

## Co-op Performance Indicators – Project Update

Nov 2016

This is a time of activity and Daphne and I wanted to let you know we have not been dormant over the summer or early fall.

Through the support of CEARC (the Centre for Excellence in Accounting and Reporting of Co-operatives) and a MITACS grant we have been able to move the project forward. We worked with the Data Analytics department at Saint Mary's University to develop a web-based beta version of a collection and database tool for social, environmental and coop performance indicators. This a great step forward as through the MITACS grant we were able to employ data analytics Masters students to design and code the online tool. The skills to accomplish this are far beyond anything Daphne and I have, so our partnership with the department was priceless. We are in the final throws of tweaking the beta version before we put it through testing.

While the tool was being built, Daphne and I have been conducting interviews with a wide range of co-operatives – big, small, all industries and types, and across the Nation. Through these interviews we have been able to uncover co-operators' feelings and ideas around a system of data collection, analysis and reporting for expanded performance of co-operatives, as well as to solicit interest and participation in the upcoming workshop and pilot project (more about this in a moment). We have heard a diversity of voices regarding expanded performance measurement, which has helped us to understand, tweak, shift, and change the project accordingly. Interviewees have been curious, questioning, and full of good ideas. Many thanks to those who have shared their time and insights and to those who helped us to secure interviews.

We are also pleased to say that we submitted an application to the SSHRC Connection grant funding package. We have proposed outreach activities that include pre-workshop, workshop and post-workshop activities that are planned to begin in January 2017 and continue throughout the year. The outreach activities pivot around the pilot project, which will begin in May 2017. Here are the broad strokes for the proposed outreach activities as designed for the SSHRC proposal.

Months 1-3: Pre-workshop activities: Co-operatives have already been contacted and will be confirmed as participants by the end of January. Given the interest in this topic within the co-operative sector, it is not anticipated it will be difficult to fully secure 15 participants for the pilot project. Students will be hired. A webinar explaining the pilot project and expanded co-operative performance measurement will be developed using the foundational research findings. This will be aired and posted on the CEARC website. A package of documents will be prepared including key literature, pilot explanation, workshop purpose and agenda. All logistics for the workshop such as travel, accommodations, venue, hospitality, translation and recording functions will be organized.

Month 4: The workshop: The event workshop is planned for May 11, 2017 at Saint Mary's University. The participants will come together for a day to share, discuss and plan. Following the workshop they will participate in the 2nd International Symposium on Accounting and Reporting: Co-operative Socio-economic Transformation, which is directly related to the pilot project purpose and objectives.

Months 5-12: Post-workshop activities: After the workshop, there will be extensive follow up with the participants as they move into the pilot project, as well the pilot project team will move into the full implementation of the knowledge mobilization plan. Throughout these months the pilot project will be managed through ongoing connection with participants, provision of updates, troubleshooting and direct support to participants, and updating the beta version of the tool. During this time, the knowledge mobilization plan will be fully implemented including content for websites, newsletters and social media, as well as conference presentations at CASC 2017 and Stirling 2017. A journal article will be written for submission to a relevant journal and presentations will be developed for conferences and congresses. When the year is out, participants of the pilot project will have impact assessments completed at which point a conference call will be conducted to discuss the process and findings.

Needless to say we are excited about the next steps in the project, especially the testing of the tool, the workshop and the pilot. We will continue to disseminate findings from the project and hope you will help us do so as well. If you have any ideas, suggestions or connections we should make, please do not hesitate to contact us.

Fiona Duguid and Daphne Rixon