

# Cooperative Education Inventory Study

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February 2014

Prepared for The Cooperative Foundation

## Table of Contents

I. Introduction .....	5
II. Literature: Assessing the need for cooperative education .....	6
III. Overview of Co-op Education Organizational Settings .....	8
IV. Methodology .....	10
V. Results.....	12
VI. Discussion of the Results .....	19
VII. Conclusion.....	24
1. Limitations.....	25
2. Future research .....	26
Appendices.....	30
Appendix A: Survey Instrument .....	31
Appendix B: Directory of Co-op Educators.....	32
Appendix C: Results of Survey Research .....	39
1. Questions overview .....	39
2. Cross Tabulations .....	50
Appendix D: Annotated Bibliography of Cooperative Educational Literature Cited in the Study .....	55
Appendix E: Responses to Questions 19 & 20 .....	69
Appendix F: Interview Results.....	85

# Executive Summary

## Cooperative Inventory Study

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The Cooperative Foundation contracted the Cooperative Inventory Study to determine what their strategic priorities should be in support of cooperative education. The study was formulated around four research questions:

- How do we assess that the materials are being produced by the best available source?
- How do we assure that the materials are available for use beyond the local or regional organization?

How do we assure that there is not unnecessary duplication of effort? The study was developed with a multimethod research utilizing a survey, interviews with 13 cooperative educators to drill more deeply into themes that surfaced in the survey research and content analysis of published resources and web based digital resources. The survey polled 368 cooperative educators and had 102 responses.

The study found that the US Department of Agriculture's cooperative publications are commonly used even though many of their publications were originally intended for a rural and agricultural audience. The Northcountry Cooperative Foundation Toolbox materials were also used widely. The Co-opoly game developed by the Toolbox for Education and Social Action is also used frequently by those who responded to the survey. The report includes an annotated bibliography which has a full listing of recommended resources.

The key findings regarding assessing the abilities of organizations to develop materials is that new education materials should be developed by people with firsthand experience in cooperatives and who are experienced educators knowledgeable of participatory and popular education pedagogy. There is also a need to convene educators to share their materials and to provide peer to peer assessment.. This will enhance the quality and accessibility of materials beyond the local or regional organization, and also reduce the risk of duplication in the development of materials. There is also a need for more accessible materials on legal incorporation state by state and cooperative finance. New interactive resources that are web based such as games are needed.



# Cooperative Education Inventory Study

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## I. Introduction

There has been a tremendous growth in interest in the development of cooperative forms of business in recent years, particularly since the 2007 recession and the jobless recovery that followed. Grassroots groups are attracted to the cooperative form of business since it fits well with their goals for creating locally owned and controlled businesses. They are also an important vehicle for strengthening civil society (Putnam, 1993, p. 139). Putnam found in a study of democracy in Italy that civil society was strongest in northern Italy where he also found a stronger presence of cooperatives. Stadelmann-Stefan and Freitag further developed this point in their research (Stadelmann-Stefan & Freitag, 2011) by flipping the question to consider how voluntary participation in democratic associations results in greater civic engagement. They found that participation in democracy can increase volunteerism. This is a critical element for successful cooperative organizations and an important goal of community development.

While there are many sources of information about co-ops, there has not been a systematic inventory of the educational resources or educators who provide education and training about cooperatives. Groups that are new to the cooperative form of business often propose to develop their own materials for community education and training unless they are able to locate suitable existing materials. Sometimes groups are challenged by the lack of materials that are culturally appropriate. In other cases, they find it difficult to obtain reliable information about whether a cooperative would be a good fit with their needs or about the legal incorporation of cooperatives in their state. The affordability of resources can also be a factor.

Consequently, The Cooperative Foundation saw a need to systematically assess the field of cooperative education and training. Without an existing inventory, it has been difficult for funders to gauge where there are gaps and how best to support educational and training initiatives. This research has been developed to guide The Cooperative Foundation in its role as a funder of groups developing new cooperative education materials. The questions addressed by this study are:

- How do we assess that the materials are being produced by the best available source?
- How do we assure that the materials are available for use beyond the local or regional organization?

How do we assure that there is not unnecessary duplication of effort? This study has surveyed cooperative educators nationally about the types of educational activities they conduct and the educational materials used in their educational programming. Follow up interviews were conducted to explore the issues more deeply with 13 co-op educators. The Cooperative Foundation will use these findings to guide their future funding priorities in the development of high quality educational materials and to better meet the needs of cooperative educators and the general public.

The researchers developed a list of co-op educators and a survey instrument with the help of an advisory board comprised of: Sarah Pike, from the Association of Cooperative Educators; Taliesin Nyala from the Toolbox for Education and Social Action (TESA); Melissa Hoover from the US Federation of Worker Cooperatives; and Leslie Mead, president of The Cooperative Foundation along with the foundation's board members, Anne Reynolds (University of Wisconsin); Rosemary Mahoney (consultant) and Margaret Bau (USDA). The survey was then administered electronically to 368 people identified by the advisory board and research staff, those who accessed it through the foundation website, and individuals known to be engaged in co-op education. At the completion of the data collection, there were 102 responses to the survey. The sample is comprised of educators in a variety of organizational settings including local regional and national organizations. All co-op sectors were contacted to participate in the study. Cooperative groups as well as community based organizations interested in promoting cooperatives were approached to participate in the study.

## **II. Literature: Assessing the need for cooperative education**

What is the state of the field of cooperative education? In order to answer this question, we begin with a review of the literature about education about the cooperative form of business. Also considered here are the organizational settings where co-op education occurs.

The largest source of cooperative educational resources can be found on the US Department of Agriculture's Rural Development website. The site includes materials for co-op developers, boards and members of existing co-ops as well as materials targeted to youth. The site also includes videos, podcasts, and PowerPoint presentations.

Educational materials can also be found on the websites of national, sectoral and state level trade associations and individual co-ops. There is not a lack of materials. An annotated bibliography for web based and published materials referenced in this paper can be found at the end of this report. What appears to be at issue is how to find materials to fit the needs of individual groups – particularly those who are not already connected to the co-op community in the USA.

Co-op education is delivered in a variety of formats including workshops, certificate trainings, college courses, and webinars. Many successful co-op initiatives such as the Antigonish Movement and Mondragon were started using study clubs or circles (Mathews, 1999, pp. 162-

163; 194). The Federation of Southern Cooperatives also employed this methodology, according to Gordon Nembhard (Collective Courage, 2014, p. 138); in this approach to cooperative education, a group would meet weekly with an elected leader from the group. The groups would then receive materials to guide their study of the local problems. People interested in starting new co-ops are often self-directed, self-taught groups gleaning information from a variety of sources.

Whitman cites a general classification system developed by Foley for analyzing co-op education. The relevant four educational forms for this proposed research are: formal, non-formal, informal and incidental. Formal education consists of courses geared to specific educational outcomes such as degrees and certificates. Non-formal education includes trainings and courses for the purpose of upgrading skills. Informal education entails purposeful reflection while incidental education is casual or unintended learning through experience (Whitman, 2012, p. 247).

At an informal level, there are many widely available sources that can be accessed from the Internet about the cooperative form of business. There is general information about cooperatives on many corporate websites such as those of the National Cooperative Business Association, NCB, and most cooperatives. This information is often of use for the general public i.e., those with a casual interest and for whom a fairly superficial introduction to cooperatives is sufficient.

Based on the types of queries that cooperative educators encounter, there is a need for information that can assist beyond the introductory level of information. This has been handled through formal and non-formal forms of education. In each cooperative sector there are educational resources that have been developed at the level of their trade association to serve their member co-ops. A study mapping cooperative studies in higher education has already outlined where curriculum is being taught. Still needed is an effort to document what the course content, syllabi and materials used in college courses are (Clamp, 2013). This means that the type of educational form is wide ranging and includes groups that deliver non-formal and formal educational programs for academic credit.

The gaps that were identified in a survey conducted as part of the mapping study cited the greatest areas of need for more educational resources should focus on human resources in cooperatives, cooperative finance, and co-op law (Clamp, 2013). Some sectors have well developed resources while others are likely to have more limited resources available to a general audience. This suggests that there is a need for greater investment in resources for training materials to serve a variety of cooperatives across sectors but which are more advanced than introductory level materials.

The credit union sector is illustrative of factors to consider in this study. The credit union sector has an extensive and well developed set of educational resources. Information is available from government sources at the level of the National Credit Union Administration (NCUA) about the federal chartering process and the steps entailed to create a new credit union. State credit union

leagues provide member education materials for their member credit unions. CUNA (Credit Union National Association) provides education and training for staff and boards of credit unions. Additional information is also available from the National Federation of Community Development Credit Unions specifically for credit unions with a community development designation from NCUA. Often community groups who are considering starting a new credit union are able to secure very good educational resources and even technical assistance from these organizations and other local credit unions (Huppi & Feder, 1990)). However, there is usually a cost to acquire the materials; so while the materials exist, access comes at a price.

The food cooperative sector has seen recent gains in the area of development resources with the Food Cooperative Initiative (FCI) (Hibbert, Piacentini, & Al Dajani, 2003)). FCI has a resource rich website that provides print, podcast, and film resources for groups considering whether to start a new food cooperative that are free and available on the web. Additional resources can be found on the website of CDS Consulting, and the websites of many individual food co-ops. Typically, groups organizing a new food co-op reach a point where they look for more detailed information such as templates of business and marketing plans from co-ops that have already developed them.

### **III. Overview of Co-op Education Organizational Settings**

In the United States, co-op educators may be found in a variety of organizational settings ranging from government to national trade associations to regional co-op development centers and local nongovernmental organizations. Those in government are employed by the US Department of Agriculture in Rural Development (USDA). At one time, the USDA had co-op development specialists in each of the fifty states. Now, the only remaining co-op specialists in the USDA are based in Washington DC. They are responsible for maintaining and updating the digital co-operative resources on the USDA's website.

State councils are trade associations of cooperatives. The National Council of Farmers' Cooperatives lists 24 state councils (<http://www.ncfc.org/member-directory/state-councils>). Most operate within one state, but some are regional. Most state councils provide legislative advocacy and co-op education for their members, staff and boards of directors. Often they also provide programming to introduce youth to cooperatives and to build future leadership for their co-op members. Given their focus on education for their members' co-ops, they need to provide not only introductory information for new staff, but also more advanced content for boards and recurrent training of staff.

Some staff members of cooperative foundations also engage in co-op education. The largest is CHS Foundation which is the corporate foundation of the largest agricultural cooperative, CHS Inc. It has been a strong supporter of co-op education and has provided support to co-op education with a particular emphasis on program support for co-op education in agricultural economics and to youth co-op leadership development. The Food Co-op Initiative provides seed



capital and educational resources for groups interested in starting new food co-ops in the US. The Co-operative Development Foundation is a foundation affiliated with the National Cooperative Business Association and has provided support generally to expanding and strengthening the presence of co-ops in the United States. It defines its educational role as “educational programming that both enables networking among co-op development practitioners and raises awareness about cooperatives in the public policy arena” (<http://www.cdf.coop/mission/>). The Cooperative Foundation, the sponsor of this research, seeks “to expand and enhance cooperatives through research, teaching, extension, innovation and development” (<http://www.thecooperativefoundation.org/>). While their primary purpose is grant making some of their staff also engages in co-op education at times.

University professors with ties to cooperatives also teach about co-ops. The majority are primarily in agricultural economics, and the social sciences offering classes for both graduate and undergraduate students (Clamp, 2013).

Cooperative Development Centers are another organizational setting that plays a major role in co-op education. There are 41 cooperative development centers which currently have funding from USDA.

The other organizational type that is engaged in co-op education is local community based nonprofits. These organizations have program staff, such as community organizers, who see a fit between local need and the cooperative business model. They raise grant funds to support this work and may recruit support from co-op development centers or consultants to implement their projects. The discussion of the research findings will allow us to determine how these types of organizations deliver their educational programming. It will also allow us to provide a directory of who is providing the training in these various organizational settings.

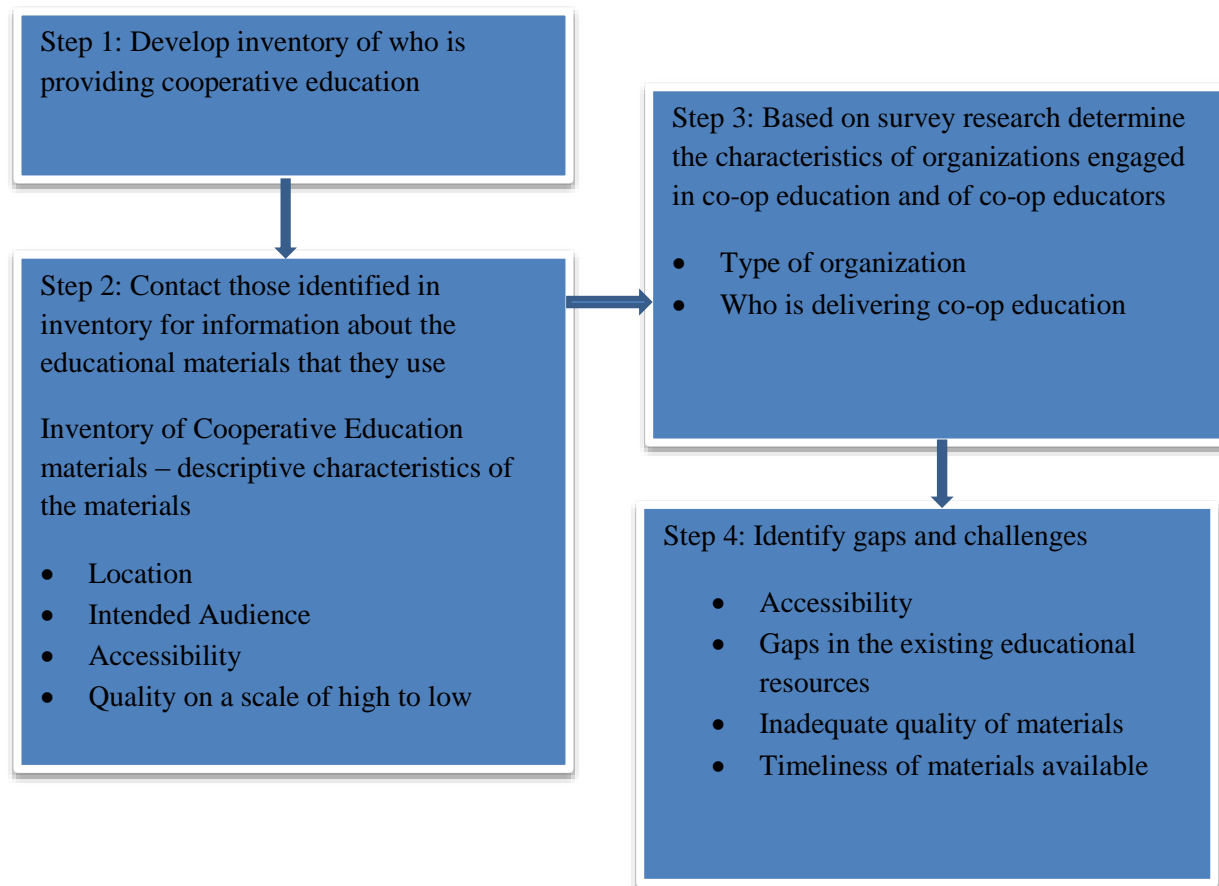


Table 1: Conceptual Framework Diagram

## IV. Methodology

The study set out to document where materials already exist and the quality of those materials based on objective criteria developed in consultation with the advisory board of The Cooperative Foundation. Table 1 summarizes the conceptual framework for the study. Table 2 outlines the research design, the sources of information to be collected, and the relevant variables and information to be collected.

In step 1, we met with an advisory group to develop a list of potential co-op educators. We were able to assemble a list of 368 contacts of people involved in co-op education and training in the USA. Assistance with the creation of the list was provided by members of an advisory group comprised of: Sarah Pike, from the Association of Cooperative Educators; Taliesin Nyala from the Toolbox for Education and Social Action; Melissa Hoover from the US Federation of Worker Cooperatives; and Leslie Mead, president of The Cooperative Foundation along with the foundation trustee's, Anne Reynolds (University of Wisconsin); Rosemary Mahoney (consultant) and Margaret Bau (USDA). In step 2, we developed a survey instrument in Qualtrics and then administered it by email to everyone on the list between October 2013 and February 2014. If

people did not respond to our email, we sent them reminders and offered to conduct the survey over the phone. In this way, we were able to obtain 102 completed surveys by February 2014.

Steps 3 and 4 are at the data analysis stage. Step 3 entailed the analysis of participant responses to questions about themselves and their years of experience in the field, and about the types of materials they use. Step 4 entailed an analysis of 3 open ended questions to assess what gaps exist in the literature and what types of materials or educational media would be appropriate to fill the gaps. At this stage, interviews were conducted with a group of 13 cooperative educators to follow up on themes and issues that surfaced in the survey research findings.

Table 2: Research Design

Question	Sources of information	Variables/type of information to be collected
<b>Who is providing cooperative education?</b>	Internet; existing directories from trade associations; key informants; and phone follow up interviews where necessary	<ul style="list-style-type: none"> <li>• Name</li> <li>• Contact information</li> <li>• Type of organization</li> <li>• Services provided</li> <li>• Geographic area served</li> <li>• Organizational structure</li> </ul>
<b>How do we assess the abilities of these organizations to produce the materials?</b>	Survey instrument developed in Qualtrics on SNHU system. Survey tool to be developed with The Cooperative Foundation board. It should include questions to determine how materials were developed and by whom based on what skill set.	<ul style="list-style-type: none"> <li>• Type of organization</li> <li>• Qualifications of the developers of the materials</li> <li>• Effectiveness of the materials for serving the intended audience</li> <li>• Appropriateness of the materials for the intended audience</li> <li>• Efficiency of the materials for transmitting the information</li> </ul>
<b>How do we assess that the materials are being produced by the best available source?</b>	<p>Review the materials based on the criteria established for answering question 2 and develop a set of standardized evaluation criteria.</p> <p>Where there is duplication of effort, compare the findings.</p> <p>Secondary data sources that can be accessed about the impact of these materials where available from the organizations that have developed the materials.</p>	<ul style="list-style-type: none"> <li>• Characteristics of organizations</li> <li>• Qualifications of the developers of the materials</li> <li>• Effectiveness of the materials for serving the intended audience</li> <li>• Appropriateness of the materials for the intended audience</li> <li>• Efficiency of the materials for transmitting the information</li> <li>• Organizational history</li> </ul>
<b>How do we assure that the materials are available for use beyond the local or regional organization?</b>	<p>From an electronic survey and phone interviews where surveys are not returned</p> <p>Where available request tracking information on web-based access of materials</p>	<ul style="list-style-type: none"> <li>• Type of access</li> <li>• Location of access</li> <li>• Cross sectoral applicability</li> </ul>

## V. Results

The research entailed multiple methods in developing a response to these questions. In the first phase of the research, survey research identified themes and issues for further inquiry. These issues and themes were then the framework for interviews with key informants. Content analysis of the literature resulted in an annotated bibliography (see Appendix D) and enabled us to connect the data to the existing literature. Literature identified by respondents in the survey research were reviewed and annotated. Additional sources identified by the researchers were also included. The tables summarizing the results of the survey can be found in Appendix C. This section begins by addressing directly the questions that framed the research. Additional discussion of results reflects themes that emerged in the study.

The research drew on widely used evaluation criteria in answering the research questions. The criteria included assessing the years of experience of educators; the fit or “appropriateness” of materials i.e., complexity of the writing; suitability for the educational level of the target audience; accessibility of the resource (still in print; cost, etc.) and whether the information is in the best delivery format. The first is the criterion of authority. This criterion assesses the qualifications and experience of the educator. Years of experience in cooperative education was used as a measure of educators’ subject matter expertise in the field

The appropriateness criterion does not assess the quality of a resource but rather is focused on its usefulness for a specific audience. For example, a text that is written in sophisticated and scholarly language will not be appropriate for a group of individuals with significant interruptions in their education but is precisely what you would want with a graduate course on cooperatives. People without a habit of reading, will be challenged if handed a 100 page manual to read before a co-op education seminar. This criterion is essentially asking who this material has been written for.

Effective materials should be able to serve a potential group of cooperators as a roadmap or guide to the development process. The materials need to give people enough information to take meaningful steps and to alert them to issues that will require decision making on their part.

The efficiency criterion considers whether the materials are well suited based on issues of accessibility. i.e. cost, availability, and delivery format. We might develop the most wonderful digital materials and create an app for them, but if the target audience does not have access to the technology, it will be for naught. Materials that have a high per unit cost will similarly be inaccessible for most potential cooperators

### **Assessing Whether Materials Are Produced by the Best Available Source and are Widely Available**

The survey and follow up interviews found a very limited number of organizations create their own materials (For instance, Kansas State University, University of Wisconsin and Iowa State University). For other academic sites, materials are compiled from available open source materials. This raises an important question: Is the source material accurate and up- to- date. Are academic materials being revised to make them more accessible to a general audience? One interviewee specifically indicated that the information must be revised so that “‘everyman’ or the common man can understand it.” Another indicated that “new materials take a time consuming search process, someone should be tasked with keeping resources up- to- date.”

Even though the materials are not created from scratch, training organizations appear to have a grasp of the scope and availability of cooperative materials that satisfy a breadth of training needs. Particularly useful materials cited by this group include: The toolbox kits produced by Northcountry Cooperative Foundation, USDA publications, University of Wisconsin’s Center for Cooperatives’ materials, state councils materials, David Cobia’s book (Cobia, 1989), CooperationWorks! training materials, Canadian’ training resources or Mondragon resources

Many survey respondents indicated that they are identifying useful materials from other English speaking countries. All materials available in English are not equally helpful for potential American cooperators. The Canadian cooperative movement has developed a great deal of resources about cooperatives. These resources include a full range of information from comic books to scholarly detailed discussions of governance and finance. While some resources are

applicable across borders, there are aspects that are country or even state specific. Laws of incorporation vary in the United States from state to state. Discussions of co-op finance while more standardized are subject to federal and state tax laws that are not the same as in other English speaking countries.

The survey found that the majority of people who took part in this study have familiarity with the cooperative material evaluated in the study: 34% of our participants have between 6 and 15 years of experience with cooperative education materials, 23% have more than 20 years experiences with these materials, and 27% of them have between 2 and 5 years of experiences with the same materials (table 4). The greater challenge may be to identify people who have experience with participatory and popular education

### **Key Organizations in Co-op Materials Development**

The opinion of cooperative experts, community organizers and government officials is important to assess the accuracy of cooperative education materials addressed in this study. Question 2 in the survey sheds light on the respondents' involvement in cooperatives and cooperative related organizations (see Appendix C, Table 3). It helps determine the nature of the organizations they work in. The majority of our participants (21%) are actively involved in cooperative education, 16% of them work in community based development organizations, and 12% work in cooperative development centers. The groups that are least represented in the study are the government (3%), international co-op association (2%), and co-op organizations anchored in universities' business schools (2%).<sup>1</sup>

Participants in the survey either strongly agreed or agreed that the co-op materials that they were asked to evaluate were "accurate". There were a number of resources that were cited by respondents but which are dated. Sources that are dated were included in the annotated

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<sup>1</sup> No surveys were completed by people in university departments of consumer science, public administration/planning; nor a rural extension department (Table 3). Further clarifications regarding this question are provided in the discussion of the research section.

bibliography with a recommendation that they be updated if possible. Some respondents observed that not all the USDA materials are current.

John Wells and Jim Wadsworth of the USDA Rural Development were interviewed about the status of USDA cooperative education materials. The USDA materials are widely used both in nonformal and formal educational settings as are the toolbox publications from the Northcountry Cooperative Foundation. These were repeatedly cited both in the interviews and in the survey. The most frequently requested USDA materials are periodically updated. The introductory materials are available digitally and in print form. More advanced materials are only available digitally. The USDA Cooperative Service Publications include five introductory materials with Spanish versions. USDA lacks the resources to produce graphically rich materials that would serve audiences with low English literacy or more Spanish language publications. .

USDA is committed to making the cooperative publications more generic so that they will have more value for non-agricultural audiences. It may be possible to include references to non-USDA materials on their website to make them available to a wider audience. They also would welcome hearing from cooperative practitioners about materials that are missing from their publications list. The full list of USDA Cooperative Publications is included in appendix E of this report. Clearly this is an important resource that can facilitate access to resources beyond the local or regional level.

Organizations engaged in cooperative education and training typically develop their own curriculum according to all the people contacted in the individual interviews. It is important to tailor curriculum to the target audience. One CooperationWorks! member recommends to people and organizations to have their materials reviewed by Toolbox for Education and Social Change (TESA) as they have seen a “huge improvement in those resources pre and post review.”

The majority of our participants indicated that, trainers must have the following specific qualifications/skills: (1) general training skills and (2) specific co-op expertise skills. Indeed participants indicated that trainers must be creative, innovative and able to run democratic meetings (first category). They also stated that trainers must have experience in the co-op area

they are training in. The following experiences are repeatedly mentioned: Experience in formal and informal settings, experience in democratic and popular education, curriculum development ability, and experience in organizing and working within a cooperative (second category).

One interviewee noted that not all co-op education organizations will freely share materials with others in the field. Consultants who have developed their own curriculum are less likely to share what they have developed, particularly when it may erode their pipeline of consulting work. One very valuable resource is the listserv managed by CooperationWorks! for their members. There are a lot of resources available on the web. These sites are included in the annotated bibliography (see appendix D). For people new to the field, the task of finding the best resources can be challenging. Cultivate.coop was cited as a useful resource by three of the interviewees as well as American Worker.Coop. However those working with Latino groups indicated that their resources are limited and inadequate for Spanish language resources. They would like to see more materials on popular education and cooperatives.

They have found that working with Latinos, materials need to be culturally competent and written in Spanish. It is also important to have the trainings delivered by Latinos in order “to build trust and a sense of empowerment”. They make use of materials from CooperationWorks! trainings, the Mondragon cooperatives, and La Montañita. These materials provided the foundation for one group’s curriculum. They have revised their materials based on their experience in the delivery of the trainings. The fact that many respondents are creating their own materials is a positive indication that educators are providing a scaffold to link their audience to the materials. Yet this is likely to result in duplication of effort among these organizations.

As with any published materials, the assessment of the capacity of organizations and cooperative educators to develop materials depends on their knowledge of the subject and the target audience. Another cooperative development center has worked with Native Americans on co-op development. They have found that as ownership has shifted to a more individualistic ownership form, this has created a cultural shift and barrier to shared ownership. The second barrier is the



association of democratic control with the US government. The Native experience with the US government has been extremely negative.

A good case example is a recurrent theme both in the open ended responses to the survey and in the interviews. This is driven by the fact that people want to know about new and emerging efforts that can inspire and serve as a catalyst for others. The Evergreen co-ops in Cleveland are one such example. The Jackson Rising conference surfaced this as a need according to one interviewee. Another interviewee says good educational materials should illustrate actual experience. This is an important qualification to look for in the people who develop curriculum. Finally, in seeking out information, all the interviewees rely on their networks of organizations and knowledgeable people in the field.

### **But Will They Read It?**

Different audiences need quite different materials. What is appropriate for training educated professionals is far different than what can be used with people who are reluctant readers or who are not proficient in English. Based on the results of the survey, the co-op education training materials most widely used are the USDA co-op educational materials. They are used respectively by the following co-op sectors: agriculture, general cooperatives, consumer/food, worker and housing co-ops. The worker co-op toolbox and Co-opoly were second and are used equally. The worker co-op toolbox is used respectively by worker co-op, general cooperatives, agriculture, and food co-ops; it is not used by housing co-ops. Co-opoly is primarily used by general cooperatives, followed by workers, food, agriculture, and housing co-ops. The materials less used are by co-op educators are the scholarly materials since they can be only used effectively with a well-educated audience (Appendix C, Table 8). No issues were raised about the accuracy of co-op education materials discussed as part of this study. There are issues with how current some materials are. Some information such as legal incorporation and financial policies can change over time.

Participants generally agreed that the cooperative education materials presented in this study were appropriate for intended use. Some materials are found to be more appropriate than others for a broader range of audiences. The most “appropriate” materials include: worker co-op toolbox, USDA co-op educational materials, Food Co-op Initiative on-line resources and Co-

opoly. Where participants have found materials to not be suitable for their target population, the issues raised are the age of the audience, the racial and/or cultural context, the complex language and/or technically advanced discussion of issues (Appendix C, Table 9). It is difficult to inspire and motivate a person to become involved with a co-op if the only testimonies and examples in the literature reflect people from the majority white society.

Interactive games and online apps are an area that was cited by a number of respondents both in the interviews and in the surveys. Respondents did not have precise recommendations in this area but they recognize that in order to reach a broader audience, resources that would incorporate the principles and values of cooperatives in a simulated setting would add a valuable resource and potentially reach new audiences.

According to several respondents in the survey as well as the interviews, The Cooperative Foundation should support new resource material development by developers with demonstrated skills in curriculum development, particularly in participatory and interactive methods and with the requisite subject matter expertise. Priority should be given to materials that are simple and interactive for underserved groups such as immigrants.

The greatest challenge for people is often one of knowing where to look for resources. The second greatest challenge for educators is how to distill it down to the essential elements without overwhelming people. Films and presentations that rely heavily on images can provide a more engaging and accessible introduction to the world of co-ops. Simple case scenarios can provide an interactive platform for providing people with an orientation to what cooperatives are. Co-opoly is a successful example for a face to face training. Yet the cost of the board game may be out of the reach of some groups.

### **Identifying the Gaps**

A fifth category emerged from the interview. In this category participants explained at great length the nature of the resources needed to deliver quality co-op trainings. The respondents explained what is missing to deliver effective and efficient co-op education. They not only stressed the nature of the information missing but also clarified how assistance should be

provided so that educators can create and implement successful education programs. They face three types of issues including (1) curriculum development, (2) time management and (3) availability of funding.

*(1) Curriculum development:*

Co-op curricula are not available, accessible and easy to locate. Curricula that are available are not in the appropriate format for trainers to use. In addition these curricula don't fit the training programs. One participant indicated that "materials couldn't be theological or esoteric – they need to be practical." They also need curriculum with cultural competency. Finally they want the training materials to be centralized to facilitate easy access.

Some participants expressed the need for training. Educators must be trained. "The Cooperative Foundation should convene some kind of national group that could bring the major players together to have a dialogue about co-op education and what should be done to improve what's out there and access to it."

*(2) Time:*

They also realize that curriculum development is a long and tedious endeavor. They don't have the manpower or the time to develop curriculums. The majority of educators don't have "the time to look for or to create the curriculum." They expect to have funding to hire someone to develop curriculums that fit their training programs.

*(3) Funding:*

Many participants expressed the lack of funding as hindering curriculum development. Many co-ops don't have the funds to get these materials. Funding is needed to hire the right people, train them and locate the appropriate materials.

## **VI. Discussion of the Results**

In this section, we examine both the quantitative results and incorporate findings from the open ended questions at the end of the survey for the purpose of outlining strategic priorities for The Cooperative Foundation. There were three open ended questions in the survey. The first question was to identify outstanding materials that the respondents used in their own trainings. This was very useful as it brought to our attention many good resources that were new to us. The last two questions asked people to identify gaps in the literature and what new materials need to

be developed and why? An annotated bibliography (see Appendix D) incorporates information on the materials identified in the question regarding outstanding materials. A table with the responses to the latter two questions is included as Appendix E.

The major groups that participated in the survey and deliver a significant portion of cooperative education trainings were (1) community based development organizations, (2) cooperative development centers, and (3) cooperatives. In our study their target audiences are described as people interested in starting co-ops and people seeking knowledge about cooperatives. A key question is why there are not more educational organizations meeting the needs of people seeking cooperative education. The availability of training resources, ability to create awareness in the community about cooperatives and the ability to identify people with strong interests in cooperatives could explain the success of 1) community based development organizations, (2) cooperative development centers, and (3) cooperatives in educating people. Also, the implicit mission of these organizations is to conduct activities in the community. Therefore, having in place a business model designed to serve the community is contributing to their success.

The results of our study indicate that (1) university: rural extension department, (2) university: public administration/planning department, and (3) business schools are organizations that are least involved in cooperative education. These findings are consistent with findings from the earlier work conducted by Clamp (Mapping Co-operative Education & Training in the USA & Canada, 2013). Rural extension and business schools play a stronger role in the delivery of co-op education in Canada. In the mapping study of co-op education in the USA and Canada, 26% of the Canadian higher education sites are in schools of business and 13% in development/planning/extension offices. There is no business school in the US currently engaged in co-op education (Clamp, 2013). The foundation should support efforts to change this. Co-op education in higher education is typically limited to some content in courses on broader subjects such as *social economy*, or *social entrepreneurship*. In contrast, agricultural schools typically teach at least one course on agricultural cooperatives. The review of the literature found that there is a need to update the textbooks for agricultural cooperatives such as *Cooperatives in Agriculture* (Cobia, 1989). While this is important, as is evident from this research, the grassroots initiatives are more poorly resources and would have greater impact on the development of new cooperatives.

The USDA is the one area in the US federal government that has dedicated resources to support cooperative education. They do provide the field with the most extensive source of educational resources on their website. State offices which would have provided technical assistance and training in the past, no longer have dedicated co-op staff. Unlike the Department of Housing and Urban Development which does engage in training, the USDA Rural Development program funds the cooperative development centers which are a significant source of cooperative education and technical assistance for rural co-op development. The research found that support for the current publications appears solid and current staff would welcome the opportunity to work with groups that develop resources for underserved groups.

The other noteworthy aspect of the survey findings is that co-op educators are seasoned educators with the majority having over 15 years of experience in the field. A directory of the co-op educators who agreed to be identified is provided in appendix B. Given this finding, it is surprising that while they are knowledgeable about cooperatives, they are not necessarily aware of new materials that have been published in the past few years. In question 7, we included a matrix of materials, many of which were published in the past 5 years. There were a significant number of respondents who were not acquainted with these materials. This can be better understood by examining their recommendations of outstanding materials. Many are quite dated. Some of the older resources have content that is still appropriate. As is occurring with the *Toolbox For Worker Cooperatives* (Northcountry Cooperative Foundation, 2014), resources should be periodically revised. The Association of Cooperative Educators should consider how to provide members updates on new resources both at the annual conference and through the newsletter. There could be a location on the website where links to digital resources could be accessed.

The study documented a wide range of print and web based resources to support co-op education. Quite a lot of new materials have been developed in the past decade. The UN International Year of the Co-op served to catalyze a number of recent studies. New scholarly materials examine how well co-ops have weathered the Great Recession (Nadeau E. G., 2012), the ability of co-ops to serve as a community development tool (Gonzalez & Phillips, 2013), and the impact of globalization (Fulton & Hueth, 2009; Reed & McMurtry, 2009; Zamagni & Zamagni, 2010). These materials are often more scholarly and lack appeal to a general readership.

or even for use in undergraduate college courses. However, they are important resources for integration into public policy discussions. Still lacking are materials that could be used with state and local legislators about the benefits of co-ops according to a survey respondent. Our review of the literature confirmed this gap. A segment of the literature has developed new case discussions of regional or national cooperative movements. Restakis (2010) is illustrative of this type of work. He has developed case descriptions of the Italian cooperative movement in Emilio Romagna, the Japanese consumer and health cooperatives and the Argentinian recovered factory movement. These case examples can be useful for legitimizing the introduction of similar regional approaches here.

We did observe a great deal of redundancy in the published works about cooperatives. Many devoted substantial text to describing what is a cooperative and the history of cooperatives. The new contributions often amounted to a couple of chapters. There have also been a few publications that examine co-ops compared to other business forms (Birchall, 2011; Novkovic & Brown, 2012; Mook, Quarter, & Ryan, 2012; Hansmann, 1996). These are useful resources for incorporation into business school curriculum.

Co-op business development would benefit according to some survey respondents from additional resources about legal frameworks for incorporation such as LLC, L3C and nonprofit versus for profit incorporation. Financial information on co-op financial structure, internal capital accounts for worker co-ops and financial decision making are all inadequate. Case materials that do more than describe a co-op are needed. The case materials should be designed along the lines of leadership trainings with first person narratives to present typical leadership challenges in the co-op setting. Materials that are sector specific would also be welcome.

There has been renewed interest in co-ops as an economic alternative. Many alternative economics websites have incorporated information about co-operatives (see the annotated bibliography). Some of this interest reflects the greater presence of cooperatives in some local economies such as western Massachusetts and northern California. The other noteworthy finding is that co-operators identified among the outstanding resources that they use, websites from other countries (primarily the UK, New Zealand, Canada)

There was limited reference to materials focused on internal aspects of cooperative operations and governance. *Cooperative Workplace Dispute Resolution* (Hoffman, 2012) is the one print publication that has a clear internal focus. This suggests that there is a need to develop more such materials. One survey respondent noted that apart from the Carver model of governance and Roberts' Rules of Order, there is a need to provide co-op boards and members with information about alternatives. Educational materials on alternatives to majority rule such as the *Democracy in Small Groups* which is now out of print are needed (Gastil & Hirshkowitz, 1998)).

Online resources are typically digitized copies of print material. There are some digital sites that were cited which include videos. Resources that are not just "talking heads" or print materials are also important for co-op education. Cultivate.coop has an extensive listing with active links to films and videos about cooperatives. More could be developed with engaging interactive materials for online tutorials. Co-opoly is a very effective teaching tool while being a fun social experience. Simulation type games and online tools should be developed that can be used with co-operators and those new to co-ops. These are the types of resources that would likely appeal to a younger audience of future cooperators.

The literature is also quite limited for nonwhite communities and that can appeal to low income groups. Much of the literature has a strongly "white" middle class appeal. Educational materials for groups such as the Co-op Academy need the materials broken into smaller less text heavy segments. Complex materials need to break the materials into manageable units without oversimplifying the information.

Apart from Nembhard's work on co-ops and African Americans (2004; 2004; 2014) and the Immigrant Worker Owned user manual (Ji & Robinson, 2012), the literature is lacking resources targeted to nonwhite and Latino communities. One interviewee recommended that the foundation consider supporting the adaptation of training materials from Nembhard's newly published book (Nembhard, *Collective Courage*, 2014) for a general audience. Some survey respondents indicated that more is needed to serve these groups. Also another respondent noted the lack of materials in Spanish. There are materials in Spanish that have been developed in Puerto Rico, Spain and Latin America which could be researched and adapted for mainland US settings. This point was reiterated in the interviews. Materials do exist for training in Spanish. However, it appears that there has not been communication between the groups that we interviewed. The

foundation should work with those groups that are working with Latinos and that already have developed materials to make them available beyond the local area. This would allow them to learn from each other and to make their resources available more widely. The foundation should consider holding a convening of groups to facilitate this process.

In conclusion, the discussion of the results points out a number of areas that are worth considering for further development of educational resources. To summarize, they are:

- Fund the development of co-op business materials on financial models, and internal capital accounts; legal incorporation and alternative governance models; conflict management in cooperatives that will serve a general audience
- Support the development of interactive simulation materials that can appeal to a variety of audiences and support the goals of introducing newcomers to co-ops and recurrent education for members and staff of co-ops.
- Host a convening of groups working with Latinos to share resources and learn from one another.
- Develop resource materials that provide a nonwhite and less class bound introduction to co-ops.

In the final section, we outline the limitations of this study and recommend areas for future research on this topic.

## VII. Conclusion

The overall objective of this study was to create an inventory of cooperative educators' materials and to address the following questions:

- How do we assess that the materials are being produced by the best available source?
- How do we assure that the materials are available for use beyond the local or regional organization?
- How do we assure that there is no unnecessary duplication of effort among these organizations?

The results provide meaningful information about cooperative target audiences (*Who is the target audience for these educational programs?*), training materials used, training mode (What is the delivery model for the co-op education and training that you provide? ), the cooperative



sector, the accuracy, appropriateness, and up to date materials used (*The training material is “up to date,” “accurate,” and “appropriate”*).

The study has pointed to some useful criteria for how to assess priorities for the production of new training materials. There is a need to attract developers of new materials that are experienced with working on curriculum for grassroots nonwhite and non-middle class groups. People experienced with cooperatives and in popular education training techniques and with an ability to use participatory training methods should be recruited for this work.

Developers of new co-op education resources should consider working with game designers to develop simulations and interactive resources for web-based materials. While this could potentially be very expensive, it is feasible to work with a university that has a game design major and enlist students in this work.

The co-op business resources are best developed by people who have the requisite skills in finance or business law. Often these materials have been developed under the sponsorship of the cooperative development centers. The centers staffs are familiar with the co-op business model and can provide oversight to the development of these educational materials. The eXtension co-op group has provided this service in updating some materials such as the Zeuli & Cropp text (Zeuli & Cropp, 2004).

### **1. Limitations**

Several limitations are worth mentioning in this research including time constraint, sample size and the prospective of people who have been through trainings. The entire study was conducted in a seven month period. The following steps were followed during this period: Initial contact with The Cooperative Foundation, survey instruments design, approval of the instruments by The Cooperative Foundation board, creation of electronic survey, distribution of the survey, reminder notes to participants—to increase the sample size, data retrieval, data analysis and write up of the report. Seven months is a short period to go through this process. More participants could have taken part in the study if we had extended the data collection time. This could have impacted the results.

The survey and interviews collected information about cooperative educators' perspective on the materials used and the nature of the target audience. The opinions of people who have been through training have not been collected. Their perspective is also relevant for this type of study.

## **2. Future research**

A quantitative study is needed to test the relationship between the characteristics of training materials and the educators' satisfaction with these materials; the following relations must be statistically tested using regression analysis: the relationship between the training material being accurate, appropriate and up to date—as independent variables and educators satisfaction—as a dependent variable. An exploratory study is needed to understand the experience of trainees' about the cooperative materials<sup>2</sup>.

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<sup>2</sup> This work was performed under the sponsorship of the U.S. Department of Commerce, National Institute of Standards and Technology

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## **Appendices**

## Appendix A: Survey Instrument

1. Consent Form for Research
2. What type of organization(s) do you work in to deliver co-operative education?
3. How long have you personally been involved in cooperative education?
4. Who is the target audience for these educational programs?
5. What is the delivery model for the co-op education and training you provide?
6. Target population
7. Co-op sector
8. Appropriate for your intended educational outcomes
9. If not appropriate then...
10. Up to date
11. Accuracy
12. What do you consider to be the most outstanding materials that you use in teaching or training?
  - 12.1(12) Target population
  - 12.2(13) Co-op sector
  - 12.3(14) Appropriate for your intended educational outcomes
  - 12.4(15) If not appropriate then
  - 12.5(16) Up to date
  - 12.6(17) Accuracy
18. Identify the gaps in available resources
19. What cooperative education materials need to be updated?
20. What new cooperative education materials need to be developed

### Appendix B: Directory of Co-op Educators

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## Appendix C: Results of Survey Research

### 1. Questions overview

*1.1. Question 2: What type of organization(s) do you work in to deliver co-operative education?*

The opinion of cooperative experts, community organizers and government officials is important to assess the accuracy of cooperative education materials addressed in this study. Question 2 sheds light on the respondents' involvement in cooperatives and cooperative related organizations. It helps determine the nature of the organizations they work in. The majority of our participants (21%) are actively involved in cooperative education, 16% of them work in community based development organizations, and 12% work in community development centers. The groups that are least represented in the study are the government (3%), international co-op association (2%), and co-op organizations anchored in universities' business schools (2%). The following organizations have not been selected in the survey: Consumer science, University: Public administration/planning department and University: Rural extension department (Table 3). Further clarifications regarding this question are provided in the discussion section of this research.

		What type of organization(s) do you work in to deliver co-operative education?															Total
		State Council	Cooperative development center	Cooperative	Community based development organization	Foundation	National Trade Association	International co-op association	Government	University	University: Agricultural economics department	University: Social sciences department	University: Consumer science department	University: Business School	University: Public administration/planning department	University: Rural extension department	
Who is the target audience for these educational programs? Check all that apply	People interested in starting a co-op	2	12	15	16	3	6	2	3	6	5	3	0	1	0	0	74
	College undergraduates	3	4	13	4	2	1	1	1	5	6	6	0	1	0	0	47
	Graduate students	1	2	10	2	2	2	1	1	5	5	4	0	2	0	0	37
	Youth who are not enrolled in college courses	1	2	12	4	2	1	1	2	2	1	2	0	1	0	0	31
	Community residents	2	8	16	13	3	3	2	3	3	3	2	0	1	0	0	59
	Professionals engaged in development work	2	8	11	9	4	6	1	3	4	3	2	0	0	0	0	53
	Staff of cooperatives	6	6	16	10	3	6	1	2	4	6	0	0	1	0	0	61
	Boards of cooperatives	8	7	16	11	3	6	2	3	4	7	0	0	1	0	0	68
	People seeking knowledge about cooperatives	3	8	18	13	5	6	2	3	6	5	4	0	0	0	0	73
	Other	1	2	5	4	3	1	1	0	1	0	0	0	0	0	0	18
Total	8	12	21	16	5	6	2	3	8	7	7	0	2	0	0	97	

Table 3: Question 2: What type of organization(s) do you work in to deliver co-operative education?



### *1.2 Question 3: How long have you personally been involved in cooperative education?*

The majority of people who took part in this study have certain degree of familiarity with the cooperative material evaluated in the study: 34% of our participants have between 6 and 15 years of experience with cooperative education materials, 23% have more than 20 years experiences with these materials, and 27% of them have between 2 and 5 years of experiences with the same materials (table 4).

Answer	Response	%
<b>Under 2 years</b>	10	10%
<b>2 - 5 years</b>	27	27%
<b>6-10 years</b>	15	15%
<b>11 – 15 years</b>	19	19%
<b>16 -20 years</b>	7	7%
<b>More than 20 years</b>	23	23%
<b>Total</b>	<b>101</b>	<b>100%</b>

Table 4: Question 3: How long have you personally been involved in cooperative education?

### *1.3.Question 4: Who is the target audience for these educational programs?*

Other than being the complement of question 1, question 4 helps understand the motivation for seeking cooperative education. The participants in this study indicate that the majority of the target audience that use and need educational programs consist of people interested in starting a co-op (14%) and people seeking knowledge about cooperatives (14%). This indicates that the majority of people using education material have no prior knowledge about cooperatives (Table 5). This is not to say that people with cooperative background do not use the material; in fact, staff members and boards of cooperatives are the second group that need and use cooperative education materials. The target groups for the cooperative education programs least represented in this study are youth not enrolled in college courses and community residents (Table 5).

		What type of organization(s) do you work in to deliver co-operative education?																
		Total	University: Rural extension department	University: Public administration/planning department	University: Business School	University: Consumer science department	University: Social sciences department	University: Agricultural economics department	University	Government	International co-op association	National Trade Association	Foundation	Community based development organization	Cooperative	Cooperative development center	State Council	
Who is the target audience for these educational programs? Check all that apply	People interested in starting a co-op	74	0	0	1	0	3	5	6	10	2	3	6	15	12	2		
	College undergraduates	47	0	0	1	0	6	6	5	1	1	2	4	13	4	3		
	Graduate students	37	0	0	2	0	4	5	5	1	1	2	2	10	2	1		
	Youth who are not enrolled in college courses	31	0	0	1	0	2	1	2	1	1	2	4	12	2	1		
	Community residents	59	0	0	1	0	2	3	3	3	2	3	13	16	8	2		
	Professionals engaged in development work	53	0	0	0	0	2	3	3	4	1	6	9	11	8	2		
	Staff of cooperatives	61	0	0	1	0	0	0	6	4	1	6	10	16	6	6		
	Boards of cooperatives	68	0	0	1	0	0	7	7	4	2	6	11	16	7	8		
	People seeking knowledge about cooperatives	73	0	0	0	0	4	5	6	3	2	6	13	18	8	3		
	Other	18	0	0	0	0	0	0	0	1	1	1	4	5	2	1		
Total	97	0	0	2	0	7	7	7	8	2	6	16	21	12	8			

Table 5: Question 4: Who is the target audience for these educational programs?

*1.4. Question5: What is the delivery model for the co-op education and training you provide?*

The delivery model for the co-op education and training varies from webinars, classrooms instruction for credit, classroom instruction for certificate, community training to websites. The delivery model vastly used in this study includes community training (28%) followed by websites (20%). The least used model of delivery is the massive open online courses (MOOCS, 0.4%) and classroom instruction for a certificate (7.1%). Some respondents use webinars (13%) or classroom instruction for credits as a model of delivery (13%) (Table 6). A significant portion of the respondents (18%) selected “other” category as a model of delivery. “Other” as a response category for this question has not been clarified (Table 6).

		What type of organization(s) do you work in to deliver co-operative education?															
																	Total
		University: Rural extension department	0	0	0	0	0	0	0	0	0	0	0	0	0	0	34
		University: Public administration/planning department	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
		University: Business School	0	2	0	0	0	0	0	1	1	3	0	1	0	0	32
		University: Consumer science department	0	0	0	0	0	0	0	0	1	6	0	0	0	0	18
		University: Social sciences department	1	7	3	2	4	2	2	3	4	7	0	1	0	0	71
		University: Agricultural economics department	3	6	0	0	1	0	0	5	4	3	0	0	0	0	51
		University	3	5	1	0	0	0	0	6	1	1	0	0	0	0	45
		Government	2	2	2	3	4	2	2	6	4	3	0	0	0	0	
		International co-op association	0	1	0	0	0	0	0	0	1	1	0	0	0	0	97
		National Trade Association	6	5	6	5	6	2	8	7	7	0	2	0	0		
		Foundation	2	5	5	5	6	3	8	7	7	0	2	0	0		
		Community based development organization	3	2	13	15	15	5	8	7	7	0	2	0	0		
		Cooperative	7	15	17	21	21	12	21	21	21	0	2	0	0		
		Cooperative development center	4	15	17	21	21	12	21	21	21	0	2	0	0		
		State Council	2	4	7	15	21	12	21	21	21	0	2	0	0		
What is the delivery model for the co-op education and training that you provide? Select all that a...	Webinars	2	4	7	3	2	6	0	2	3	3	1	0	1	0	34	
	Massive open online courses (MOOCs)	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	
	Classroom instruction for credit	3	1	7	0	0	1	0	0	5	6	7	0	2	0	32	
	Classroom instruction for a certificate	3	2	8	2	0	0	0	0	1	1	1	0	0	0	18	
	Community trainings	5	11	17	13	3	4	2	2	6	4	3	0	1	0	71	
	Websites	1	6	14	6	2	5	1	2	5	5	3	0	1	0	51	
	Other	4	4	15	2	5	5	0	1	3	6	0	0	0	0	45	
	Total	9	12	21	15	5	6	2	3	8	7	7	0	2	0	97	

Table 6: Question 5: What is the delivery model for the co-op education and training you provide?

### 1.5. Question 6: Target population

The target populations taking part in the training are respectively the worker co-ops, start-ups, students and communities. The populations less represented are educated professionals, developers, public, and immigrants. The target groups that are least represented in this study include: food co-ops, employees, co-op members, boards, co-op finance, housing, and agriculture co-ops (Table7).

Answer	Response	%
People interested in starting a co-op	77	76%
College undergraduates	49	49%
Graduate students	37	37%
Youth who are not enrolled in college courses	33	33%
Community residents	61	60%
Professionals engaged in development work	55	54%
Staff of cooperatives	64	63%
Boards of cooperatives	71	70%
People seeking knowledge about cooperatives	77	76%
Other	18	18%

Table 7: Target population

### 1.6.Question 7: Co-op Sector

The co-op education training material most widely used is the USDA co-op educational materials. It is used respectively by the following co-op sectors: agriculture, general cooperatives, food, worker and housing co-ops. The worker co-op toolbox and Co-opoly were second and are used equally. The worker co-op toolbox is used respectively by worker co-op, general cooperatives, agriculture, and food co-ops; it is not used by housing co-ops. Co-opoly is primarily used by general cooperatives, followed by workers, food, agriculture and housing co-ops.

The materials less used are the scholarly resources. (Table 8).

<b>Question</b>	<b>Agriculture</b>	<b>Food Co- ops</b>	<b>Housing</b>	<b>Worker</b>	<b>General</b>	<b>Other</b>	<b>Total Responses</b>
<b>Worker Co-op toolbox</b>	4	1	0	37	11	4	57
<b>Lawless &amp; Reynolds case studies text</b>	5	10	0	1	7	4	27
<b>USDA co-op educational materials</b>	42	17	4	6	37	11	117
<b>Cooperative Housing Toolbox</b>	1	0	25	2	7	1	36
<b>Food Co-op Initiative on-line resources</b>	1	33	0	4	8	3	49
<b>Immigrant Worker Owned Cooperatives manual</b>	2	0	0	24	3	5	34
<b>Zeuli &amp; Cropp text</b>	7	1	0	4	19	7	38
<b>Gonzales &amp; Phillips text</b>	1	0	0	1	8	4	14
<b>Birchall text, People Centred Business</b>	2	1	1	3	8	3	18
<b>Sanchez Bajo &amp; Roelant text Capital &amp; the Debt Trap</b>	1	0	0	2	6	5	14
<b>Self Assessment Tool for Start Up Cooperatives</b>	2	2	2	5	13	2	26
<b>Co-opoly</b>	3	7	3	16	21	7	57
<b>Curl For All The People</b>	1	0	1	8	15	4	29

Table 8: Co-op Sector

*1.7. Question 8.1: The training material is “up to date”*

Most participants agreed that the “worker co-op toolbox” is up to date, along with the immigrant worker owned cooperatives manual. Many participants found that the USDA co-op educational materials were up to date, but there were also a few who expressed uncertainty about the USDA materials. Most participants strongly agreed that both the Food Co-op Initiative’s online resources and Co-opoly were up to date, and those who disagreed were not significant in number (Table 9).

*1.8. Question 8.2: The training material is “accurate”*

Participants either strongly agreed or agreed that the materials were accurate. Materials cited as being accurate include: worker co-op toolbox, USDA co-op educational materials, Food Co-op Initiative on-line resources, and Co-opoly (Table 9).

*1.9. Question 8.3: The training material is “appropriate” for the intended use*

By and large, the participants agreed that the cooperative education materials presented in this study were appropriate for intended use. Some materials are found to be more appropriate than others. The most “appropriate” materials include: worker co-op toolbox, USDA co-op educational materials, Food Co-op Initiative on-line resources and Co-opoly. A fuller discussion of this topic can be found in the discussion of the results section. (Table 9).

	Strongly disagree			Disagree			Neutral			Agree			Strongly Agree		
	Appropriat	Up-to-Date	Accuracy	Appropriat	Up-to-Date	Accuracy	Appropriat	Up-to-Date	Accuracy	Appropriat	Up-to-Date	Accuracy	Appropriat	Up-to-Date	Accuracy
Worker Co-op toolbox	1	0	0	1	0	0	8	9	4	21	17	15	14	3	8
Lawless & Reynolds case studies text	1	0	0	1	1	0	10	7	5	5	3	4	2	0	0
USDA co-op educational materials	0	0	0	4	2	1	14	18	4	21	9	17	9	2	6
Cooperative Housing Toolbox	1	0	0	3	0	0	6	5	4	11	8	7	6	2	2
Food Co-op Initiative on-line resources	1	1	1	3	1	0	6	1	1	8	8	8	14	10	9
Immigrant Worker Owned Cooperatives manual	2	0	1	4	2	2	7	2	6	10	9	4	4	2	2
Zeuli & Cropp text	0	1	0	1	0	0	9	2	2	11	8	3	5	1	4
Gonzales & Phillips text	1	0	0	1	0	0	10	2	2	0	1	1	1	0	0
Birchall text, People Centred Business	1	1	1	1	0	0	8	2	2	4	4	3	1	0	1
Sanchez Bajo & Roelant text Capital & the Debt Trap	0	0	0	3	0	0	7	2	2	2	1	1	0	1	1
Self Assessment Tool for Start Up Cooperatives	0	0	0	0	0	0	5	1	1	10	6	5	0	0	0
Co-opoly	0	0	0	1	0	1	8	2	5	8	8	8	10	9	3
Curl For All The People	1	1	1	1	0	0	7	3	2	9	7	4	2	0	0

Table 9: Cooperative Education materials are Accurate, up-to-date, and appropriate



*1.10. Question 9: If not appropriate then...*

Some materials are found to be inappropriate for the training (Table 10) The reason mentioned by many participants to explain why these materials are inappropriate: “the focus of the material was not appropriate for the intended audience.”

Table 10: Materials found to be inappropriate

<b>Question</b>	<b>writing too academic</b>	<b>reading level too difficult</b>	<b>reading level too basic</b>	<b>Focus of material not appropriate for intended audience</b>	<b>Total Responses</b>
<b>1. Worker Co-op toolbox</b>	3	0	0	2	5
<b>2. Lawless &amp; Reynolds case studies text</b>	1	0	0	5	6
<b>3. USDA co-op educational materials</b>	1	1	1	6	9
<b>4. Cooperative Housing Toolbox</b>	2	0	0	2	4
<b>5. Food Co-op Initiative on-line resources</b>	3	0	0	2	5
<b>6. Immigrant Worker Owned Cooperatives manual</b>	1	0	0	6	7
<b>7. Zeuli &amp; Cropp text</b>	2	1	0	2	5
<b>8. Gonzales &amp; Phillips text</b>	3	0	0	1	4
<b>9. Birchall text, People Centred Business</b>	3	1	0	1	5
<b>10. Sanchez Bajo &amp; Roelant text Capital &amp; the Debt Trap</b>	3	0	0	2	5
<b>11. Self Assessment Tool for Start Up Cooperatives</b>	0	0	1	0	1
<b>12. Co-opoly</b>	0	0	0	3	3
<b>13. Curl For All The People</b>	1	0	1	4	6

*1.11. What do you consider to be the most outstanding materials that you used in teaching or training?*

The majority of participants agree that materials 1, 2, 3 and 4 are accurate, up to date, and appropriate for intended use. There is no agreement or disagreement regarding the accuracy and appropriateness of materials 5, 6, 7, 8, 9 10. (See the appendix for a complete list of accurate, appropriate and up to date materials).

## **2. Cross Tabulations**

Cooperative educators from 15 different organizations or co-op related organizations (University: Rural extension department, University: Public administration/planning department, University business school, University: Consumer science department, University: Social sciences --Economics, sociology, political science, etc.--department) conduct training workshops with various audiences. The audience knowledge of the cooperative system ranges from some knowledge about cooperatives to being a novice in the field. Specific groups that attend the workshops include: people interested in starting a co-op, college undergraduates, graduate students, youth not enrolled in college courses, community residents, professionals engaged in development work, staff of cooperatives, boards of cooperatives, and people seeking knowledge about cooperatives. Two cross tabulations of the data were run: the first (1) explains the relationship between the organizations the cooperative educators belong to and the nature of their target audience and the second (2) explains the relationship between the organizations the cooperative educators belong to and the delivery mode for the co-op education and training.

*2.1. Cross tabulation: Relationship between co-op educators' organizations and the nature of their target audiences*

In this cross tabulation the three educators groups that have trained the most audiences are the cooperative development center, cooperatives, and the community based development organizations. Among these three groups cooperatives have trained the most people/audiences. The cooperatives' audiences are: (1) people seeking knowledge about cooperatives, (2) board of cooperatives, (3) staff of cooperatives, (4) community residents, (5) people interested in starting a co-op, (6) college undergraduates, (7) youth not enrolled in college courses, (8) professionals engaged in development work, and (9) college graduates. The second group that has conducted the most training is the community based development organization. Their audiences include: (1)

people interested in starting a co-op, (2) community residents, (3) boards of cooperatives, and (5) staff of cooperatives. The third group is cooperative development center. Their most significant target audience is people interested in starting a co-op. The group (target audience) most commonly trained by the 15 organizations or co-op related organizations is people interested in starting their own co-ops (74 educators have indicated that they trained this target audience). The second group of focus is people seeking knowledge about cooperatives (73 educators have indicated that they trained this target audience). The third group with the most training is the boards of cooperatives (73 educators have indicated that they trained this target audience). The groups with the least training are youth who are not enrolled in college courses (31 educators have indicated that they trained this target audience), college undergraduates (37 educators have indicated that they trained this target audience), and graduate students (47 educators have indicated that they trained this target audience) (Table 11).

*(Notice: One aspect of table 11 was previously mentioned under table 3. This aspect was: What type of organization(s) do you work in to deliver co-operative education?).*

		What type of organization(s) do you work in to deliver co-operative education?															
		Total	University: Rural extension department	University: Public administration/planning department	University: Business School	University: Consumer science department	University: Social sciences department	University: Agricultural economics department	University Government	International co-op association	National Trade Association	Foundation	Community based development organization	Cooperative	Cooperative development center	State Council	
Who is the target audience for these educational programs? Check all that apply	People interested in starting a co-op	74	0	0	1	0	3	0	3	5	6	3	15	12	2		
	College undergraduates	47	0	0	1	0	6	6	5	1	1	4	13	4	3		
	Graduate students	37	0	0	2	0	4	5	5	1	2	2	10	2	1		
	Youth who are not enrolled in college courses	31	0	0	1	0	2	1	2	1	2	4	12	2	1		
	Community residents	59	0	0	1	0	2	3	3	2	3	13	16	8	2		
	Professionals engaged in development work	53	0	0	0	0	2	3	4	1	6	9	11	8	2		
	Staff of cooperatives	61	0	0	1	0	0	6	4	2	6	10	16	6	6		
	Boards of cooperatives	68	0	0	1	0	0	7	4	3	6	11	16	7	8		
	People seeking knowledge about cooperatives	73	0	0	0	0	4	5	6	3	6	13	18	8	3		
	Other	18	0	0	0	0	0	0	1	0	1	4	5	2	1		
	Total	97	0	0	2	0	7	7	8	3	2	6	21	12	8		

Table 11: Relationship between co-op educators' organizations and the nature of their target audiences

## *2.2. Cross tabulation: Relationship between co-op educators' organizations and the delivery mode for the co-op education and training*

The cooperative development center, cooperatives and community based development organizations have mostly used webinars, classroom instruction for credits, classroom instruction for a certificate, community trainings, and websites to deliver the co-op education and training.

When considering all 15 organizations or co-op related organizations, “community training” is the main delivery tool used (71 educators have indicated that they used this tool), the second delivery tool used is a website (51 educators have indicated that they used this tool), and the third most used delivery tool is webinar (34 educators have indicated that they used this tool). The least used delivery tools are: massive open online courses (MOOCs) (1 educators have indicated that they used this tool), and classroom instruction for a certificate (18 educators have indicated that they used this tool) (Table 12).

*(Notice: One aspect of table 12 was previously mentioned under table 6. This aspect was: What is the delivery model for the co-op education and training you provide?)*

		What type of organization(s) do you work in to deliver co-operative education?																
		Total	University: Rural extension department	University: Public administration/planning department	University: Business School	University: Consumer science department	University: Social sciences department	University: Agricultural economics department	University	Government	International co-op association	National Trade Association	Foundation	Community based development organization	Cooperative	Cooperative development center	State Council	
What is the delivery model for the co-op education and training that you provide? Select all that a...	Webinars	34	0	0	1	0	1	3	3	2	0	6	2	3	7	4	2	
	Massive open online courses (MOOCs)	1	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	
	Classroom instruction for credit	32	0	0	2	0	7	6	5	0	0	1	0	0	7	1	3	
	Classroom instruction for a certificate	18	0	0	0	1	1	1	1	0	0	0	0	2	8	2	3	
	Community trainings	71	0	0	1	0	3	4	6	2	2	4	3	13	17	11	5	
	Websites	51	0	0	1	0	3	5	5	2	1	5	2	6	14	6	1	
	Other	45	0	0	0	0	0	6	3	1	0	5	5	2	15	4	4	
	Total	97	0	0	2	0	7	7	8	3	2	6	5	15	21	12	9	

Table 12: Relationship between co-op educators' organizations and the delivery mode for the co-op education and training

## Appendix D: Annotated Bibliography of Cooperative Educational Literature Cited in the Study

### Published Scholarly Print Materials Suitable for Formal Education Settings

Birchall, J. (2011). *People-Centred Businesses*. New York: Palgrave McMillan.

People–Centred Businesses provides an in-depth examination of member owned businesses drawing on examples worldwide. It is a very readable text that examines these enterprises across the cooperative sectors from consumer co-ops to credit unions; mutual insurance; agricultural co-ops and benevolent societies. The focus of his work is on member participation and the prospects for the sustainability of theses member owned businesses. While this is a scholarly discussion of member owned businesses, it is an important contribution to the literature for the analysis of the importance of member involvement for these firms to be sustainable.

Birchall, J. (1997). *The international co-operative movement*. Manchester University Press.

Birchall gave an exhaustive account of consumer co-op origin. He explained how the Rochdale society of equitable pioneers created in 1844 served as the first consumer cooperative business model. A group composed of weavers and skilled workers had opened a shop and established rules that governed their business. The cooperative movement would later get inspiration from this organization to launch a campaign for the creation of what is known today as co-op. The author also pointed out the existence of groups created in 1760 in England that had shown principles and values of cooperatives; notably the shipwrights of Chatham and Woolwich, England.

Birchall, J. (1994). *Co-op the people's business*. Manchester University Press.

In this book, Birchall provided the readers with different views of business organizations. He contrasted the role of traditional business owners and members' ownership in cooperatives. Using socio economic theories he described the genesis, growth and decline of business organizations. He also highlighted the success of various co-op organizations including co-operative banks, credit unions and mutual insurance.

Briggeman, B., & Jorgensen, Q. (2009). Cooperative members' preferences for patronage refunds. *Agricultural Finance Review*. 69, 89-97.

In this research paper, Brian Briggeman reports the findings of a study conducted to investigate cooperative members preferences for patronage. Briggeman used a survey tool previously developed with Jorgensen to measure patronage preferences among east central farm credit borrowers from Oklahoma. He discovered that farm credit member borrowers prefer cash patronage to lower fixed interest rate patronage.

Carver, J. (2006). *Boards that Make a Difference*, San Francisco: Jossey-Bass.

This has been the “bible” of board governance for many cooperatives dating back to the 1980’s. Policy governance is the preferred governance method in many co-op settings in the USA. This is an important text for members and boards who are using Carver’s governance model. Each chapter is designed to guide the reader through the various elements of policy governance and provides examples of how to develop policies for establishing policy governance in an organization. It is intended for board members of organizations but it is not written specifically for cooperatives.

Case, J. & Taylor, R. C. R. (Eds.)(1979). *Co-ops, communes & collectives: experiments in social change in the 1960s and 1970s*. New York, NY : Pantheon Books.

While this is quite old as a resource, there is a chapter by David Moberg, titled “Experimenting with the Future: Alternative Institutions and American Socialism”. A participant identified this resource as very useful.

Cobia, D. W (Ed.) (1989) *Cooperatives in Agriculture*. Upper Saddle River, NJ: Prentice-Hall. Despite the age of this resource, it was cited in the survey as a suitable text for undergraduate students studying about agricultural cooperatives.

Crowell, E. (2009). *Final Management Audit for Master of Management: Co-Operatives and Credit Unions*. Saint Mary’s University, Halifax, Nova Scotia, Canada.

Curl, J. (2009). *For All the People*. Oakland: PM Press.

In 1980, Curl published an early draft of this book, titled “History of Work Cooperation in America.” This is a reworked and rewritten history that provides a much more detailed history of cooperatives in America. The book is structured with two parts: part I examines cooperatives and cooperative movements; part II examines communalism. The history of cooperatives begins with the practice of cooperation, collectivity and communalism in Native American society and ends with an overview of the movement today. It is intended for a general audience.

Deller, S., Hoyt, A., Hueth, B., & Sundaram-Stukel, R. (2009). *Research on the economic impact of cooperatives*. Report prepared by the University of Wisconsin Center for Cooperatives. This study highlights the role of co-ops in the United States economy. The authors emphasized the importance of co-ops; their influence on other businesses and citizens. They offered an exhaustive description of legal and economic characteristics of co-ops, description of tools used to measure co-ops’ activities and their influence of employment and income.

Dow, G. K. (2003). *Governing the Firm*. New York: Cambridge University Press.

Why are stockholder owned firms common and worker controlled firms rare? Dow examines the literature on worker controlled firms and develops an economic analysis based on economic theory, statistical analysis and case studies. He concludes with policy recommendations for how



to foster greater labor owned firms. This is an important detailed discussion of the challenges to employee ownership. The audience for this book is scholarly readers with an interest in promoting greater policy consideration of employee ownership.

Erdal, D. (2011). *Beyond the Corporation: Humanity Working*. Vintage Digital.  
England.

This book sheds light on the successes of cooperatives as a business model. Through a series of interviews and a number of case studies the authors refuted the argument that members' ownership could be prejudicial to cooperatives. Not only members' ownership is vital for cooperatives it also is one of the contributing factors to sustainable growth, high productivity and innovative responses to market challenges.

Fairbairn, B., Bold, J., Fulton, M., & Hammond Ketilson, L. (1991). *Co-operatives and Community Development: Economics in Social Perspective*. Saskatoon, Saskatchewan: Centre for the Study of Cooperatives, University of Saskatchewan.

This book was cited as a valuable study to use with undergraduate and graduate students. It examines what cooperatives are and how they can be used in rural communities from the perspective of community economic development theory as a way to create a sustainable local economy in spite of the pressures of global restructuring of society (Lord Gaber, 1992).

Feldman, J. M., & Gordon, N. J. (2002). *From Community Economic Development and Ethnic Entrepreneurship: The Cooperative Alternative*. University of Umea, Department of Sociology. Umea, Sweden: PfMI.

This report is suitable for use with undergraduate and graduate students. Alternative democratic models of development that are community led/community controlled are the focus of the report. The study examines the Mondragon Cooperatives, the decline of the Swedish cooperatives; the Urban Homesteading Assistance Board in the US and Russia; and franchise cooperatives. It is suitable for use with graduate and undergraduate students.

Fulton, M. E., & Hueth, B. (2009). Cooperative Conversions, Failures and Restructurings: An Overview. *Journal of Cooperatives*, vol. 23 , i-xi.

This is an academic article reviewing empirical data on 10 years of cases. The article is suitable according to a survey respondent for use with undergraduates and graduate students.

Gonzalez, V., & Phillips, R. G. (Eds.)(2013). *Cooperatives and Community Development*. New York: Routledge

This edited collection draws from previously published articles in the Journal of Community Development. The chapters are peer-reviewed studies of the role of cooperatives in community development. The appropriate audience for this book would be readers of scholarly work with an interest in the impact of cooperatives in community development. The articles tend towards a

more theoretical and empirical consideration of recent research about how cooperatives serve to foster civil society and contribute to the economic well-being of their communities. The chapters in the text with a USA focus are rural case examples. This would be an excellent text for students in rural development and planning programs of study.

Gordon Nembhard, J. (2004, August). Cooperative Ownership and the Struggle for African American Economic Empowerment. *Humanity & Society*, 28(3), 298-321.

Gordon Nembhard, J. (2004). Non-Traditional Analyses of Cooperative Economic Impacts. *Review of International Co-operation*, 97(1), 6-21.

These two articles were recommended in the survey as useful for professionals engaged in co-ops and in development.

Gordon Nembhard, J. (2012). *Collective Courage: A History of African American Cooperative Economic Thought and Practice*. University Park: The Pennsylvania State University

Gordon Nembhard provides a very well researched and thorough history of the African American experience with cooperatives. Each chapter integrates case discussions of cooperatives and mutual assistance organizations of the historic period. This is a very thoroughly researched and documented study. It provides a compelling rationale for the value of cooperatives in a society where racism and economic marginalization were a fact of life for African Americans while debunking the myths of their failures. This resource will work very well in scholarly instruction about the place of cooperatives in the efforts of Blacks to cope with economic hardship and social marginalization.

Hansmann, H. (1996). *The Ownership of Enterprise*. Cambridge, MA: Harvard University Press. This is a scholarly comparative study of forms of enterprise ownership. The author provides a descriptive comparison of the forms. Hansmann considers how the ownership affects the economic performance as well as the social organization of the enterprise.

Hoffman, E. A. (2012). *Co-operative Workplace Dispute Resolution*. Surrey: Gower Publishing Ltd.

This is a recently published work of interest to students and scholars according to one survey respondent. This book examines matched pairs of worker cooperatives and conventional businesses in three different business sectors: coal mining, taxicabs and wholesale organic foods.

McKinsey and Company (2012). *McKinsey on cooperatives*. McKinsey and Company. Chicago, IL.

In this report, the authors offered a series of reflections on challenges and opportunities that cooperative organizations encounter. They specifically discussed cooperatives' growth, management, organizational challenges and global trends they face. They pointed out that cooperative grow at the same rate as publicly held companies. However cooperative growth in market share gains is more sustainable than the growth of public companies. Cooperative growth is predicated on the unique experience they offer their members and on the attractiveness of

adjacent market. The report is written to provide useful information to cooperative managers and senior executives.

McLanahan, J. a. (1990). *Cooperative-credit Union Dictionary and Reference*. 1990. Richmond, KY: Cooperative Alumni Assn.

A participant of the survey identified this as an outstanding resource for boards and general reference purposes.

Merret, C., & Walzer, N. (1999). *Bibliography of cooperatives and cooperative development*. Illinois Institute for Rural Affairs. Macomb, IL.

The authors received funding from the USDA to develop a document that addresses new information in cooperatives. The document highlights also the theory and origin of cooperatives.

Mook, L., Quarter, J., & Ryan, S. (Eds.). (2012). *Business with a Difference*. Toronto: University of Toronto Press.

This edited collection of articles examines the range of organizations and activities that comprise the social economy. This book situates cooperatives within the larger field of social enterprises. It is a useful text for understanding how cooperatives fit into the broader context of community based and social enterprises. The sections on co-ops examine the Canadian credit union movement; the performance of non-financial cooperatives in Canada from 1955 to 2005; and the role of education in nurturing the social economy. This is written for a faculty and students of social enterprise as well as staff and boards of those organizations.

Novkovic, S., & Brown, L. (Eds.). (2012). *Social Economy*. Sydney, Nova Scotia: Cape Breton University Press.

This edited work examines the social economy in the Atlantic region of Canada. Cooperatives have been a strong segment of that economy. They are examined in this book along with nonprofits and other social enterprises. Two chapters focus specifically on evaluation and performance measures in worker co-ops and consumer co-ops.

Reed, D., & McMurtry, J. (Eds.). (2009). *Co-operatives in a global economy: the challenges of co-operation across borders*. Newcastle Upon Tyne: Cambridge Scholars Publishing.

The various chapters of this book examine international case examples of how cooperatives are addressing the challenges of working in a globalized economy. Case discussions include Mondragon, Argentina, the Fair Trade movement and the social economy in Quebec. This is recommended for use with graduate students.

Restakis, J. (2010). *Humanizing the Economy*. Gabriola Island, BC: New Society Publishers. In teaching about cooperatives, it is often helpful to point people towards successful international cases that can inspire and motivate them to achieve their goals. This study examines international cases of successful co-op development, including: worker co-ops in Emilia

Romagna in Northern Italy; recovered factories in Argentina, consumer co-ops in Japan, sex workers in India and fair trade agricultural co-ops in Sri Lanka. Restakis set out to write an accessible book for a general readership. The cases are compelling and challenge us to think about how we can learn from these experiences.

Sanchez Bajo, Claudia & Roelants, Bruno (2011). *Capital and the Debt Trap*. New York: Palgrave McMillan.

This book highlights the strong performance of cooperatives during the recent financial crisis in the United States. The authors explained the causes of the global crisis. They specifically investigated the shift of power on the financial market, the influence of micro and macro-economic factors on financial institutions performance during the crisis. They explained how co-op organizations are viable model that can help prevent future crisis.

Zamagni, S. & Zamagni, Vera. (2010). *Cooperative Enterprise: Facing the Challenge of Globalization*. Northampton, MA: Edward Elgar Publisher.

The survey participant who recommended this book indicated that the second chapter, "The Birth of Cooperative Enterprise" is especially worthwhile. The book also includes an overview of various cooperative movements by nation. There is a chapter dedicated to the Italian cooperative movement. The two final chapters examine the economic performance of cooperatives and the governance of cooperatives. This is recommended for use with graduate students.

Zeuli, K.A.. & Cropp, R. (2004). *Cooperative Principles & Practices in the 21st Century* Madison, WI: Cooperative Extension of the University of Wisconsin-Extension.

This is a thorough overview of cooperatives and works very well as a textbook for an introductory course. It includes a discussion of the history of co-ops as well as the laws that govern co-ops in the US. It has a generic focus and can serve an audience with a variety of interests in co-op development. It is best suited to a graduate level course.

### **Published for General Readership & Technical Resources Suitable for Nonformal Education and Training**

Baldwin, V. P. (2004). *Legal Sourcebook for California Cooperatives: Startup and Administration*. Davis: University of California, Center for Cooperatives. Retrieved from: <http://sfp.ucdavis.edu/files/143718.pdf>

This is a very useful sourcebook that was identified through the survey as an outstanding resource for boards and startups. The sourcebook includes information for incorporation as well as for operational issues. As noted in the next citation, there is a more recent updated sourcebook by the same author.

Baldwin, V. (2009). *Co-op Incorporation Sourcebook-Start-up and Boards: Legal sourcebook for California cooperatives: Start-up and administration*. University of California Agriculture and Natural Resources Communication Services. Oakland, CA.

Information provided by Baldwin in this book serves specifically two audiences. First, the author offers background information to groups that are interesting in creating co-ops. Second, he provides useful administrative information to existing co-ops interested in new management tools and rules, especially bylaw. For instance, California consumer cooperative organizations are not created under the nonprofit statutes of the California corporation code therefore co-ops find it more difficult to get tax-exempt status. This book clarifies the issue. It also provides information to attorneys handling co-op issues.

Coontz, E. K. (2003). *Bringing Families Together: A Guide to Parent Cooperatives- Start-up, Co-op Boards and General*. Center for Cooperatives. University of California. Retrieved February 17, 2014, from [http://www.uwcc.wisc.edu/pdf/bft\\_1.pdf](http://www.uwcc.wisc.edu/pdf/bft_1.pdf)

This manual developed by the CA Center for Cooperatives is a step-by-step manual for groups considering starting a cooperative day care. Case examples are provided for the various ways to structure a cooperative depending on who the co-op members will be.

Hansen, G., Coontz, K., & Malan, A. (1997). *Steps to starting a worker co-op*. Center for Cooperatives: University of California. Davis, CA.

This book describes 8 steps in the creation of a successful co-op including, collect information about potential needs in the community, design the co-op's mission, conduct a feasibility test, prepare a business plan, prepare legal documentation, hold the co-op first meeting, implement management and start co-op operation. The authors highlighted the principles, values and benefits of creating cooperatives. The authors highlighted the nature of worker co-op.

Honingsberg, P., Kamoroff, B., & Beatty, J. (1982). *We Own It*. Laytonville, CA: Bell Springs Publishing.

This is an excellent resource for groups who are new to co-ops and considering starting a co-op. While the materials are dated and would benefit from a reissuance with updated information about legal forms of incorporation, it provides the reader with easy to adapt templates for bylaws. It also includes state-by-state cooperative corporation laws.

Ji, M., & Robinson, T. (2012). *Immigrant Worker Owned Cooperatives: a User's Manual*. Denver: El Centro Humanitario & Green Cleaning for Life.

This resource was included in the detailed listing of resources and was the one resource that met mixed reviews. It was developed as a resource to guide the development of worker co-ops in immigrant communities.

Kelly, M & Korten, D.C. (2012). *Owning Our Future: The Emerging Ownership Revolution*. San Francisco: Berrett Koehler Publishers.

Kelly and Korten examine the role of various community economic development institutions and alternative economics including cooperatives. They develop a theoretical model of the “generative economy” which they then use for examining the various alternatives. This was recommended for co-op members, college courses and a general readership.

Nadeau, E. G., & Thompson, D. (1996). *Cooperation Works!: How people are using Cooperative Action to Rebuild Communities and Revitalize the Economy*-. Rochester, MN: Lone Oak Press.

Nadeau, E. G. (2012). *The Cooperative Solution: How the US can tame recessions, reduce inequality, and protect the environment*. Madison, WI: [egnadeau@inxpress.net](mailto:egnadeau@inxpress.net)

Both of these two books were identified by a respondent to the survey as a valuable tool in co-op education for undergraduate and graduate students and for general readership. *Cooperation Works!* provides readers in part one of the book with a chapter by chapter discussion of cooperatives in different sectors. Part 2 examines how cooperatives are able to meet human needs for housing and to serve the needs of the disabled. In the final section, cooperatives are examined from the perspective of community development.

The second book, *The Cooperative Solution*, was written after the Great Recession and during 2012, the International Year of Cooperatives. It examines the current place of cooperatives in the US and potential of cooperatives to play an even greater role in American society. As with the earlier book, this is very readable for a general audience and for college students.

NASCO (2008). NASCO: Students of cooperation. *NASCO Cooperative Organizer's Handbook* This book highlights the importance of co-ops by stressing their origin. The strength of cooperatives is rooted in their origin. Cooperatives are democratic organizations in which its members share the power. Many groups including student's organizations can take inspiration from the co-op model to create organizations that would best serve students' interests. Students organizations built on the co-op model would help them understand the value of their education in the real world.

Pahl, G. (2012). *Power from the People*. White River Junction, VT: Chelsea Green Publishing. This is a book about how communities can generate their own energy. It includes consideration of how cooperatives are already engaging in these efforts. A survey participant recommended this for use with college courses, general readership and co-op members.

Phillips, M., & Rasberry, S. (2001). *Marketing without advertising*. (3<sup>rd</sup> Ed.)

In this book, the authors demonstrated the failure of advertising in today's market. Their contention is predicated on the assumption that it matters more to focus on consumer loyalty than to spend a colossal amount of money advertising. Advertising does not create consumer loyalty. The contributing factors to consumer loyalty are positive customer experience, trust in product benefits, effective pricing strategy and employee satisfaction. These factors could ultimately lead to sustainable competitive advantage.

Smith, J., Puga, R., & MacPherson, I. (Eds.). (2005). *Youth Reinventing Co-operatives*. Victoria, BC, Canada: British Columbia Institute for Co-operative Studies.

Cooperatives need to reach young people to attract them into existing co-ops and to encourage them to develop new ones. This book was written with support from the International Cooperative Alliance; the International Labor Organization (ILO) and the Canadian Cooperative Association. The study includes case studies of youth cooperatives and explores how to effectively engage youth to learn about the cooperative model. This book works very well for a general audience.

Stolarski, L. Discussion *Course on Cooperatives*. Pittsburgh: East End Food Co-op publisher

This is a curriculum for self-directed study groups in cooperatives interested in recurrent education and to promote greater member participation. According to the survey, it works well for intellectuals, co-op enthusiasts and advocates. The guide covers topics about cooperative economics, history and philosophy. The discussion format is centered around carefully selected short readings to foster discussion and a learning community within a cooperative.

Thompson, D. J. (1994). *Weaver of Dreams*. Davis, CA: Center for Cooperatives, University of California.

This was published for the 150<sup>th</sup> anniversary of the modern cooperative movement. It is a history of the Rochdale Pioneers and the philosophy that is the underpinning of the cooperative movement. It is recommended for courses with college students and for general readers interested in continuing education.

### **Web based resources**

**American Worker Cooperative** <http://www.american.coop/category/tags/how>

This site was developed by John Whitman with contributions of a number of colleagues to provide a centralized wiki for anyone interested in how to start a worker co-op. There are links to a wide range of topics related to the successful development of worker co-ops. One source identified through the survey is “28 Questions for Your Worker Cooperative to Answer Before Meeting with Your Incorporation Lawyer.” Another resource that can be accessed from this site that was cited as worthwhile is *Think Outside the Boss*. Resources on this site are appropriate both for developing curriculum in higher education as well as for a general audience.

**Cooperative Development Services** is a consulting group that provides a broad range of services for startups and existing co-ops. The following resources were identified as useful resources on their website

- CDS 4 corners 3 stages- people starting coops
- CDS Consulting Co-op- Food co-op staff and board
- CDS Consulting Coop library- People starting Co-ops
- CDS Consulting Website- People Starting Co-ops.

The website includes a section of webinars for food co-op startups.

<http://www.cdsconsulting.coop/startup-webinar>

**Cooperative Development Institute** is a cooperative development center servicing New York and New England. The website includes [CDI's How to Start a Co-op Packet](#) PDF file which outlines the basics of co-operatives and has other resources for groups interested in starting a cooperative. In addition, CDI maintains a blog that links to educational opportunities, job opportunities and various links to introduction sites and toolboxes-

<http://cooperativedevelopmentinstitute.blogspot.com>

**The Cooperative Grocer Network** (<http://www.cooperativegrocer.coop/>) is a bimonthly trade publication, *the Cooperative Grocer* and a resource rich website of archived materials for the food co-op community.

**Cooperatives UK** (<http://www.uk.coop/start-co-op>) is a UK cooperative website with information to aid in starting a co-op. The website includes links to information for startups and conversions of existing business, case examples and a directory of UK cooperatives.

**The Data Commons Project** (<http://datacommons.find.coop/about>) is a cooperative of data-sharing organizations that promote the cooperative economy. The site is a directory of alternative economic initiatives, including cooperatives.

**David Ellerman website** (<http://www.ellerman.org/>)

This website is maintained by David Ellerman, an economist and cofounder of the ICA Group. This site includes his writings on democratic firms and the labor theory of property. This site is intended for advanced theoretical discussions of labor economics and employee ownership.

**EXtension** (<http://www.extension.org/cooperatives>) is a web based collaborative site of Land Grant universities. The site includes a wide range of resources for cooperative extension services to serve agricultural interests. It also has co-op content where collaborative members can share research-based knowledge on the cooperative business model in agriculture and rural communities. The target audiences according to the survey are: agriculturists, general readers, youth, and instructors.

**The Food Co-op Initiative** (<http://www.foodcoopinitiative.coop/>) is a foundation that provides a rich array of resources for groups that want to start a food co-op. The website includes webinars as well as information structured around to FCI's development model. There are step-by-step guides, a financial toolbox; templates and specialized information to aid groups in developing their governance, budgets and planning of the startup. The site also provides links to other useful resources.



**The International Cooperative Alliance** (<http://ica.coop/>) is the official web site of the alliance of cooperatives at a global level. The website provides information and statistics about cooperatives worldwide, basic information about cooperatives, co-op identity, co-op legislation and proceedings and resources from past regional and international conferences. The ICA developed collected stories of co-ops from around the world and in different co-op sectors for the International Year of the Cooperative in 2012.

**NCB Capital Impact** (<http://www.ncbcapitalimpact.org/>) is a community development financial institution with a commitment to co-op development. Their website includes general information about what is a co-op and a guide to housing co-op development. There are also links to other co-ops sites.

**National Cooperative Business Association (NCBA)** (<http://www.ncba.coop/>) is the national trade association for cooperatives in the USA. It provides cross sector education, training and advocacy. Their web based resources include information about the various co-op sectors; an archive of webinars; and an events calendar of co-op conferences. Some resources are restricted to members.

**National Farmers Union** (<http://www.nfu.org/cooperation/resources/links>) provides links to the state councils and other co-op resources, and a history of cooperatives.

**Northcountry Cooperative Foundation.** (<http://northcountryfoundation.org/library/>) promotes the development of communities through cooperatives. The foundation has supported the development of training materials to support worker and housing co-op development.

#### **Manufactured Housing publications**

- Building Value and Security for Homeowners in "Mobile Home Parks:" A report on Economic Outcomes
- Manufactured Housing in Minnesota: Overview and Policy Challenges
- Met Council MHP Statistics
- Manufactured Housing Top 10 Truths
- Why Advocates Need to Rethink Manufactured Housing

#### **Toolboxes**

- Cooperative Housing Toolbox: A Practical Guide for Cooperative Success
- Cooperative Housing Development Toolbox: A Guide for Successful Community Development
- A Practical Guide to Community Supported Agriculture on Reservations

#### **Worker Cooperative Toolbox**

#### **In Good Company: The Guide To Cooperative Employee Ownership**

These publications are available for a fee of \$15 in hard copy or they can be downloaded from the foundation web site. The toolbox publications are intended to serve as an introductory

manual for the development of a cooperative. They cover the full range of issues – legal, financial and membership – which should be addressed in the creation of the firm. These materials work best with an educated reader. The housing co-op materials assume some knowledge of real estate finance.

**Seeds for Change** (<http://www.seedsforchange.org.uk/resources>) is a set of resources on consensus based decision making and facilitation; effective meeting facilitation; development of worker co-ops; and direct action campaigns.

**Toolbox for Education and Social Change (TESA)** (<http://toolboxfored.org/>) facilitates workshops and trainings for cooperatives and other grassroots groups. They are developers of curriculum for cooperatives and have developed two tools:

- **Co-opoly.** This is an educational scenario board game that is enjoyable for all groups from those new to co-ops to members of co-ops. It can be purchased from TESA by itself or as part of training on cooperatives. The game works well for newcomers to co-ops or for those with more advanced knowledge of co-ops.
- **Cultivate.coop** (<http://cultivate.coop/wiki/academy>) is an online hub that serves the cooperative community. The site has 3 components: articles about cooperatives for readers ranging from newcomers to those with advanced knowledge of cooperatives; educational resources for educators and for self directed learners; and a community portal. Once you register, you can contribute materials to the site and also edit information where you encounter errors. It is modeled on Wikipedia. Access is free and open to all. The [Self Assessment Tool for Start Up Cooperatives](#) which is discussed in the report can be accessed from this site.

**United Diversity** (<http://uniteddiversity.coop/category/cooperative/>) is a British co-op whose mission is to promote community empowerment and cooperatives. They have a page devoted to co-op related postings. “Doing it without leaders” was cited in the survey as a useful resource about community based organizations creating co-ops.

**University of Wisconsin, Center for Cooperatives** (<http://www.uwcc.wisc.edu/default.aspx>) has a wide ranging and in-depth set of resources for cooperative education. Materials are available on the cooperatives, internal governance and operations, co-op development, research reports and articles, and case studies. The survey explicitly referenced the case study publications by two center staff members, Greg Lawless and Anne Reynolds. They are:

- [Keys to Success for Food Co-op Start Ups in Rural Areas: Four Case Studies](#)  
A study of four grocery cooperatives, located in Minnesota and Wisconsin.  
Research Report 208.  
[Worker Cooperatives: Case Studies, Key Criteria & Best Practices.](#)

The materials on this site serve a variety of audiences from general interest to agriculture to educators and researchers. The survey identified the following as especially good resources:

- [Cooperative Equity and Ownership: An Introduction](#) by Margaret Lund
- [A Multi-Stakeholder Cooperatives Manual](#) by Margaret Lund.

**US Federation of Worker Cooperatives** (<http://www.usworker.coop/>) has an extensive set of resources in a digital library about worker cooperatives. Some of their resources are restricted to members.

### **U.S. Department of Agriculture, Rural Development**

(<http://www.rurdev.usda.gov/rbs/pub/cooprpts.htm>) includes an extensive array of publications and research reports about cooperatives in rural America. Historically, the emphasis has been on agricultural cooperatives. The following publications were cited as especially useful in the study.

- IR 11 Cooperatives: What they are and the roles of members, directors, managers, and employees- Instructors, Youth, General, Agriculture
- CIR 5 Cooperatives in Agribusiness- Youth, Agriculture, General
- CIR 7 Steps to Starting a Co-op- public, community development, entrepreneurs)
- CIR 45 Series- Agriculture, Instructors, Youth, General
- CIR 55 co-ops 101- agriculture, youth, general, instructors
- USDA Equity redemption Guide-coop boards
- USDA Reports- General Agriculture
- SR 58 Feasibility Study Guide- agriculture, general
- Rural Coops Magazine-Community

**Valley Alliance of Worker Cooperatives** (<http://valleyworker.org/>) is based in Western Massachusetts. It is a membership organization of 11 worker cooperative located in Connecticut, Massachusetts and Vermont. The organization provides technical and organizational assistance to members. They also provide marketing support and financial assistance to members. One of their objectives is to educate the public about how cooperatives can create jobs in the community. They are dedicating to promoting the growth of a cooperative economy in western MA and southern VT. Their website includes educational information for their members and for others interested in developing new co-ops. This website includes access to Erbin Crowell's master's paper which was cited as a useful resource in the survey for those who are interested in promoting co-op led development.

### **Cooperative Education Trainings**

**Cooperative Works!** (<http://www.cooperationworks.coop/>) is a national organization of cooperative development centers and practitioners engaged in co-op development. The association sponsors a three part professional development training twice yearly at the University of Wisconsin, Madison in the spring and fall. The CW! Training provides participants with training materials that can be used in their work developing cooperatives. The target audience is CW! members, staff, and independent development consultants.

**Green Worker Coop, Coop Academy Curriculum** – prepares coop entrepreneurs to start up new worker cooperative businesses (<http://www.greenworker.coop> ) Trainings occur over a 24 week period for prospective entrepreneurs with an interest in businesses that will be worker owned and green. Participants work as a team on the startup of a new green worker co-op. Preference is given to groups from the South Bronx, New York.

## Appendix E: Responses to Questions 19 & 20

What cooperative education materials need to be / updated?	What new cooperative education materials need / to be developed? Why?
<b>Many of the USDA</b> cooperative program materials. Even if the information is still accurate, it needs to be reviewed so the most recent review date is at least in this decade.	<b>Basic, web-based introductory program</b> for ag co-op employees -- "Co-ops 101" for employees.
<b>All</b> for clarity.	Over all to match what is being presented World Wide.
This is a very broad ranging question... There are more materials being used than those listed earlier...so it is almost impossible to answer this question.	<b>Governance. Finance. Law.</b>
<b>USDA materials</b>	<b>Online simulation games</b>
More business research needed. Hence, more robust education material based on research in <b>various disciplines</b> .	I guess I answered this question in the previous window. Maybe both questions can be on the same screen? May not be an option.
Not being familiar with formal cooperative education per se, my response is limited. Much of the <b>USDA material</b> I'm familiar with is too broadly targeted and too watered down in general, but still a good starting point for many of the totally uneducated.	Materials looking at <b>hybrid legal options</b> : Cooperatives operating under various legal frameworks like LLC, L3C, non-profit status, and combining for and non-profit aspects. Most Cooperative material seems to be developed by purists, while the interested parties are pragmatic with diverse interests/concerns.
We still need a good <b>collegiate coop textbook for ag coops</b>	
See: / <a href="http://development.abolishhumanrentals.org/">http://development.abolishhumanrentals.org/</a> / This advocates updating the coop principles, worker coop financial structure, and coop accounting among other things.	
The <b>Cropp and Zeuli</b> book, if updated and expanded (including minicases on worker coops), could be an excellent standard textbook.	<b>Current case studies</b> on worker coops, covering various issues (startup, sustainability, governance, financing, etc.). To guide more such startups and prevent wrong turns.

<p>The <b>USDA materials - badly out of date</b>. Also, materials for co-op governance is mainly from the perspective of policy governance (an adaptation of the John Carver model). Co-op boards and members need to know there are other alternatives. The same goes for Roberts Rules of Order - there are other alternatives in how meetings are facilitated.</p>	<p>When structuring a co-op, how do you take into <b>account varying time horizons</b> - should founders have access to more equity as they depart to compensate them for sweat equity as compared to members who join the co-op after the business is well established. / / Discussion on member economic participation - and how to do this in low income communities or among low resource potential members.</p>
<p><b>most</b></p>	<p><b>interactive online materials</b> about the co-op business model - in general, history, types of co-ops</p>
<p>As an online hub for cooperators, Cultivate.Coop needs to be continually updated with new and additional information.</p>	<p>At TESA, we believe that more high-quality resources need to be developed that are free and accessible to the public. Right now, there are co-op education materials spread out around the internet, but some are of dubious quality, and many are difficult to find by those not already knowledgeable about co-ops. We believe people need a trusted, reliable online space they can come to in order to access such materials, as this will allow more people to learn about and interact with the cooperative movement, which will ultimately serve to strengthen the movement. We've been trying to build Cultivate.Coop up to serve as this, but it will take more work on our parts and more collaboration and partnerships with others involved in cooperatives.</p>
<p>As an online hub for cooperators, Cultivate.Coop needs to be continually updated with new and additional information. The materials that Equal Exchange started to put together for business schools needs to be updated and expanded. The Tech Freelancers Guide to Starting a Worker Co-op should be updated.</p>	<p>At TESA, we believe that more high-quality resources need to be developed that are free and accessible to the public. Right now, there are co-op education materials spread out around the internet, but some are of dubious quality, and many are difficult to find by those not already knowledgeable about co-ops. We believe people need a trusted, reliable online space they can come to in order to access such materials, as this will allow more people to learn about and interact with the cooperative movement, which will ultimately serve to strengthen the movement. We've been trying to build Cultivate.Coop up to serve as this, but it will take more work on our parts and more collaboration and partnerships with others involved in cooperatives.</p>

	Need more applied materials -- case studies, story embedded narratives, developed from strong theoretical background, but with first hand examples. It is not enough to tell the story, need a framework that explains what different theories would suggest, why it matters, etc. / / Our educational programs for cooperative leaders ( in contrast to classes for graduate students) are almost entirely first hand narratives, specific examples of a given challenge, with possible solutions.
<b>Conflict resolution</b> in cooperatives, especially worker cooperatives, is an important issue. I would like to see more information available about the book _Co-operative Workplace Dispute Resolution: Organizational Structure, Ownership, and Ideology_ by Elizabeth Hoffmann / <a href="http://www.gowerpublishing.com/isbn/9781409429241">http://www.gowerpublishing.com/isbn/9781409429241</a> / /	<b>More information about conflict and dispute resolution</b> in co-operatives needs to be available. This includes discussions about how co-operatives, especially worker co-operatives, struggle to reach goals of equality and workplace justice. An excellent text for all these issues is Elizabeth Hoffmann's book _Co-operative Workplace Dispute Resolution: Organizational Structure, Ownership, and Ideology_ / <a href="http://www.gowerpublishing.com/isbn/9781409429241">http://www.gowerpublishing.com/isbn/9781409429241</a> /
answered this already..?	Materials that are learned by <b>practicing using real life</b> : people are really busy, it's hard to take time away from work to learn therefore methodologies that teach while working are most helpful / /
<b>USDA / All</b> of it needs to stay current	<b>Comprehensive database and retrieval system</b> / Daily or weekly "clippings" service to scan the latest co-op news from around the world. / Data driven research so we can prove co-ops are the best business model on earth :) in areas like impact on communities, employee happiness and satisfaction
I haven't started teaching my class or selecting materials, so am not really able to answer these questions well.	
	More materials that address the fact that <b>co-ops are PEOPLE centered</b> , and therefore need ongoing education, training, and group process that recognizes how hard it is for people to work together democratically. This ranges from conflict resolution, to collective or non-hierarchical management, gender and racial diversity, etc. So much co-op education seems to overlook this fact.
Housing, workers, start-up food co-ops	Cooperatives as <b>model for sustainable economics</b> . All levels.

I don't I have enough knowledge to answer this. I would say that I am not particularly impressed by what I've seen from the <b>SBA and USDA</b> .	There needs to be an emphasis on a <b>model of decision making</b> that goes beyond consensus.
To update our materials and workshops in <b>Spanish language</b> to support of new participants that require second language support.	We have incorporated <b>Anti-Oppression training</b> , By-laws and intensive marketing strategies development.
	<b>Community development</b> through cooperative development--as an alternative to government programs
<b>The Worker Coop Toolbox.</b>	<b>Accessible/culturally relevant Spanish Language</b> materials in a popular education format. Immigrant-led cooperatives are a growing sector of the cooperative movement. As a result, there is growing demand for more materials that resonate with this sector of the population.
<b>Much of the USDA</b> information although this is being somewhat addressed through the cooperatives community of practice on eXtension, the Center for Cooperative Growth at CHS and other efforts	Information on using the information generated by <b>cooperative accounting software systems</b> including the creation of dashboards, budgets, inventory control and other specific financial parameters
<b>Worker Cooperative toolbox</b> needs to be updated. The immigrant cooperative toolbox needs to be reviewed for cultural appropriateness, offensive imagery and graphic design.	
	best undergraduate textbook is out of date - material acceptable and well organized, but needs <b>modernization</b>
do not think update would be helpful	Do not need educational materials we need people putting in the effort to get cooperatives off the ground. Writing <b>Feasibility plans, leading groups and the like. We have enough educational materials.</b> We need people doing the work of starting worker cooperatives.



Any <b>history section</b> that refers to Rochdale as the first cooperative. /	
It would probably be helpful if the sources cited earlier in the survey were available as a single "suite" of "essential co-op education materials" and placed on ACE, Community-Wealth.org, and similar websites.	See earlier answer: clearly a need for more business development materials geared toward <b>specific sectors and more materials with respect to low-income populations</b> (i.e., using cooperatives as a community economic development tool)
"How to Start a Food Co-op" <b>CGN manual</b>	Promotional/advocacy materials for community leaders who are not familiar with cooperatives
<b>Toolboxes developed by NCDF</b> now owned by NCGA, distributed by CGN	Four Pillars of Cooperative Governance by CDS Consulting Co-op
	I'd like to see some good basic <b>interactive curriculum on learning the 7 cooperative principles</b> . Activities that help people understand how the principles apply in practice, where some of the tensions and practical applications lie in the day to day life of a coop.
The Sustainable Economies Law Center uses materials created and periodically updated by SELC, the Green Collar Communities Clinic, and volunteer law students from UC Berkeley's Boalt School of Law. We do not rely on other cooperative education materials.	An <b>integrated cooperative curriculum at community colleges and universities</b> needs to be developed. Mainstreaming the concept of cooperative ownership is vital to building regional and national cooperative economies. The more robust the cooperative sectors are, the more cooperative support services and education will be required. SELC, GC3, and Project Equity in Oakland and Berkeley are working to build one such cooperative curriculum at community colleges in the San Francisco bay area.
<b>Education and Pedagogical Techniques for Teaching about Democratic Workplaces</b> - those in existence are not participatory or engaging enough.	1. Using Democratic and Participatory Methods in Cooperative Ed (Lacking) / 2. Bringing Cooperative Ed to incarcerated or formerly incarcerated populations (an important population that is very interested in coops) / 3. Developing Urban worker co-ops (these are exploding) / 4. Co-op ed in middle schools and high schools (kids shouldn't learn what a co-op is for the first time in college - if they are lucky, that is)
	<b>Materials for credit unions</b> to help people from staff to executive understand the credit union movement in the context of co-operatives.

	<p>I'm not technically a coop educator. I work for Equal Exchange and we do a lot of trainings on fair trade and what it means to be in a farmer coop, what it means that we are a worker coop, and what it means for food coops who sell our products. / / I don't use any of the materials listed here, nor do I think any would ever be appropriate for my job. We have used coopoly as a coop game for fun at our parties, and we have internal coop trainings for staff that really just cover the basics. / / Not sure any of my responses here are helpful for this survey, but here is the info anyway!</p>
<p>*Gordon Nembhard materials on African American coops - new book coming out in 2014 and we need a non-academic version. /          *Gordon Nembhard materials on measuring impact of cooperatives - being updated on credit unions but needs to be broader and more documents that update what we are learning about measurement, and new or revised indicators. / *Co-op readers and manuals need to include writings by people of color and case studies of people of color and low income co-ops.</p>	<p>*Need materials for <b>state and local legislators about benefits of coops</b>, financing of coops. Factsheets, tables and graphs that show them quickly and effectively what we know about the benefits, quick guide to financing and workshops for engaging them. / *Need more <b>fun/game educational tools</b> that not only teach about cooperation but more about the co-op business model and cooperative economic structure - games and role-plays, video games, etc., specifically about how to operate a coop business from start up to expansion. / *Need more <b>videos</b> with people of color featured and coops of color featured. / *Need <b>comic books</b> about coops and cooperation.</p>
<p>Materials need updating on a regular basis, even more general ones.</p>	<p>We need more <b>online interactive programs, question/answer materials, podcasts, and videos</b>. More <b>publications</b> on cooperative law, worker cooperatives, food cooperatives, case studies of successful and unsuccessful startups (all sectors).</p>
<p><b>USDA</b></p>	
	<p><b>videos, or short educational pieces</b> that could be used on websites etc.</p>
<p><b>boards, managing employees, legal cases, quality speakers of non-academia, board assessment</b></p>	<p>take a look at a lot of the old material and put a new face on it that is more on target to today's young people entering agricultural settings and repackage it shorter and more to the point</p>

	Materials focused on <b>group/zero-equity housing cooperatives</b> in the United States, materials focusing on housing cooperatives in the US generally, materials focusing on the cooperative movement with a cross-sectorial analysis (specifically focused on youth, in order to encourage a 'career in cooperatives'), more video resources that are relevant and easily accessible (free).
<b>History of cooperatives</b> to include cooperative efforts of different races and classes	<b>Cooperative Finance, Cooperatives and Community Economic Development</b>
	Food coop resource materials for low-income communities
	I probably haven't seen enough on how to actually go through the real difficult process of cooperative decision-making, etc. Also, how to start/finance a coop when the potential worker-owners are predominately poor!
The few that are readily available are terribly outdated. Most of our material is printed in house to keep it accurate and up to date.	<b>Items for Facebook and You Tube</b>
More materials need to be released on training cooperative developers. / <b>All USDA education materials.</b>	<b>Manual for trainers and participant manual</b> for use in teaching new professionals to be cooperative developers. There could be two stages to this: very basic for use internationally; more advanced for CW! type participants. / Easy to use template for setting up cooperative books (financial recording and reporting).
	The new generation of cooperative member/owners need a fresh perspective on this business model.
	multi stakeholder,

<p>Frank Adams book</p>	<p>I teach Co-op Academy and am developing a popular education based curriculum for co-op business startup and operations. I decided to develop new materials because other materials do not do well enough at breaking down complex topics into manageable chunks. They either gloss over complicated stuff or present it in a way that's confusing and inaccessible. My curriculum focuses mainly on hard business skills: finances, marketing, sales, etc. Other materials are more readily available on topics of workplace democracy and group decision making, and I use those. Other groups are also teaching co-op academy, and I would like to compare curricula with them so that we can all improve and share best practices, but not necessarily standardize curricula. <a href="http://cultivate.coop/wiki/Academy">http://cultivate.coop/wiki/Academy</a></p>
<p>We are working on updating the <b>worker coop toolbox</b>, which needs it; in-depth case studies are always useful and hard to keep up-to-date; Governance publications in general I think should be more informed by organizational development research</p>	<p>I checked almost all the boxes because I think we do not have <b>sufficient in-depth practical publications</b>. In the worker coop sector, for example, we need more materials that help with business planning, financial modeling, understanding internal capital accounts and the implications of different financial decisions. Governance materials for coops in general are pretty basic and could be much more sophisticated -- Nonprofit Quarterly for example, always has good materials about nonprofit governance that goes beyond the basic "roles and responsibilities" but we have nothing similar for coops. We could all use more info on the communication skills and systems necessary to work in a member-governed environment; just basic information about how different state statutes work would be really useful and should be widely available, but it is not. Academic textbooks costing \$100+ might be useful in academic settings but do not do much for the movement. The best materials need to be deep, yet accessible and easy to read and those are hard to find.</p>

	<p>Materials for how to start a cooperative. I found the best way to learn about cooperatives is to connect with people directly involved with cooperatives. Not everyone has the opportunity to visit many cooperatives and cooperatives may not be able to accommodate constant visitors, so I see case studies as a good alternative. I think that case studies can provide students and people wanting to learn about cooperatives with an accurate account of a day in the life of a cooperative. Case studies coupled with resources to be used to analyze and discuss different co-ops would be very beneficial. I also feel there could be more resources focusing on worker motivation/ incentive in a worker owned business vs traditional business. There are behavioral science studies that state how autonomy in the workplace, task diversification, ownership, and other values inherent to a cooperative, create happier and therefore more productive resources; however, there are few resources that directly incorporate cooperatives into the discussion.</p>
<b>Spanish Co-op manual. Most of Latino community have no education in cooperatives.</b>	Spanish Co-op manuals.
	Financial Literacy - None really exist for worker coops / How to convert your company to a worker coop - conflicting legal advice

Anything touching on <b>choice of business models</b> since some states now have new business models, more about recent developments in co-operative economics and co-op-government collaborations worldwide.	We need <b>material that is intelligible and appealing to youth</b> , because youth need to identify early on that co-operatives are structurally, functionally, and practically an alternative to "business as usual" and all of its associated risks and inequalities. Youth need to start envisioning business opportunities in the context of community empowerment and cooperation from an early age. We also need more resources around developing co-operatives in URBAN contexts in the United States. Perhaps we need new materials that are targeted expressly towards urban entrepreneur/micro/start-up communities to explain how and why co-ops are an important choice for the ethical entrepreneur. We also need attractive, easy-to-digest materials promoting the co-op advantage especially in the "broader context" of social movements like sustainability, localized economies, alternative economics, etc. The co-op movement is situated within these broader and burgeoning movements for social, economic and environmental justice, and the only way the co-op movement will succeed is if it connects itself with these movements and promotes itself as a more holistic alternative. This is how new, young, and sustained interest in co-ops will be achieved domestically.
Specific information on <b>managing a cooperative, current issues faced by the board of directors</b> , mechanics of distributing returns, equity management and balance sheet management, risk management	The list is hard to define, but in general it would relate to <b>specific decisions and specific applications</b> of the cooperative business model. An example might be use of preferred stock, use of non-qualified stock, member communication strategies for large cooperatives, or specific performance metrics for individual cooperative sectors and business units
Link between <b>finance and governance quality / Research on human resources in cooperatives</b> / Theory of the evolution of human and financial capital as cooperatives develop	
	<b>Case studies</b> are helpful for technical assistance - the specifics help translate principles to actual setting. / / Workbook templates for improving financial understanding of start-up and equity management / /

Don't know. I'm working with entrepreneurs who are drawn to the co-op model. They're interested in forming a business, and not interested in academic presentations. Presentations are usually 1 on 1 or with a small steering group. I'm not aware of resources that are particularly appropriate for that task. The <b>USDA materials</b> that I've seen are extremely dated in their appearance, but the content might be usable.	I'd be curious if there might be a potential joint project for <b>CW and ACE in developing a "common curriculum"</b> that is NOT academic in nature, but geared to working with cooperative entrepreneurs who are taking on the task of forming a cooperative, and who don't necessarily have a high tolerance for seat time.
A variety of <b>USDA publications</b> on Co-ops	<b>Financing of Cooperatives</b> -- much of existing material is dated and not reflective of current options for co-op like organizations
<b>Cooperative governance in the 21st century</b> , board and management responsibilities and relationships, strategic planning process for starting a cooperative	<b>Cooperative textbook</b> (history, starting a cooperative, finance, and governance) <b>for undergraduate students</b> . A common baseline text would be useful reading material for the varied classes on (agricultural) cooperatives
<b>Materials for youth</b> definitely need to be updated as has been done by Ontario Cooperatives Council. More is needed on co-op finances and will need to be done by sector. <b>Bylaws and governance</b> also need to be done as well as outlining strategies for states that are not flexible enough for the co-op model and emphasize that style is not as important as content.	10 to 15 minute shorts for <b>website online training</b> that are self-study and self-paced -- about 50 of them and which will work for this younger generation and the way they use the internet utilizing vignettes There is no cookie cutter with co-ops but will lose the cultural richness if we use a cookie cutter approach. (We can't use the Harvard Business approach of maximizing shareholder wealth instead we need to emphasize the triple bottom line) We need an overarching accreditation body for training of boards of directors. There are some certificate programs but no one is talking to each other about a board certified program recognized by all sectors.

<p>Stuff related to <b>cooperative financing/resource management</b> seems always in need of updating. Also, issues related to <b>ESOPs and workers cooperatives</b>. Feels like we are overdue for a good edited volume in this area of the caliber of Worker Cooperatives in America. 1984 R. Jackall and H. Levin (eds). Berkeley: University of California Press. Also, good, easy to digest materials regarding conflict management and sustainability.</p>	<p>Lately I have been lamenting the <b>lack of legal scholarship</b> focused on issues related to cooperative incorporation/governance. We seem to have very little empirical data that provides accurate mapping and/or subnational comparisons of state law which effect different types of cooperatives, particularly in <b>light of new legislation on LLCs and B-corp</b>. Relatedly, we don't seem to have a lot of theoretical material in this area though it seems to be ripe with possibilities, particularly related to how best to support cooperatives legislatively moving into the future. I would love to see more research in this area...would actually love to collaborate with others on a bigger project of this nature. Also, I would love to see more (any!) work focused on <b>work of cooperative in minority communities</b> (both historically and contemporary landscape. I have wanted to get together an edited volume on this subject and remember talking to Jessica Nembhard Gordon about this when she came out here in 2010!</p>
	<p><b>Local food production and processing, food aggregation, and food cooperatives case studies</b>, both successful and unsuccessful - lessons learned. There is interest and people want to know how to start; and also what to do when they see problems, where to turn when they realize things are not going well, often there are personality or other management issues. We have too many cooperative start-ups that are failing even though they have a good business purpose and a good market. I'd like to see some resources dedicated to developing community around these small local foods start-ups that will help them succeed. One potential way is through <b>eXtension learning networks</b>. This is not being done right now, but it could be, if leaders/experienced persons were able to put the time into this.</p>



<p>The <b>Nadeau book, Cooperation Works!</b> was very effective as an introductory text but it is very out of date as is the <b>Zeuli and Cropp text</b>.</p>	<p>There is a need to create more <b>web based resources</b> that are in units that appeal to a <b>younger generation</b> who are accustomed to web based sources of information. These need to incorporate <b>multimedia such as talks; videos of co-ops in action; interviews with co-op members, etc.</b> / / We need to develop materials that are more in depth such as the Gary Hansen and Frank Adams book, Putting Democracy to Work on worker co-op development. The toolboxes are at the level of detail of an appetizer. The chartering members need materials that take them further and allow them to be effective consumers of technical assistance. Too often groups lose momentum because they have difficulty in obtaining appropriate legal counsel.</p>
<p>Honestly, the education we do is either presentations about the role we play in co-op movement or sitting with particular potential applicants or borrowers and helping them work through gaps in their potential applications. We don't rely on outside materials, for better or worse.</p>	

	<p>Co-op led development has played a role in supporting the development and success of several worker co-ops in the past three years. Why these are successful, how to inform co-ops that they can successfully direct and fund their own development, support, education and marketing is powerful material that would assist in strengthening our movement, our co-ops and the knowledge of our co-operative membership. Another reason this needs focus is that non-profit development models have limitations that have only recently come to levels of dialog accessible to many if not most worker co-ops through the annual Advancing the Development of Worker Co-operatives conferences. Worker co-ops run their own businesses, why can't they run their own development and support? / Also, our movement would strengthen if a higher profile and more resources were dedicated to the role of member run support organizations like our US Federation of Worker Co-ops and the power interco-operation in general. More case studies, organizing and promotion of what can be achieved through co-ops working together in and across sectors would be useful for any co-op or organization that supports them to prioritize.</p>
	<p><b>More videos</b> -- found a bunch of good ones, but a lot of people like to learn this way. More business school case studies, especially focused on succession strategy and green/sustainable business.</p>
I honestly don't know	<p><b>Multi-stakeholder coops</b> are so new there aren't many materials available yet.</p>
<p>I think short (5-10 min) educational videos on general coop topics for groups to watch themselves when a coop dev professional is unavailable or to use with a coop dev prof answering questions. / / Materials for new local food system coops of diversified small farms. Ag coop materials are so focused on Midwest soy/corn.</p>	<p>More multi-stakeholder, insurance, land-owning, certification, coop materials.</p>
	<p>Materials that are access point for the general public that provide options for further inquiry and research into specific sectors. + More general public resources that can help folks understand how the model applies to their lives, problems, ideas, etc.</p>

Awaiting the new film on food co-ops. / / Need new historical overview DVDs of international successes: Mondragon, Emilia-Parma, etc.	Some PowerPoint presentations?
	Application and collaboration of the principles
	Materials about conflict resolution, doing anti-oppression work, how to conscientize people about coops, solidarity economy, etc.
	Materials that recapture the history, ideals and potential of cross-sector collaboration. Because the sector divisions are hampering a full understanding of the movement and its potential.
	Need more games like Co-opoly except that you can do in half an hour and with big groups. In Spanish por favor! Ice breaking games that highlight and reinforce coop values and principles would also be great. / / Also more materials for and about immigrant coops - a "Beyond the Bottom Line" with immigrant coops would be great!
anything having to do with multi-stakeholder cooperatives.	Steering committee functioning
Most of the materials that are developed for non-academic audiences need to be updated.	Practical start-up manuals; We need to develop non-workbook types of materials for use with immigrant and under-served communities.
	More colleges need to teach the cooperative business model.
	I am not aware of any compendium of state incorporation laws that can be used by cooperatives. Such a compendium, annotated with respect to nuances of potential usability, would be extremely useful.
	Introduction to co-ops for community colleges
The USDA materials are a huge resource and need to be selectively updated.	PC-based analytic tools for learning financial concepts and understanding financial reports. They should be targeted to groups that are starting cooperatives and to members/perspective board members/board members. / / More teaching case studies are needed, especially on new cooperatives.
	Many of the coop materials are aimed at a specific industry such as agriculture or electric or credit unions. There are not very good materials giving an overview of the similarities and differences in legal and tax treatment among the various coop sectors.

<p>Youth as legal cooperative member owners. / Clear and thorough resources on patronage. / State-specific and accessible resources.</p>	<p>More resources in Spanish and culturally appropriate for immigrant communities and bi-lingual / bi-cultural / multi-cultural co-ops. / More interactive activities, videos, popular education resources.</p>
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## Appendix F: Interview Results

How do we assess the abilities of these organizations to produce the materials?	How do we assess that the materials are being produced by the best available source?	Other: Lack of resources/Resources needed
<ul style="list-style-type: none"> <li>○ Governance: Structure talk with Leslie Kauffman at the Kansas State Council</li> <li>○ Patronage: talk with Greg McKee or Brent Hueth               <ul style="list-style-type: none"> <li>○ CW training</li> <li>○ Mondragon</li> </ul> </li> <li>○ La Montanita (Being able to recognize the best source of the materials)</li> <li>○ Student workers found information that already existed on the internet</li> </ul>	<ul style="list-style-type: none"> <li>○ Have put together our own resources at: <a href="http://accc.k-state.edu/">http://accc.k-state.edu/</a></li> <li>○ Other good, quick access sites are the University of Wisconsin's center for cooperatives and the state councils</li> <li>○ Finance/Tax: CoBank or a local auditing firm in Kansas</li> </ul>	<ul style="list-style-type: none"> <li>○ Time for the delivery</li> <li>○ Funding to hire someone to do the work</li> <li>○ Availability for curriculum (Curriculum is not available)</li> <li>○ not enough time to look for or create (curriculum)               <ul style="list-style-type: none"> <li>○ Information needs to be updated</li> </ul> </li> <li>○ Training materials must be more interactive and/or modern               <ul style="list-style-type: none"> <li>○ Creating more online or simulation games</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>○ Translating information so that 'everyman' or the common man can understand it               <ul style="list-style-type: none"> <li>○ Whole Brain Training</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Creative and innovative (People)</li> <li>○ "I create what I use." Created with resources LECD knows of</li> </ul>	<ul style="list-style-type: none"> <li>○ Need curriculum that has cultural competency</li> <li>○ Accessible format (The materials must be in accessible format)</li> <li>○ training and teaching about the practice of co-ops (How you train and teach about the practice of co-ops is lacking)</li> <li>○ basic information on the practical application of the model</li> <li>○ Most materials are linear information, they require a level of reading and certain education level</li> <li>○ The materials are intended for student and faculty</li> <li>○ Uneducated learners shut down and stop learning</li> <li>○ Use materials created in Argentina, Chile, Spain and Brazil?</li> </ul>

<ul style="list-style-type: none"> <li>○ USDA</li> <li>○ Other co-op development centers <ul style="list-style-type: none"> <li>○ The Ag MRC website: <a href="http://agmrc.org/directories_state_resources/agmrc_directories/iowa-state-resources/">http://agmrc.org/directories_state_resources/agmrc_directories/iowa-state-resources/</a></li> <li>○ Quinten Burdick Center</li> <li>○</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Look for <u>actual experience</u> (trainers with co-ops experiences)</li> </ul>	<ul style="list-style-type: none"> <li>○ Funding (Need funding)</li> <li>○ Need experts in housing co-op to help educate people <ul style="list-style-type: none"> <li>○ Need a core curriculum</li> <li>○ Need webinars</li> </ul> </li> <li>○ With looking at how to develop housing co-ops, how the development pertains to the state is a little different</li> <li>○ Materials and resources could be collected in one place (to improve access and quality of cooperative educational materials)</li> </ul>
<ul style="list-style-type: none"> <li>○ Toolbox kit produced by Northcountry</li> <li>○ <i>Make no small Plans</i> but Lee Eggerstrom</li> <li>○ David Cobia's book was a good education book</li> <li>○ Canada has created great training resources – they are simple and interesting</li> </ul>	<ul style="list-style-type: none"> <li>○ Canada has created great training resources – they are simple and interesting</li> </ul>	<ul style="list-style-type: none"> <li>○ There needs to be advanced work on what is a co-op and how it is an alternative <ul style="list-style-type: none"> <li>○ We need to create a pull force – the front end demand is not there</li> <li>○ Materials can't be theological or esoteric – they need to be practical</li> <li>○ There need to be more general books that describe how co-ops can affect how you live</li> <li>○ Co-ops have to prove to be a stimulus but sturdy organization</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>○ Develops most curriculum himself</li> <li>○ The caliber often depends on the sector: Credit union have a high quality curriculum; NRECA, not familiar but know they have created curriculum</li> <li>○ Uses USDA materials, but they do not offer <i>training</i> materials, they are not “course ready” and they need to be course ready!</li> </ul>	<ul style="list-style-type: none"> <li>○ Have the opportunity to come together as trainers – such as ACE, but that doesn't capture everyone</li> <li>○ Use referrals because can't find a list of all training that is co-op centric <ul style="list-style-type: none"> <li>○ New materials takes a time consuming search process, someone should be tasked with keeping resources up to date</li> <li>○ There is no a central location to find materials <ul style="list-style-type: none"> <li>○ Creating curriculum takes a lot of time</li> </ul> </li> <li>○ Have a centralized location for materials that lists the trainer and has trusted resources on subject matter</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Look for people who have experience and expertise in that subject matter</li> <li>○ In addition, they should have curriculum development expertise</li> <li>○ Curriculum should be tested, applicable and interactive.</li> </ul>	
<ul style="list-style-type: none"> <li>○ Co-opoly, Cultivate, free resources on website, etc.</li> </ul>	<ul style="list-style-type: none"> <li>○ Definitely we use Co-opoly</li> <li>○ Activities, zines, videos</li> <li>○ Experience in both formal and informal settings</li> <li>○ experience in democratic and popular education</li> <li>○ Experience in organizing and working within a collective</li> <li>○ People who have cooperative skills within co-ops (consensus building, running democratic meetings, etc.) <ul style="list-style-type: none"> <li>○ products get reviewed in classrooms, practitioners in the field, focus groups we bring together; for smaller, free resources</li> </ul> </li> <li>○ Very interested in primary sources (first-hand accounts, stories from co-ops)</li> </ul>	<ul style="list-style-type: none"> <li>○ There needs to be a greater presence in undergraduate education</li> <li>○ no presence in formal settings (Schools)</li> <li>○ Not many primary source documents</li> <li>○ Need more longitudinal studies about co-ops and their impact; hard empirical research; statistical analyses</li> <li>○ More professional videos that can be used in a variety of settings about specific topics related to co-ops;</li> <li>○ No publication that's a compilation of resources, studies, data, activities of co-op education <ul style="list-style-type: none"> <li>○ Lack of academic studies</li> </ul> </li> <li>○ limited by not having access to academic databases, which might have more information <ul style="list-style-type: none"> <li>○ More multimedia is needed</li> </ul> </li> <li>○ More needs to be added about resources that are available, about work that's being done</li> </ul>
	<ul style="list-style-type: none"> <li>○ point people to the Food Co-op Initiative</li> <li>○ people with expertise in the particular area</li> <li>○ people who are good at curriculum development</li> <li>○ people should be well grounded in the info and in how to teach</li> </ul>	<ul style="list-style-type: none"> <li>○ we don't know what platform to adopt for webinars <ul style="list-style-type: none"> <li>○ we aren't technologically savvy</li> </ul> </li> <li>○ an easy way for people to access distance learning <ul style="list-style-type: none"> <li>○ Something that would work for rural areas</li> </ul> </li> <li>○ to get better at producing, editing, archiving, and referencing videos and sound clips</li> <li>○ Interested in creating materials for forming artist co-ops because there isn't much out there</li> </ul>

		<ul style="list-style-type: none"> <li>○ Expand Co-opoly by using other materials (like business planning, etc.) to make it more realistic? More fun, engaging, and practical resources</li> <li>○ Need resources that clearly explain the ramifications of different legal issues <ul style="list-style-type: none"> <li>○ Need more Spanish-language materials</li> </ul> </li> <li>○ Need materials that would work for immigrants and refugees (more image-based)</li> <li>○ Materials for people in rural or lower economic areas</li> <li>○ make book more applicable and accessible and useful to the co-op community, particularly in African American communities</li> <li>○ Doing a scan of what other organizations are doing or thinking about doing and work with them to bring it out to a larger audience</li> <li>○ Need people who can sift through all the info and present it in an interactive way (a decision tree, choose your own adventure, etc.)</li> </ul>
<ul style="list-style-type: none"> <li>○ Used a lot of materials that BCCO and Stacey Cordeiro have developed</li> <li>○ Used activities that Green Worker and CDI have developed for their academies</li> <li>○ Used some resources that DAWN and USFWC have developed</li> <li>○ Used a TESA resource on co-ops and nonprofits</li> <li>○ Used clips from Shift Change, as well as Co-opoly</li> <li>○ We've created some materials around youth and co-ops and some co-op 101 materials <ul style="list-style-type: none"> <li>○ Most of what we do is a collaboration with BCCO and CDI</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Real connection to the movement</li> <li>○ Some sort of accountability to the movement and co-ops</li> <li>○ Having co-op members on their decision-making bodies</li> </ul>	<ul style="list-style-type: none"> <li>○ More materials for youth</li> <li>○ More materials for people who speak languages other than English <ul style="list-style-type: none"> <li>○ specific materials about how co-ops function</li> <li>○ more participatory curricula around co-ops <ul style="list-style-type: none"> <li>○ multimedia materials for teaching</li> </ul> </li> <li>○ Hard to find some specifics around youth and business in general (co-ops in specific)</li> </ul> </li> <li>○ Missing short firsthand accounts of how things are dealt with in co-ops <ul style="list-style-type: none"> <li>○ videos explaining processes, of challenges and successes in functioning co-ops</li> </ul> </li> <li>○ People's reluctance to share publically the materials they've created</li> <li>○ Need a better directory, whether it's DAWN or Cultivate.Coop, of co-op materials, curricula</li> </ul>



<ul style="list-style-type: none"> <li>○ We Used Freire’s approach and popular education approaches</li> </ul>		
<ul style="list-style-type: none"> <li>○ We’ve really created our own materials</li> <li>○ the most significant external source of information is curriculum from a non-co-op source on sales, marketing, and finance</li> <li>○ We created curriculum for the co-op academy</li> <li>○ The following organizations are well qualified: Green Worker Cooperatives, Cooperation Texas, AORTA, DAWN, TESA, ACE, Worcester Roots, Center for Workplace Democracy</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ Involvement in the co-op world</li> <li>○ Have actual co-op experience</li> <li>○ Have business experience</li> <li>○ Democratic education is critical, but so is the traditional business experience</li> <li>○ To develop curricula we brought in people with an experience in a particular area and asked them to develop a lesson plan</li> </ul>	<ul style="list-style-type: none"> <li>○ We need greater capacity throughout the pipeline—our co-op academy (the big pipe)</li> <li>○ co-op versions of the traditional business fundamentals particularly around sales and marketing, distribution of patronage, accounting process for co-ops and how that works</li> <li>○ Lack of Spanish-language materials</li> <li>○ Not being able to find a good directory of materials</li> <li>○ Need interactive resources</li> <li>○ Need more language accessibility</li> <li>○ Need better database of resources, having an easy-to-use, easy-to-find directory</li> <li>○ Need a place that has everything you’d want to know about worker co-ops in one place</li> </ul>
<ul style="list-style-type: none"> <li>○ Used the Federation of Southern Cooperatives; their focus is more regional and rural</li> <li>○ The Southern Grassroots Economy Project</li> <li>○ A lot of what I’ve created are around Black co-ops</li> <li>○ Created presentations about credit unions</li> <li>○ Created courses on AFRICAN AMERICAN history and wealth inequality (how co-ops help stabilize incomes)</li> <li>○ Excellent research on co-ops in Canada</li> <li>○ Used materials about co-ops that I’ve gotten from USFWC</li> </ul>	<ul style="list-style-type: none"> <li>○ Someone with credentials in higher ed and with a track record of researching and writing about co-ops.</li> <li>○ For pop ed, we need people who are seriously doing really interactive work with co-ops</li> </ul>	<ul style="list-style-type: none"> <li>○ We need more materials that reflect African American thought, activities, and show African Americans in the co-op movements</li> <li>○ Popular education—materials that get the audience involved in contributing their own experience and knowledge</li> <li>○ Money—some materials people charge for or it costs money to download and distribute</li> <li>○ Many co-ops don’t have the funds to get these materials</li> <li>○ The groups I talk to feel like not seeing themselves in the materials makes it hard to be connected or interested in using the materials</li> <li>○ Not enough studies and focus on urban co-ops</li> <li>○ Not enough materials for elementary and middle school aged children</li> </ul>

<ul style="list-style-type: none"> <li>○ Used some materials from the Federation of Southern Co-ops</li> <li>○ Used some of the Federation of Southern Co-ops materials</li> </ul>		<ul style="list-style-type: none"> <li>○ Need to see a bunch of co-op organizations do national popular education activities (funding TV ads, get involved in 4H programming, school curricula)</li> <li>○ Cooperative Foundation should convene some kind of national group that could bring the major players together to have a dialogue about co-op education and what should be done to improve what's out there and access to it</li> </ul>
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### How do we assess that the materials are being produced by the best available source?

<p>Authority—best qualified to write curriculum; certify curriculum; resource people</p>	<ul style="list-style-type: none"> <li>Effectiveness of the materials for serving the intended audience</li> </ul> <p>Effective materials should be able to serve a potential group of cooperators as a roadmap or guide to the development process. The materials need to give people enough information to take meaningful steps and to alert them to issues that will require decision making on their part.</p>	<p>Efficient</p> <p>Efficiency criterion considers whether the materials are well suited based on issues of accessibility. i.e. cost, availability, and delivery format</p>	<p>Appropriate</p> <p>“appropriateness” of materials i.e., complexity of the writing; suitability for the educational level of the target audience; accessibility of the resource (still in print; cost, etc.) and whether the</p>
<p>NGiszpenc TESA &amp; AORTA, USFWC, NASCO, USDA, CDI, CW! FCI for food co-ops acc. To Noemi Democracy at Work Institute &amp; Worker Co-op Toolbox People with subject matter expertise and experience in curriculum development; her lawyer for legal questions; CW listserv; experts on sectors and put co-ops in touch with other co-ops. Team with expertise in particular area &amp; good at curriculum development – popular education techniques,</p>	<p>TESA according to Noemi has reviewed and improved curriculum of others All new curriculums should be pretested among people who will use the resources.</p>	<p>More tech based resources are needed to address the spread out territory that CDI serves. CDI lacks tech skills for offering online webinars and for developing videos and sound clips</p> <p>People who can sift through all the info and present it in an interactive way</p> <p>Cultivate.coop is a great aggregator but not possible to have everything in one location but needs funds to improve and marketing</p>	<p>Need more materials to serve artists co-ops; Spanish language; materials for immigrants and refugees; more multimedia materials; Coopoly needs to develop materials that would make it more realistic</p>

well grounded in the info & how to teach it			
<p>Jessica: Cooperation TX, GEO, Southern Grassroots Economy Project, U of WI Center for Cooperatives but website is not easy to navigate; NCBA used to have good resources but latest iteration of website is not helpful</p> <p>For higher ed, someone with credentials in higher ed and a track record of researching &amp; writing about co-ops; for any sector must have experience with co-ops Have experienced people mentor those who are novices</p> <p>For popular education, people who are seriously doing really interactive work with co-ops</p>	<p>Excellent Canadian research materials; USFWC for worker co-ops; Equal Exchange employee manual; Federation of Southern Co-operatives; &amp; some of her own materials using GEO articles</p> <p>Try out materials on small groups and get feedback to change and adapt them.</p> <p>Used a committee of people from BCCO, Worcester Roots and CDI to review the materials they used.</p> <p>Her published works go through editorial review but not her classes.</p>	<p>Cost of purchasing materials is barrier – many co-ops lack funds to get materials; people don't want to use materials that they can't see themselves in; not enough on urban co-ops nor materials for school aged children. More of this exists in Canada and Puerto Rico</p>	<p>her new book, Collective Voices and then the Federation of Southern Cooperatives &amp; Southern Grassroots Economy Project for African American communities; for curriculum Chris Clamp or Greg McKee; worker co-ops use USFWC, OH Employee Ownership Center;; for popular education Co-op TX, Federation of Southern Co-ops but dated and Co-op Grocers</p>
<p>Andrew: TESA, AORTA, Sustainable Economies Law Center, UK Co-op Enterprise Hub</p> <p>Calls Noemi with questions or another worker co-op</p> <p>Teaching qualifications should include formal &amp; informal settings; people with democratic &amp; popular education; experience</p>	<p>Gets products reviewed and uses focus groups and practitioners in the field</p>	<p>More multimedia materials needed – less text heavy; increased access to scholarly work so it is not siloed in higher education; more work done on cultivate.coop to add more resources about work being done</p>	<p>Co-opoly i.e. TESA's own materials</p>

organizing & working in a collective; skills in running democratic meetings and consensus building			
<p>Omar has his own materials; Urban Justice Center in NY, esp. Ted DeBarbieri but not always “user friendly”</p> <p>GWC, Cooperative TX, AORTA, DAWN, TESA, ACE, Worcester Roots, Center for Workplace Democracy</p>	Used a steering committee of GWC, TESA and Noemi from CDI to review the materials; evaluations of each session in co-op academy and of entire program; lesson plans provided to trainers and then ask that they make modifications	<p>Strategies needed to get the right people into the Co-op academy who are interested in starting a co-op and can link them to supports at end of the program.</p> <p>Language accessibility; better database of resources, easy to use, easy to find directory</p>	Need more Spanish language materials; more on popular education and co-ops. More interactive resources needed than PowerPoints; magazine articles esp. in Spanish
<p>Matt:</p> <p>materials from Boston Center for Community Ownership/Stacey Cordiero, Green Worker Cooperatives, DAWN and CDI; Shift Change &amp; Coopoly</p> <p>Relies on people who have dealt with a co-op issue before like CDI, BCCO and Co-op Fund of New England</p>		<p>People are reluctant to share what they have created. It would be great to have materials publically accessible; a better directory or co-op materials, curricula etc. by subject &amp; media</p>	Need materials for youth and people who do not speak English – materials about how co-ops function and participatory curriculum & multimedia materials
<p>Tom Decker</p> <p>Look for people who have experience &amp; expertise in subject matter &amp; curriculum development expertise; especially well qualified – St. Mary’s University, CU Development educators</p>	<p>Curriculum should be tested, applicable and interactive</p> <p>Need curriculum developed by people with a teaching background not just a technical expertise</p>	<p>No central location to find materials – need a group or association to maintain this; new materials take a time consuming search process – need someone tasked with keeping resources up to date. Vetting and review process once you have materials is</p>	

<p>program; certification programs (CW!)</p> <p>Experts: Anne Reynolds, Art Sherwood, Keith Taylor, Nancy Fuldry, Chris Clamp</p> <p>Legal question: Dave Swanson</p>		<p>needed perhaps by an academic or advisory group with experts from different sectors</p> <p>ACE could play this role.</p>	
<p>Lori Capouch</p> <p>Turns to NRECA internally; co-op members and CW members for questions</p> <p>Kim Coontz for day care co-op info</p> <p>Uses networks and colleagues to identify good resource people</p>	<p>Need actual experience not just academic experience</p>	<p>Lack of time and market access for resource materials</p> <p>Not always easy to find what is needed</p>	<p>Best resources are USDA, co-op development centers; AgMRC website; Quintin burdick Ctr.; Board training at NRECA open to anyone; Toolbox for housing co-ops – HR resources used and CDF conference on manufactured housing that was recorded</p>
<p>Brian Briggerman, KSU</p> <p>Governance call Leslie Kauffman at KSC or Mike Boland for an academic;</p> <p>Patronage talks to Greg McKee or Brent Hueth; finance/tax CoBank or a local auditing firm in KS; Phil Kinkel and Mike Boland are esp. qualified</p> <p>NCERC; NCFC Capper Center, CoBank and AAEEA are organizations that help him to find out about resources</p>	<p>Effective curriculum development needs good communicators and teachers with the knowledge; need to know the audience and how learning outcomes happen; engaging and interactive workshops that are not preachy, for example a finance distribution excel worksheet and that exercises promote dialogue.</p> <p>Create more online or simulation games. Phil Kinkel has an excel spread sheet that</p>	<p>Lack of time and funding are challenges – funds need to come from industry. He does not have time to look for and create curriculum currently.</p> <p>U of WI Center for Cooperatives &amp; the state councils are good quick access sites.</p> <p>Own resource is <a href="http://lacc.k-state.edu">http://lacc.k-state.edu</a> and was developed by student workers</p>	<p>Textbooks are heavy on economics and best used in classroom</p> <p>Information exists but needs to be refreshed/updated or made more interactive/modern</p> <p>Think about how to use materials in training?</p> <p>Well written, understandable; with education component—engagement, key learning. Think about how one will</p>

	could be the start of a simulation game. Would need a classroom environment for direction & questions – too detailed for the general public. Purdue has an ag. Business retail game.		educate with it not just looking for information
Bill Patrie Canada is a model for great training resources	Toolbox kit by Northcountry; Make no small plans by Eggerstrom; Cobia's book; but need more general books about how co-ops affect people's lives.	We need a pull force and co-ops could do this;	Native Americans have distrust of "democracy" due to experience with US government; shift culturally in recent years to greater emphasis on individual ownership rather than shared ownership; tribal councils were once like co-ops but not now  Materials need to be practical Need new case examples
Yolanda Cotterall & Jaime Villalaz  Resource people: Margaret Bau, Margaret Lund, Audrey Malan and Anne Reynolds Bill Patrie gets at soul of why one develops co-ops. Need that type of language more often	Effective sources for their purpose drawn from CW training, Mondragon, La Montanita.  CW was critical  Whole Brain Training. Experiential learning so that lessons sit deeper	They have difficulty locating suitable materials. They typically try to figure out things on their own rather than call on others. It is trial and error. Lack resources on how to do training and teach about the practice of co-ops	Working with the Latino population, they have a curriculum that is 3 sessions. First is what a co-op is; second is "before and beyond" why they are forming a co-op & what the development process looks like; & third is how to conduct a board meeting

<p>Gap in Yolanda and Jaime's knowledge of co-ops re: finance and patronage</p> <p>Especially confident in CW resource materials</p>	<p>There are materials that have been created in Argentina, Chile, Spain and Brazil but are they relevant? Can we use them?</p>		<p>Need curriculum that has cultural competency (translated materials) with Latino trainers</p> <p>Educators need to be able to be creative and innovative; translate materials so "everyman" or common man can understand it; accessible format; focus on experience for adult learners.</p> <p>Yolanda incorporates "the Whole brain" teaching approach</p> <p>Demand for Latino specific training in CO, NM, MI</p> <p>Most materials are linear information that require a level of reading and certain education level. They are intended for students and faculty. If one is uneducated, they shut down &amp; stop learning because of defense mechanisms. Challenge with adult learners is to keep everyone</p>
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