critical to drive performance. Once competencies are identified they can be used to ensure consistent criteria are used to:*

- *Make a recruitment or selection decision;*
- *Create a training and development plan;*
- *Assess someone's performance; or*
- *Promote or assign someone to a new role. (CGL, 2013)*

Currently there are no specific co-operative behaviours, principles or values listed within the core competency model. The competencies in the model can be aligned towards aspects of co-operative identity. An example would be that effective communication skills for leaders are needed to create cohesion with stakeholders. Nancy Rooney (personal interview, May 4, 2015), Director of Organizational Development, shared that these current competencies were intentionally set with co-operative principles and values being “top of mind in the formulation of the competencies”. She noted the intentional approach was to “weave the values and co-operative approach into the content” of the current model. The competencies are therefore more implicit rather than explicit when referencing the ICA Statement of Co-operative Identity. Ms. Rooney also shared that CGL has recently engaged in a competency review directly related to the new strategy and “it is being considered to do something more specific in the new version” of the performance competency model.

In addition to this core competency model, CGL has defined further leadership competencies for people leaders. The current leadership competencies are:

- Leading and Developing Others
- Leading Change
- Strategic Business Sense

The intention of these leadership-specific competencies is to “depict competencies/behaviours which are primarily relevant to people leaders” (CGL, 2013). The aspects of developing others and building strategic business knowledge align strongly with the co-operative principle of education. Within these leader competencies there are references to “understanding the co-operative business model” (CGL, 2013) and working “within a co-operative environment” (CGL, 2013). Additional requirements around co-operative values, community and social responsibility are mentioned. This paper examines the benefit of embedding an explicit competency of co-operative leadership within the model and clearly articulating what co-operative leadership behaviour is in terms of values, knowledge and action.

Reference to the Statement of Co-operative Identity is lacking in the current competency model. There is opportunity to create further awareness and understanding of the practical application of co-operative principles and values through enhancement of the competencies.

The model is currently under review with the intent to incorporate competencies that increase the opportunities for leadership behaviour to support the delivery of the 2015 -2018 strategic goals.

### **Existing Research: Challenges, Gaps and Opportunity for CGL’s Co-operative Identity**

#### ***Co-operative Identity and Performance Project Report***

In 2013 an internal analysis was completed on the state of CGL’s co-operative identity in preparation for the new strategic direction. The analysis was completed by Peter Clarke, Manager, Co-operative Identity and Performance, and is summarized below.

A key finding of Clarke’s (2014) analysis was that “embedment and execution of the co-operative identity is not consistent throughout the organization”. There is an inconsistency that will make it “difficult to have the client-centric perspective required” for successful engagement with clients and the desired results. Consequences of inaction add risk to the success of the strategy and lost market opportunity of leveraging co-operative identity. Mr. Clarke noted that his research found “ample evidence that other social and environmental criteria are playing a more significant role in the consumer decision making processes”, thus adding urgency to the market benefits of more fully developing CGL’s co-operative advantage.

Additionally, Mr. Clarke determined that “the Co-operators’ leaders and staff must have a shared and unified understanding about what it means to be a co-operative” (Clarke, 2014) in order for CGL to be able to leverage this strength. His recommendation called for “significant emphasis on greater leadership and embedment, internally and externally as in enhanced training and education, to apply the co-operative lens through all operations and to develop mechanisms for measuring progress towards embedment”. One of his key recommendations focused on leadership and embedment stating, “we must insure that people leaders understand contextually the consistent, formalized, systemic, measureable, relevant and sustainable application of the co-op lens”. It is through “common understanding of what it means for us to be a co-operative, and a specific understanding about the application of that” that the achievement of co-operative identity will grow, develop and evolve. In conclusion, he pointed out that “we must help our leaders explore the issue, enable discussion and generate the meanings of our identity”.

Clarke’s work shows the gaps CGL faces in moving the new strategy forward and points to the critical role of leaders across the organization in terms of the delivery of this strategy. Supporting and preparing leaders is foundational to the overall successful implementation of the new strategy and in particular the co-operative identity objective in light of his findings.

***The Co-operators Case Study, prepared by Professor Daniel Côté***

In 2014, CGL requested and participated in a strategic CGL based study by Professor Daniel Côté to evaluate co-operative management training. He assessed the Saint Mary's University Masters Management, Co-operatives and Credit Union program and the resulting impact on the performance of students. The study enabled Professor Côté to take a rare look at the principle of co-operative education in the context of manager training and the resulting behaviour-based outcomes. The research shines a light on the co-operative difference and complexity in managing an organization (Côté, 2014) as seen from within CGL. It provides evidence that co-operative education and knowledge impacts the co-operative aspects of leadership behaviour.

The study found that the co-operative management training at Saint Mary's improved co-operative understanding including that of the principles and values of co-operation and led to the behavioural changes identified below.

As part of their education the students learned that they are part of a global movement (Côté, 2014). This brings forth intrinsic connection for the individuals and increases their capacity to advocate for the co-operative model, which supports the purpose of the co-operative movement and in particular Principle 6 of the Statement of Co-operative Identity. Co-operatives desire such behaviour in their managers. Strengthening the leader's ability to communicate effectively on co-operative principles and values is an asset for co-operatives.

In terms of applying a co-operative mindset, Professor Côté (2014) found that after completing the learning, individuals were able to apply a co-operative approach to business, which supported an increase in ethical behaviour as well as the confidence to express co-operative principles.

Additionally, these individuals increased their strategic thinking ability (Côté, 2014). Today's world is complex, and this behaviour change supports more co-operative alignment in decision making. Although linked to co-operative action, this increase in strategic perception will be beneficial in broader leadership application.

In summary this case study demonstrated that increasing co-operative knowledge and understanding leads to an increased capacity to reflect and engage with the co-operative difference (Côté, 2014) for the leaders that completed the Saint Mary's Master's program.

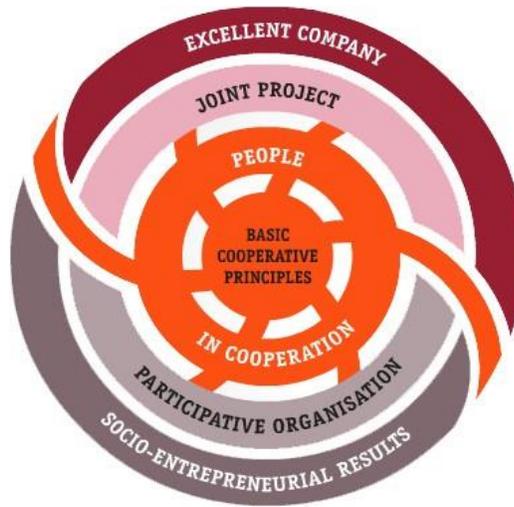
### **Co-operative Leadership Outside of CGL**

External organizations have much to offer CGL from their experiences and success.

***Mondragon Cooperative Corporation (MCC)***

Mondragon Co-operative Corporation in Spain demonstrates active awareness of co-operative principles and values throughout their people, processes and performance. To achieve this culture, they apply co-operative "principles and values through a Management Model as a competitive advantage" (Mondragon, 2012, p. 6). The model develops leaders' understanding and provides direction on how the principles are "implemented in day-to-day management" (Mondragon, 2012, p. 9).

Figure 3: MCC Corporate Management Model



(Mondragon, 2012, p. 13)

Additional to the model, MCC's "Cooperative Leadership Programme" (Otalora, 2015) provides training on behaviours to enable leaders to fulfill the expectation that they will be "a beacon of cooperative conduct" (Mondragon, 2012, p. 28). During a 2014 MMCCU study tour, workers and managers shared that it is challenging to deliver on the principles and values; however, they are committed to honouring them. They have a strong ability to make collective decisions, support co-operation, listen well, and innovate and they set targets around increased autonomy of their workers.

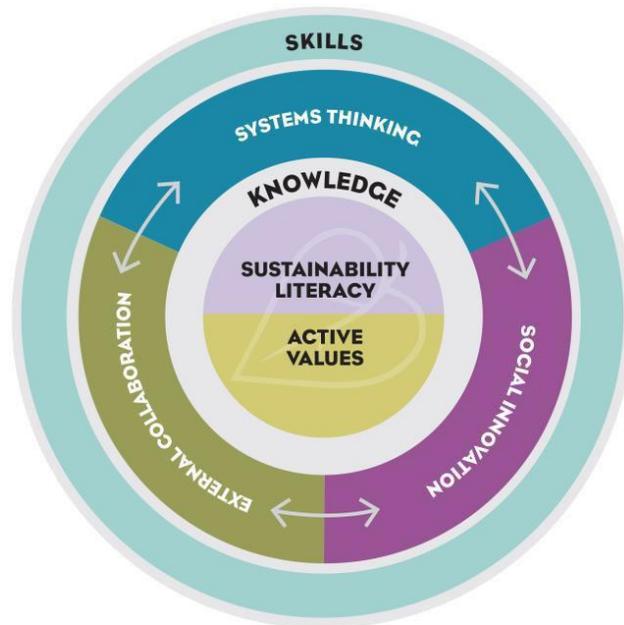
#### *Vancity Credit Union*

Based in British Columbia, Canada, Vancity Credit Union, has an interesting approach on leadership behaviour that is quite different from that of MCC. Eric Bulmash, Manager of Leadership and Learning in the People Solutions department with Vancity, provided insight in an interview on May 1, 2015. He explained that Vancity doesn't have a specific or comprehensive competency model around Co-operative behaviour for leaders. They focus instead on recruitment of individuals with values that resonate with co-operative values and principles. Once hired, Vancity's extensive training/onboarding program takes over and they introduce behaviour expectations. Key leadership competencies such as, "Relevant and Connected", "Committed to our Collective Success" and "Confident" align with co-operative principles and values. They "set the tone of co-operation" according to Mr. Bulmash. Documentation provides clarity about what the competency behaviour is and is not, guiding understanding and practical application of the competency as well as performance expectations.

#### *Sustainability Talent Management: The New Business Imperative by Coro Strandberg*

Funded by Servus Credit Union and Assiniboine Credit Union, Coro Strandberg (2015b) compiled a report which delivers "Five Sustainability Leadership Competencies". The definition of sustainability put forth in her work "includes social and environmental considerations in business" (Strandberg, 2015b, p. 5). CGL approaches co-operative identity with the full embedment of sustainability making this research relevant to the broader topic of co-operative leadership competency at CGL.

**Figure 4: Five Sustainability Leadership Competencies**



(Strandberg, Sustainability Talent Management: The New Business Imperative, 2015)

Together the five competencies – Systems thinking, External collaboration, Social innovation, Sustainability literacy and Active values - build strong leadership qualities and skills to enable future sustainable and commercial success.

#### *Professor Tom Webb Interview*

Professor Tom Webb, Saint Mary's University Co-operative Education Program, was interviewed for this research (June 4, 2015). Drawing on extensive academic and business experience and achievements in the co-operative sector, Professor Webb shared that co-operative leaders keep principles and values at the forefront of operations and decision making. He said that leaders behaving co-operatively will be driven by the question, "what is different" because of the principles and values? They will refer to the Statement of Identity and ask, "if we really believe that, what would we do differently?". Co-operative leaders would treat every stakeholder equally and make "tough clear choices that are co-operative value based".

During the interview, Professor Webb stressed the "need to be able to measure how successfully co-operative purpose, values and principles have been integrated into the daily operations of the co-operative.". His recommended tool is the Co-operative Index developed by a Saint Mary's University team. The CoopIndex, which has been used by Mondragon and North American co-operatives, is a tool for measuring performance in relation to co-operative identity. It helps co-operatives maintain and strengthen their competitive advantage as co-operatives (Stocki et al, 2012). Modification and implementation of this tool for CGL were also recommended by Peter Clarke (2014) in his report.

#### *Key findings from external research*

- MCC's example successfully integrates co-operative identity focus for leaders and demonstrates that commitment and integrity with the Statement of Co-operative Identity are critical.
- Vancity successfully demonstrates the ability to focus on collective success through co-operative values based recruitment and employee on-boarding.
- Coro Strandberg's five competencies provide a comprehensive framework that is directly transferrable and applicable to co-operative leadership competency at CGL.

- Co-operative behaviour would involve regularly asking the question Tom Webb put forth, “if we believe that, what are we doing differently?” (Webb, 2015).
- Measurement of co-operative leadership behaviour and identity is critically important.

### Independent Research, Methodology and Results

The primary research for this paper was a survey with both qualitative and quantitative components. The survey requested empirical information and data from CGL respondents.

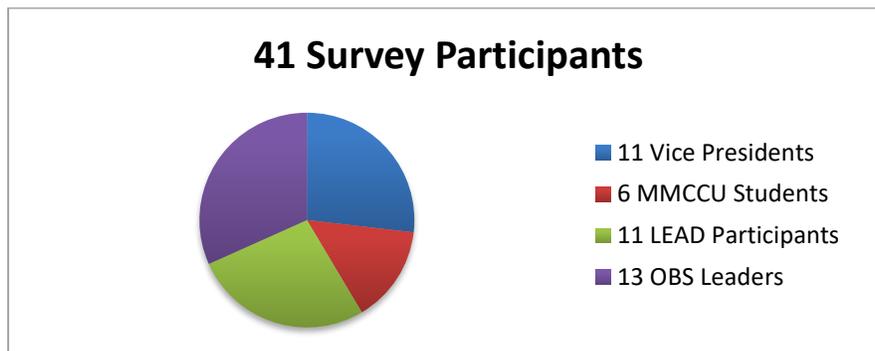
Additionally, interviews of key stakeholders were conducted to provide background and develop recommendations.

The survey consisted of ten questions that focused on:

- Co-operative based leadership behaviour described in terms of active evidence and reflective ideas.
- Assessment of the need for more co-operative value-based leadership behaviour at CGL.
- Ideas and suggestions on what types of action would promote co-operative leadership based behaviour further.
- Self assessed knowledge levels of the Statement of Co-operative Identity for the participants, groups and the organization.

There were four groups of participants included in the survey (Figure 5) and all are currently employed by one of CGL’s insurance companies.

Figure 5: Survey Participants

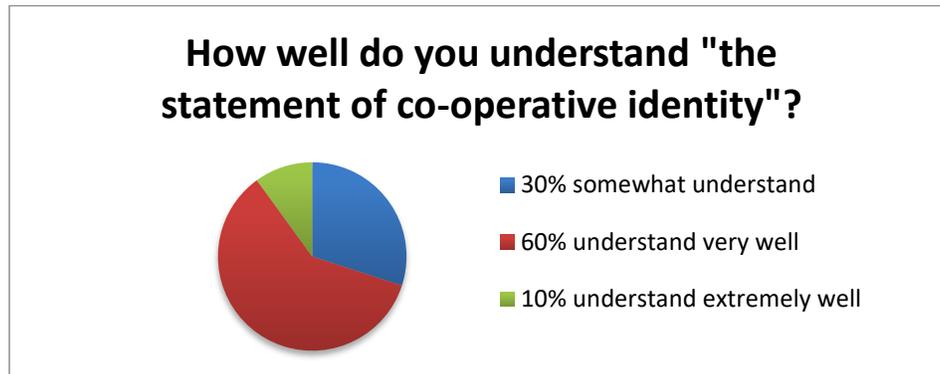


The survey participants were selected to collect a wide view of feedback and included all leadership levels from senior leaders to supervisors. Students and graduates of the Saint Mary’s University Master’s program (MMCCU) contributed their informed ideas and input. There was strong participation from the newest group of LEAD (CGL’s corporate management training program) participants, who are leaders identified with strong future potential. The OBS (Operations Business Solutions) leaders are from a client service area within CGL. This group has participated in some intentional learning focused on the Statement of Co-operative Identity. Each group has been given equal weighting in the roll up calculations of the survey. The survey was distributed to approximately 135 individuals and 41 completed the survey, at a 30% participation rate overall. Participation was voluntary.

**Comment:** The focus of survey participants was leaders within CGL. It is possible that input from wider groups could vary results. A further study focusing on followers versus leaders would be interesting future research for CGL. The highest participation rate of 56% was OBS leaders, likely related to their recent session on co-operative identity. Closely following the OBS group was the LEAD participants who are an engaged group of present and future leaders. The lowest participation rate was in the executive or VP group with 16% completing the survey. This is another area for future consideration or research. Participation rates could be driven by the timing of the request. It is noteworthy that 30% of the MMCCU group completed the survey.

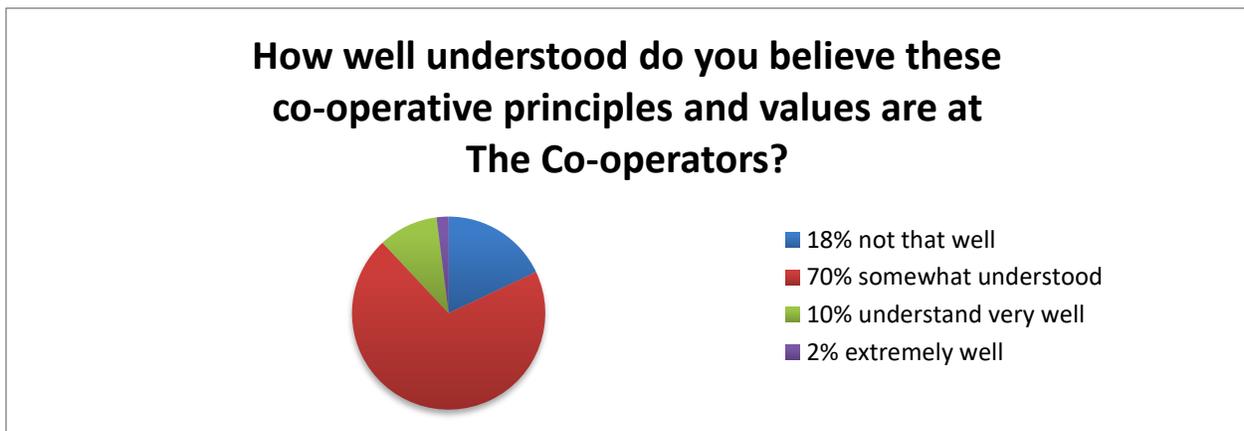
Quantifiable Results

Figure 6: Understanding Co-operative Identity



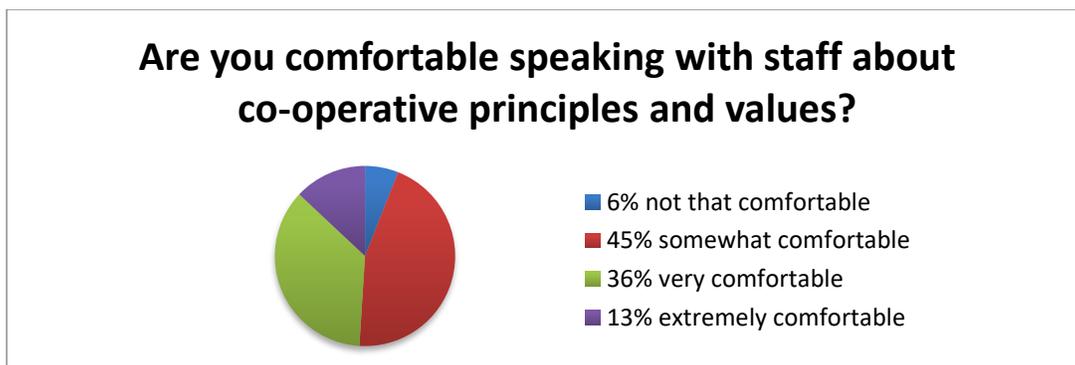
**Comment:** The results indicate a good level of understanding within the pool of survey participants. This is encouraging in terms of the awareness levels leaders have of the Statement of Co-operative Identity.

Figure 7: Co-operative Principles and Values at The Co-operators



**Comment:** It is interesting that the participants indicate less understanding in the general staff population than they have themselves. 88% of respondents rate knowledge at the CGL at somewhat or lower compared to the 30% self-rating in the previous question. Could this mean more focus is required beyond the leadership level? Again, this aspect could be reviewed in future research.

Figure 8: Communicating Co-operative Principles and Values



**Comment:** This question targets one of the main behaviours of a co-operative leader, which is communicating about co-operative components with staff members. It is noteworthy that 51% responded that they are somewhat or less comfortable to speak on this topic. The highest scores on this question come from the MMCCU group with 86% being very or extremely comfortable speaking about co-operative principles and values. The lowest comfort level group was the OBS group with 69% rating themselves as not well to somewhat comfortable. This could be because more mid-level people leaders are contained in that group. The results leave a question, why, if leaders understand the statement, do they not feel comfortable talking about it?

**Figure 9: Need for More Co-operative Values Based Behaviour by Leaders**



**Comment:** There is strong agreement, with 77.5% of respondents indicating that more co-operative leadership behaviour is needed. The results for these last two questions indicate need for more co-operative values-based behaviour by CGL leaders.

#### Key observations from quantitative results

- There is fairly strong knowledge within some groups of leaders at CGL. Many examples were provided of co-operative leadership behaviour in action.
- Leaders need more comfort with the Statement of Co-operative Identity to increase their comfort in speaking about it.
- A majority of respondents (77.5%) indicate that more co-operative leadership behaviour is needed at CGL.
- Across the groups of respondents there were some striking response variables: MMCCU students were personally most comfortable with and knowledgeable about the statement and also rated the understanding within the organization at the lowest level of any group. This result confirms the finding of Professor Côté (2014) that knowledge develops understanding and results in co-operative behaviour changes. With their strong knowledge and comfort in speaking about co-operative principles and values, the MMCCU group has much to offer CGL on their co-operative identity journey. It can be fairly stated that this group has the most co-operative knowledge and therefore perhaps more weight should be applied to their responses. That approach was not taken in summarizing these results; however, further reflection on this component of the research may add value when establishing action plans.

#### Qualitative Results

There are three dominant feedback areas on Co-operative Leadership Behaviour (CLB) from the qualitative survey questions (What CLB is; How to increase CLB; Why CLB is valuable). These are summarized below from the information respondents provided with consideration given to the frequency and relevance of their comments.

### What Co-operative Leadership Behaviour (CLB) Looks Like

The definition of behaviour is “the way in which one acts or conducts oneself” (Google, 2016), thus it is the intentional action that leaders take in terms of the Statement of Co-operative Identity that we are talking about. It is through action that successful achievements are accomplished.

Respondents described what CLB looks like and their comments are grouped into four key practical areas where co-operative values based action by leaders was identified. These areas were presented by multiple respondents with value placed on the frequency that the behaviour is mentioned. These behaviours are interconnected much as the principles and values are interwoven and interdependent to and with each other.

1. Co-operative Communication: best described as actively talking about co-operative principles and values and identifying linkages to actions within communications. This includes openly sharing both personal and business actions that align to co-operation with key stakeholders.
2. Service to People: includes listening, involving, informing, responding, developing relationships with internal and external stakeholders. This leadership approach is about service to people (clients, employees, members etc.). Consideration of all current and future stakeholders is included.
3. Co-operative Decision Making/Collaboration: involves applying the principles and values of co-operation in decision making. Directly tied to active communication it is critical that decisions be linked to co-operative principles and values. To be effective in the world today decisions must provide collaborative solutions to address the extreme challenges facing this planet and its people. This involves striving to generate collaboration, and synergy across communities, teams and functions will drive solutions that rise to economic, environmental and societal challenges.
4. Co-operation Avocation: leaders actively engaged, knowledgeable and making positive contributions in their community, participating and promoting the co-operative movement and supporting environmental sustainability.

The survey respondents spoke to sustainable action, including “walking the talk” of social, economic and environmental objectives. Since CGL has recently embedded sustainability into their strategy of co-operative identity, a separate survey question was presented asking how “being a catalyst for a sustainable society” is demonstrated by leaders. Answers ranged from sustainable products and services to the behavioural components this paper focuses on. Behaviours described were: being active in communities; joining and supporting co-operatives; being person centered; learning to collaborate externally; making forward thinking decisions; and noting the success of “our co-operative identity that got us to where we are today”. The answers from this question confirm that leaders see sustainable action as being embedded in co-operative identity. These sustainable actions are encompassed in the four behaviour groupings above.

### How to Increase Co-operative Leadership Behaviour

Participants put forth interesting and creative approaches that will drive increases of co-operative leadership behaviour at CGL.

1. Build explicit accountability of this behaviour into HR programs (recruitment, performance management, competency model, compensation, bonus programs and recognition awards).
2. Heightened communication around co-operativism and leadership expectations. Focused and frequent communication on co-operative identity. Providing practical examples to assist leaders in understanding and delivering more co-operative leadership behaviour.
3. Develop a co-operative leadership competency that would reside within CGL’s competency model. In the words of one respondent, there is an opportunity here to “better describe in pragmatic terms what the behaviours look like”. This competency would set expectations around performance for leaders in terms of co-operative behaviour.

4. Develop training programs and create opportunities for co-operative experience within the CGL learning approach. It was suggested that this focus could be embedded into current leadership development programs as well as the utilization of external education programs.
5. Provide examples for leaders of what co-operative leadership behaviour looks like in action. Ms. Bardswick, CEO of CGL, is an excellent role model of co-operative leadership behaviour for CGL's leadership population. Demonstrate this behaviour at all leadership levels.
6. Several respondents suggested the provision of a scorecard or other measurement tools to monitor co-operative leadership behaviour at individual and organizational levels.

### **Why Increase Co-operative Leadership Behaviour?**

In total 77.5% of respondents put forth the view that more co-operative leadership behaviour is needed and proceeded to explain their view. Their desire is "a sustainable future" where CGL continues to act with strong ethics. They identified a need to "use all the co-operative advantages to distinguish ourselves from the pack".

#### **Responses on Why CGL Would Increase Co-operative Leadership Behaviour**

- Preparedness for "succession needs for the future due to retirees".
- "Strategic effort to ensure that the culture of co-operation continues to be fostered/encouraged".
- "If leadership doesn't exhibit that behaviour, employees will not". There was feedback that different companies within CGL have different positions of co-operative identity. Participants put forth that we need to be a "co-operative without borders".
- "Competitive edge is tied to this behaviour". Competitive fit will strengthen along with continuous improvement and innovation through co-operative leadership behaviour.
- "In some areas leaders demonstrate high co-operative values, in other areas there is a disconnect".
- "I believe that our more Senior Management Team may be well versed in this area but not so much at the supervisor/manager levels".
- "Leaders have to know they are entrusted with our co-operative identity with their daily actions and words. If they are misaligned, there is a serious problem".

The survey results have provided a framework of examples that describe co-operative leadership behaviour. The responses indicate desire and opportunity for more CLB from leaders and put forth strong reasons for making this change.

## **Analysis**

### ***Summation of Research***

1. Co-operation at a global level is a solution for many problems and CGL actively desires to contribute towards this vision.
2. CGL has co-operative identity as a strategic focus and this strategy is critical to their business and co-operative success. It is noted that this co-operative has accomplished a great deal in terms of achieving co-operative identity and is ready to take a further step on that pathway.
3. Leaders implement strategy and leadership behaviour is a key to successful results. The successful results of strategic implementations increase when leaders are aligned and prepared.
4. Large numbers of CGL's people leaders do not have direct involvement with member owners or governance activities of this co-operative. This limits co-operative knowledge, experience and thus behaviour within a large leadership population.
5. Co-operative identity is defined by the ICA Statement of Co-operative Identity. The statement provides and describes co-operative difference and provides unified direction for the co-operative movement.
6. Leadership competency requirements drive leadership behaviour and leadership behaviour achieves results, when monitored, measured and rewarded.
7. Internal analysis and surveys find the need to embed more co-operative leadership behaviour at CGL. Survey responses of CGL people leaders suggest how to achieve this.

8. Co-operative management training has a positive and direct impact on the level of co-operative leadership behaviour.
9. CGL's co-operative advantage will be strengthened through more internal co-operative behaviour.
10. Global co-operative organizations and leaders provide practical examples and guidance that will assist CGL on their journey
11. Specific tactical examples are needed to illustrate the practical application of co-operative leadership behaviour for CGL people leaders.

These facts indicate that CGL will benefit by explicitly embedding co-operative methodology with a clear practical application of co-operative leadership behaviour into their HR mechanisms for their people leaders.

### Recommendations: Introduce a Co-operative Leadership Competency

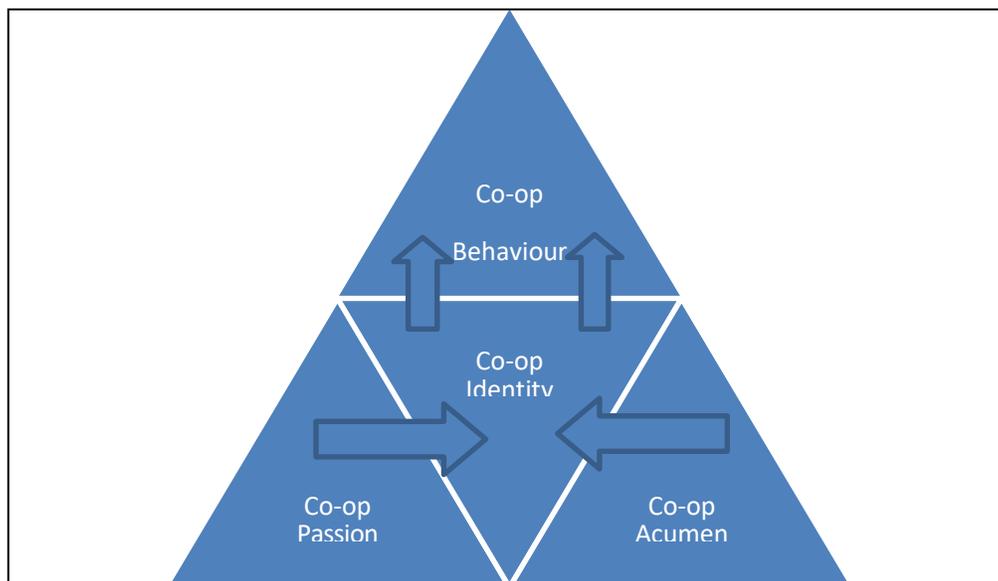
The effectiveness of leaders to deliver on strategy grows when their competencies are developed to provide the foundation for successful strategic achievement. In light of their current strategy and in keeping with their co-operative purpose, CGL's performance will be enhanced by embedding an explicit co-operative leadership competency into its performance management system. This will grow and develop organizational co-operative identity at CGL. The purpose of a co-operative is different from other business models, so it makes sense that there is a different and unique approach in place to direct the performance and behavioural expectation of leaders. It is critical that the new competency be aligned with the Statement of Co-operative Identity.

Below is a draft definition of a co-operative leadership competency that fits within the current framework of the CGL HR model.

Co-operative Leadership Competency: values, knowledge and behaviours that promote and reflect the Statement of Co-operative Identity. This competency is utilized to promote co-operative values based leadership behaviour leading to successful business, social and environmental results.

The model in Figure 10 is put forth as a compilation of the research review of this paper and demonstrates how a co-operative leadership competency would function when embedded at CGL. Comprised of three aspects, values (Coop Passion), knowledge (Coop Acumen) and behaviour (Coop Behaviour) flow through Co-operative Identity to form a Co-operative Leadership Competency that is the engine of co-operative performance. The model supports the development of a formal and explicit stated co-operative leadership competency embedded into CGL's Leadership Competency Model.

**Figure 10: Co-operative Leadership Competency**



**Co-op Passion:** is the alignment of leaders' personal values with co-operative values and principles. This positions leaders to act from passionate commitment while driving accomplishments in economic, social and environmental terms. Values alignment will build leadership courage. As Kathy Bardswick has said, courage comes from a deep belief in one's mission (ICMIF, 2015). Achieving the next level of co-operative performance in terms of social and environmental objectives will require mutual consideration by all stakeholders. Collaboration to meet common needs will be fueled by shared and collective values systems.

Practical Application

- Leaders striving to maintain high levels of consciousness, taking action "to develop and pursue higher purpose within self, teams and business" (Strandberg, 2015b, p. 13). Leaders actively developing self-awareness and higher self-purpose which will enable ethical decision making.
- Reflection on the Statement of Co-operative Identity to contemplate personal values alignment with co-operative principles and values. Regular self-reflection and assessment of personal values and behaviour. This involves reviewing the ICA Statement and asking Tom Webb's question "if we really believe that, what would we do differently?".
- Leaders being courageous about putting their values to work at work, leading to further examples of doing the right thing when faced with challenging decisions.

Co-op passion and values fit is an integral component in recruitment and leadership development. The "active values" competency contained in Ms. Strandberg's (2015b) model has many relevant and valuable applications that CGL could leverage in the promotion of this foundational component of co-operative leadership behaviour. Although Ms. Strandberg has not explicitly used the Statement of Co-operative Identity, her work was modeled in collaboration and in strategic partnership with co-operative organizations.

**Comment:** There were a few remarks in the survey responses and in interviews that acknowledged that the strong co-operative culture at CGL meant leaders behave co-operatively as a direct result of culture without needing to understand co-operativism. Likely this is true at times; however, without intention behind leadership actions there is a loss of purposeful connection with co-operative identity which would limit achievement potential. Another respondent comment was that "it is my personal values which impact my behaviour more than co-operative values", which points both to the importance of understanding personal values and to their role in driving behaviour. With alignment to co-operative values there is a strengthening of potential and deeper awareness of personal values.

**Co-op Acumen:** is the knowledge that leaders require to understand co-operation and interpret the Statement of Co-operative Identity. It is not possible to model co-operative identity without a solid understanding of what co-operative identity is. Co-op acumen can be developed through experiences, education and training. The research of this paper would indicate a review of CGL training programs to enhance co-operative learning in terms of social, economic and environmental factors. CGL has excellent programs in place with opportunity to embed further co-operative and sustainability content.

With the recent change that places sustainability goals within co-operative identity at CGL, it is important to focus on sustainability knowledge. Ms. Strandberg describes this as "the knowledge of how environmental, economic and social sustainability impacts the organization and how the organization impacts sustainability" (Strandberg, 2015b, p. 12). CGL has a wealth of sustainability knowledge produced by their corporate sustainability team and this information is readily available. Promoting wider understanding for leaders and embedding more content into training would enable the development and growth of co-op acumen.

Practical Application:

- Leaders actively learning about co-operatives through various methods and experiences.
- Performance plans would include objectives on learning more about co-operation including sustainability.

- Co-operative identity themed town halls with Senior Leaders talking about co-operative identity and sharing their co-operative based stories.
- Leaders joining co-ops and participating in the governance of those co-operatives. Communicating about those experiences with stakeholders and encouraging others to get co-operatively active.
- Learning more about CGL's member owners, their members and their business. Actively supporting these co-operatives.
- Participation in the Saint Mary's University programs. (There are three programs available to meet different individual needs.)
- Further utilize IMCIF's Advanced Management Course, and the ON Coop Co-operative Management Certificate (CMC).
- Utilizing the Co-operative Index tool to measure co-operative management performance.
- This will not only set expectations for performance but grow co-operative knowledge.
- Finding innovative ways to keep the co-op conversations going and top of mind will encourage development of knowledge for the leader and their staff.

**Co-operative Identity:** sitting in the center of the model is the personal actualization, meaning and development of the co-operative common purpose that occurs through values alignment and deep understanding of co-operation. Once leaders develop their Co-op Passion and Co-op Acumen they will actualize their co-operative connection and leadership behaviour will shift further towards co-operative leadership action. This shift was demonstrated in the research findings of Professor Côté (2014).

**Practical Application:** This reflective internalization is a bit harder to see and therefore hard to describe in pragmatic terms. It is the establishment of co-operative based activism and motivation that occurs through shared values and belief, causing behaviour change. In essence, it is a shift or alignment of personal identity and desire. This could be called co-operative actualization.

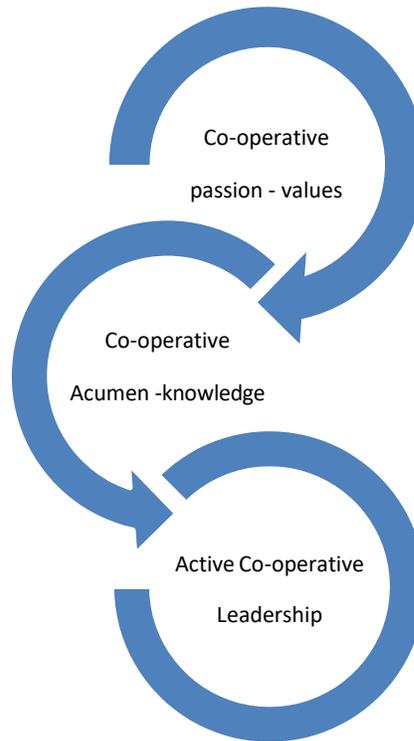
**Co-operative Leadership Behaviour:** is co-operative leadership externalized action taken from a vantage point of co-operative identification. The leader's motivation and foundation of co-operative values and knowledge generates action. The co-operative behaviour comes from alignment of the leader's personal values with the Statement of Co-operative Identity.

**Practical Application:** examples can come in many ways as was shared within the survey of CGL leadership. In particular, the four groupings of behavioural examples listed above and taken from the summarized qualitative survey results demonstrate co-operative leadership behaviour. Below are some examples of this behaviour which are not prioritized nor intended to be an exclusive listing.

- Co-operative Communication - talking about co-operative identity and practising active listening.
- Service to People - which includes modeling a servant style of leadership.
- Co-operative Decision Making – applying co-operative principles and values when making decisions.
- Internal and external collaboration- seeking collective and mutual successful outcomes for all stakeholders through inclusive approaches.
- Co-operative Avocation – actively modelling co-operative behavior (Mondragon, 2012) at work and in the community.
- Co-operative knowledgeable leaders questioning “If we really believe that, what would we do differently?” (Webb, 2015).
- Initiating and promoting innovation and out of the box performance of teams.

Co-operative leadership behaviour flows from values, through learning and into action as illustrated in Figure 11. Individuals move through an internal state of reflection and learning into actively externalized co-operative behaviours. The key for leaders is to move into informed values-based co-operative action within their management roles. It is a skill that evolves from active practice built from a mix of art, science, and courage

**Figure 11: From Co-operative Values to Co-operative Leadership**



Co-operative leadership behaviour is the focus in this paper; however, it follows for all roles and co-operative stakeholders, that aligning values and gaining co-operative knowledge will increase co-operative behaviour and identity. This flow of behaviour change fits with CGL’s Organizational Development approach of Learn Develop Perform.

**Comment:** At times co-operative leadership behaviour can look like leadership behaviour in other business models. However, in these cases it would be the **co-operative intention** or the “why” behind the action that is the co-operative motivation versus market driven thinking. Many aspects of leadership are taught through programs such as the MBA. It is not the intention of this paper to suggest that the elements of those programs are not necessary or valuable for CGL. There is overlap between these bodies of knowledge and both are important to be a successful people leader at CGL.

### **Benefits: An Explicit and Embedded CGL Co-operative Leadership Competency**

There are a number of benefits for CGL in increasing co-operative leadership competency as it directly links to the success of their new strategy and impacts cohesion for all stakeholders. Below is a summary of benefits:

1. Increasing co-operative leadership behaviour links and enhances broad success in that stronger co-operative identity not only fulfills the purpose of co-operation, it enhances the ability to deliver improved client engagement and provides pathways to innovative solutions in terms of effective expense management. Peter Clarke (2014) predicted in the closing comment of his report that “if we do not internally demonstrate our senior level understanding of our identity, our commitment to execute co-operative advantage and engage affinity groups will suffer, and we will not be able to differentiate ourselves from our competitors in the broader marketplace”. By implementing a co-operative leadership-based competency, CGL can mitigate negative market impacts.
2. By increasing co-operative leadership behaviour, the desired “culture of high performance” (CGL, 2015a) is stimulated and encouraged through the intrinsic connection of co-operativism for leaders, staff, advisors, clients and other key stakeholders. Again, the work of Peter Clarke (2014)

- pointed to benefits from “greater leadership embedment” that will drive an improved performance culture as well as develop the “shared understanding of what it means to be a co-operative”.
3. The advantage of being a co-operative is only as strong as the presence of the co-operative difference. By engaging leaders in co-operative behaviours, CGL can increase the co-operative advantage. Professor Daniel Côté (2000) in *Co-operatives and the New Millennium* speaks of how co-operative advantage enhances certain competitive advantages in a highly competitive world.
  4. Protection of future success for CGL will be strengthened, as when co-operatives fail, it is often noted that the leaders had moved away from co-operative identity. This is the case in the recent situation of the Co-operative Bank in the UK. In essence, strong co-operative behaviour by leaders promotes future co-operative success and builds leadership bench strength in terms of succession planning for future co-operative and business performance.
  5. Leaders with strong co-operative identity will be aware of and respond to social conditions generating business solutions and community connection. They will be constantly developing teams in the delivery of the co-operative purpose and demonstrating the right thing to do in variable situations. For CGL this translates to improved focus on unmet business, social and environmental needs. Social and environmental concerns both impact CGL’s business outcomes as well as sustaining the planet for future generations. Leaders that are informed and active in co-operative behaviour will be positioned to strongly deliver products and services that address economic, social and environmental needs.
  6. Achieving higher levels of co-operative identity and connection with the larger co-operative movement will be driven by co-operatively focused leaders. There will be successful business outcomes of growth and long-term profitability due to higher levels of client engagement. There is a proven co-operative advantage that comes with the achievement of walking the talk of co-operative identity.
  7. By further exemplifying co-operation in their products, services and behaviours, CGL connects to their clients through human values and demonstrates the global mandates of the ICA Blueprint for a Co-operative Decade (ICA, 2013).
  8. Clients and other stakeholders will connect to the strong human and financial values of co-operation, such as the financial spread of surplus to communities and people. This difference demonstrates the purpose of co-operation and creates competitive advantage that grows exponentially with the achievement of co-operative identity. Unified purpose of co-operation connects to stakeholders intrinsically and makes business sense while bringing co-operative values and principles to life.

### Recommendation Summary

Research and benefits analysis support a recommendation that CGL proceed to embed an explicit co-operative leadership competency into their HR management programs. Leaders are strategically critical to the delivery of the co-operative identity strategy and mission. This approach will build clarity of performance expectations around co-operative identity. The provision of supportive recruiting, on-boarding, learning, training and development aspects will increase co-operative identity, more quickly enhancing the delivery of the 2015-2018 strategic plans and objectives. In order for this to be successful, measurements are needed and the CoopIndex should be fully explored as it has the ability to provide both leader and organizational level feedback. These recommendations would benefit from being grouped into a Co-operative Leadership Development Program to ensure effective development and delivery of this new approach. These recommendations develop “shared and unified understanding” (Clarke, 2014) of what co-operative identity is and provide “mechanisms for measuring progress towards embedment” (Clarke, 2014). CGL’s people leaders will be positioned to increase their co-operative performance and CGL’s Co-operative Identity will strengthen.

#### *CGL Update on Current Competency Review*

In a recent interview with Shelly Lang (August 17, 2015), Organizational Development Manager, who has been actively working on the competency review, Ms. Lang shared that “The Co-operators is in the final stages of

reviewing a model which proposes to emphasize a distinct competency at both the Leader and Individual Contributor levels, focused on co-operative behaviours. The model also provides for a balanced approach to incorporating co-operative behaviours under all the other competencies, at all levels in the organization. The intention is that it is a clear and integrated approach to demonstrating co-operative values and principles". This is good news and "it will be ideal if we can demystify what being a leader in a co-operative means and support each other in living our values".

### Conclusion

This paper has examined Co-operative Leadership Behaviour at CGL as well as the value of increasing co-operative leadership competency. A model, tools and recommendations have been presented to enable growth of this critical leadership component. It is time for increased co-operative leadership behaviour at CGL. This will

**S** (social) **E** (economic) **E** (environmental) strategic achievements unfold.

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