



Developing Performance Indicators with Co-operatives

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Introduction

- CEARC commenced a pilot project in May 2017 to develop performance indicators with co-operatives
- Project known as the Co-operative Performance Index
- We interviewed 15 coops/CU's across Canada and selected 12 to participate
- Identified 12 co-operatives/credit unions across Canada to participate in the pilot project

Introduction

- The project is operated in a participatory manner – with the coops and CU's selecting and agreeing on 12 indicators that they believed reflects their 'co-operativeness'
- This participatory action research project involves co-operatives from each geographic region of Canada, French and English, and various types, industries, sizes and maturity
- CEARC obtained 2 Mitacs grants to develop a web-based app to hold the data
- The app facilitates collection of data and production of reports

KPI's selected at May 2018 meeting

Principle One: Voluntary and Open Membership

Indicator	Metric
Open Voluntary	Is membership voluntary? y/n
Barriers to becoming a member	Second tier co-op: do you have formal policies on the conditions of membership? What is the ratio of new members to previous membership?

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Principle Two: Democratic Control

Indicator	Metric
Membership election participation	What is the % of members voting in annual election?
Opportunities for members to make decisions outside of annual elections le referendum, resolutions, plebiscites, committees with decision making authority	# of opportunities for the membership to make decisions for the co-op.

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Principle Three: Member Economic Participation

Indicator	Metric
Surplus use	What do you do with your surplus/net savings? Please provide percentage: Indivisible reserves Reinvestment/ setting up reserves Patronage Others
Member equity	What is member equity expressed as % of total assets?

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Principle Four: Autonomy and Independence

Indicator	Metric
Ownership of Capital	What is the % of capital contributed/owned by members versus external sources (external investors)? What is the % of capital contributed/owned by members versus external sources (debt)?

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Principle Five: Education, Training and Information

Indicator	Metric
Employee education and training	What is the average hours of training per year per employee?
Member education and training	What is the % of revenue on ed/training?
Director/Board education and training	What is the % of revenue on ed/training?
General public information	What is the % of revenue on ed/training?
Add in examples:	Here is a worksheet on how to get to this

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Principle Six : Co-operation among co-operatives

Indicator	Metric
<p>Collaboration with other co-operatives le research, partnerships, joint projects, community projects, secondment, transfer, advice, new co-op dev.</p> <p>Business done with other co-operatives.</p>	<p>What is the # of co-ops your co-op collaborates with? Provide range Point system(maybe?)</p> <p>Does your co-op have a policy to procure from co-operatives? Yes/no</p> <p>What is the # of co-ops your co-op does business with as a client? Provide range</p> <p>What is the # of co-ops your co-op does business with as a supplier? Provide range</p>



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Principle Seven: Concern for community

Indicator	Metric
Responding to community needs	What do you do with your surplus/net savings? What is the % of pre-tax profit donated to community (needs to define donated) How does your co-op respond to your community's needs? Please provide a percentage: Philanthropy
Business done with local businesses Business done with businesses with shared values Environmental impacts	What is the % of procurement from local (geographical) businesses? What is the % of procurement from businesses with shared values? Does your co-op have environment impacts goals, policies, practices and/or reporting? Yes/No If yes, what do you do? List: GHG emissions, products and services that support, environmental footprint sites provided as links

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Plans for Year 2

- Group indicated they felt it would not be wise to add a lot of new participants
- However, since a few of the initial participants have dropped out of the project, it was agreed that a few new coops will be added for Phase 2 of the pilot
- Need to: finalize indicators and metrics, tweak CPI tool, have participants input data
- Need to discuss: confidentiality/ privacy issues, what kind of reports, formats of reports

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