

From Principle to Practice: Co-designing the Co-operative Sector of the Future

[OCA Webinar Series Information](#)

Workshop #3 Reflections

Inclusive Design Research Centre, OCAD University

March 29, 2023

Summary

Leadership from the margins

The insights gained from this workshop series indicate that inequities in the co-op movement cannot be addressed without the inclusion and input of those who are not currently members of formal co-operatives. Those in marginalized groups who aren't aware of co-ops and how they can benefit from them, as well as those in the informal co-op sector and the underground co-op economy, should directly participate in the co-creation of Principle 8 and the development of practices that apply the existing Cooperative Principles towards a more inclusive co-op movement. Taking such an inclusive co-design approach will help to ensure that efforts to address these issues will meet the needs of those previously excluded, and in so doing will expand the reach of the co-op movement and help to grow the solidarity economy. As one participant stated, "co-ops need to see themselves as part of a much bigger solidarity economy ecosystem."

Addressing systemic barriers

Several participants expressed their belief that the current principles already address aspects of diversity, inclusion, and equity, but that they are not explicit enough or are not always sufficiently put into practice. Many feel that the adoption of a new principle that explicitly addresses diversity, equity and inclusion would shine a much-needed spotlight on the systemic nature of these issues and give co-ops guidance and motivation to examine their organization's policies and practices. We need to approach the adoption of a new principle with great care in order to avoid a "solutionist" approach where it becomes just another checkbox on the compliance list.

Access to resources and education

During the workshop, some participants identified limitations of time and financial resources to take the necessary steps to address systemic exclusion and inequity in their co-op and in the co-operative movement as a whole. In addition, some pointed out that many members of marginalized groups do not have the privilege of time to participate in co-operative governance, which can lead to underrepresentation and a lack of lived experience being applied to decision-making. One participant noted that people can be reluctant to join a board where they might not see others like them or feel that they belong, thus identifying the need to be proactive and reach out to underrepresented community members. Many participants highlighted the essential role of education and training to bring awareness to all levels of a co-op from the board to individual

members. Providing financial and other support for co-ops to take the necessary steps towards greater inclusion, including support for education and training, will be critical.

Recommendations and Next Steps

1. Work together with community connectors and advocates to reach those who are not currently participating in the co-op movement – those in marginalized groups who aren't aware of co-ops and how they can benefit from them, as well as those in the informal co-op sector – to bring them into a co-design process on inclusion in the co-op movement.
2. Form a working group with those outside and inside the formal co-op movement together with participants from this workshop series and other individuals to co-create guidelines and practices for a more inclusive co-op movement.
3. Work with inclusion and equity experts to ensure diverse voices are included in this working group and that they have access to the means to lead the co-creation process.
4. Offer an ongoing communication channel or mutual support group for different co-op organizations and their members to continue this conversation and share their experiences around justice, belonging, inclusion, equity, and diversity.

Workshop 3 Discussion Points

Perspectives on Adopting Principle 8

A new principle is needed

- Systematic exclusions, power dynamics, oppression, and barriers are not often visible and they are easy to miss. Calling out P8 will give co-ops an opportunity to examine their practices and policies, identify ways to reach out to equity-deserving groups, and include (Justice) and EDI in the decision-making and power structure.
- The best way to make it concrete is by adding it in the language, creating another principle with a sole focus on DEI. Language is powerful. The other principles are not about DEI; a new one would be and how do we make this important.
- Current principles are not specific enough. We need opportunities beyond “you are welcome in this space”. We need opportunities to center people’s experiences who are vulnerable/left out.
- P8 is a lens through which the existing systems and the current principles should be viewed, reviewed, and examined.
- We need to include P8 and call it out for the importance of representation - the co-op movement is not as diverse as it should be.
- Equity has to be highlighted and we have to focus on equity for all, all people and all countries
- Consider principles for a specific coop, but also at the level of a sector as a whole, and the movement we’re trying to create. How can we do a better job in training at this broader level?
- Does our board look like our community? Does our staff look like our community? If not, how do we change that? We need a mechanism to be able to do that- a defined principle.
- P8 would have value in creating a defined goal and separate principle with defined tasks, e.g. balanced scorecards to measure alliance with the 7 principles, how is your co-op fulfilling the principles, how do these principles tie us together as a sector?

The current 7 principles need redefining or better implementation

- First we need to re-examine the current principles and focus on putting them into action.
- Apply a DEI lens to all of the principles instead of creating a new principle just for DEI.
- Time spent on creating P8 could be better spent working on putting the existing principles into practice with a focus on DEI.
- If your community is predominantly one of privilege what is the onus to create systemic change and to upset the current norms that exist today? Do we think that we can shift behavior through creating and adding the co-op principles?

The current 7 principles are sufficient

- Principle 7 already captures the values of P8. Cooperatives work for the sustainable development of their communities through policies approved by their members.
- Inclusivity should be clear in Principle 1
- The first 4 principles are already about diversity, equity, inclusion and transparency. Independence = transparency
- A combination of Principle 2 (Democratic member control) and Principle 3 (Members' economic participation) equals equity.
- All principles are inherently inclusive and have the tools already. We need to take action to commit to the values inherent in the co-op principles and advance our understanding about these values and principles.

Examples of successful practices to support inclusion

Theme: Regular check-ins and meetings

- Quarterly and weekly meetings to address the 7 principles and DEI as well as justice, belonging and decolonization.
- Creating open-door check-in times to discuss, but also more anonymous forums where people can express needs when they may not feel safe or included.
- Value to having a reflection at the start of each meeting - reviewing guidelines, practices, etc. Make a point to be reflective and recommit to said agreements.

Theme: Partnerships and allyship

- Ask: how are we partnering with others who don't look or act like us, who speak a different language (when applying for grants, developing new programs, etc)?
- Make intentional partnerships and build those organizations up and support our own gaps.
- How do we interact with each other with the most integrity? Example: making land acknowledgements—need to go further. Making a practice is really important—reviewing the guidelines, agreements that are the basis of a gathering, meeting, or organization.
- Instead of just a land acknowledgement, we made a committee called Beyond Land Acknowledgements to go further.

Theme: Education and training

- Take language barriers into account when developing training programs.
- Stay informed and continue learning as a staff and as members.
- Holding a DEI workshop at DGHC for our members on how to actively include members who identify in different groups. Working with 519 Centre in Toronto, to create a policy

and workshop with their members, so we can have more education. We do anti-oppression training too which is very impactful.

Theme: Putting specific principles into practice

- GIA Co-op - we have built our organization foundationally on the co-op values and principles. We use it as our lens for decision making and inclusivity.
- Terminal City Glass Co-op (BC) - We are using the co-op principle of Concern for Community to drive our strategic plan. Now coming to the end of our 3 year plan we used this principle to operationalize the creation of a project called Learning Fire which serves underserved youth in our community to learn a skill and a trade. We also used the foundational principles to guide re-looking at our mission and values this year.

Theme: Policies and practices

- Actively working on creating a DEI policy
- Skill Squirrel platform allows for targeting specific sectors of society with employment challenges, such as BIPOC, youth, people with disability, women. They can find opportunities that match their needs.
- We have policy and education/training and we have a very active Indigenous Circle that is working to create Indigenous content for the programming at our theater (arontheatre.com)
- Engage members in what an ideal workspace would look like, and shape policies and practices in support of that. E.g. Scheduling the day around the calendars of members, what would work for them during an event, prayer time, food service, etc.
- Apply a feminist lens.
- Policies of working together. The business belongs to everybody; nobody should have control. Linking to other co-operative groups / mentors who can support them through this journey.
- Rest is a key component (informal/formal) - take a break/retreat every quarter for members to rest! Fatigue is a real issue that affects these groups. Also shows value and appreciation.
- Financial community - come one come all - active reviewing their policies to insure inclusion. E.g. Their application was excluding trans folks because of the regulatory requirements. They consulted with a regulatory agent to work towards amending their application to be more inclusive.

Theme: Leadership

- Co-operative sector requires more leadership to commit to a deeper level of inclusiveness.
- I (male participant) have been on the board of a housing co-op for several years. In the last term, I decided to withdraw to welcome more women to the board. I asked for more gender equity on the board requesting at least 50% of the board members to be women.

Barriers to supporting inclusion

Theme: Current principles need attention

- Principles are the blueprint to equity. Look around the room- diversity is not there- principles need to evolve and change. The current principles are not everyone's lived

experience. They need to be transformational, need to be worked into all aspects of the co-op operations and viewed through the lens of DEI.

- We are looking for new opportunities to learn- principles are there but what do they really mean? What are examples of the principles in play? Without adding additional wording to make it more confusing.
- The “Why” is clear, but what is the “How” that a co-op principle could convey that a co-op could put into practice?

Theme: Systemic barriers

- Systemic barriers (as women and racialized communities).
- For housing co-ops it comes down to health issues, mental health issues, time and financial constraints, for holding meetings, technology help for seniors, barriers to education for some members, accessibility constraints.
- When we do workshops- are they meeting the needs of our members, are they accessible, is the language accessible, are there diverse faces, the images on our website, when we are budgeting for special projects- examining everything to ensure it is representative of the members we are representing- do our members see themselves reflected in our organization- are people willing to hear what being equitable truly means.
- Many people, like a single mother who has to find childcare for her kids during a 3 hour board meeting, cannot attend these meetings whether online or in person. We are at a point that we can't even ask for volunteers to help.
- Not everyone is on board for a variety of reasons. It goes back to lived experiences and how their co-op has operated in the past.

Theme: Co-op awareness and education

- Money and energy would be better spent on educating lawyers (rather than debating/adding P8). Not a single law student or lawyer knows about co-ops.
- Is it the role of individual coops? Or of the federation? The promotion of the model, how to get everyone to talk more about it – Association of cooperative educators do a good job.
- Some of the restrictions of leveraging the co-op principles and values is learning, understanding and education of our board and staff.

Theme: Connection and communication

- Even when all members are invited, not all of them show up to the meetings.
- During COVID19 they experienced lack of communication with their members. Many people didn't participate in Zoom meetings - that could be related to limited access to technology, internet, and skills to use platforms such as Zoom.
- We invited several people to be on the board however many of them didn't even respond to the invitation.
- We need to examine why people are not participating. Are they just invited or are they genuinely included and have the means and powers to make a difference? Do they think if they join the board, their voice will be heard?

Theme: Financial and time limitations

- There should be some financial resources at OCA to support access of those groups to be able to attend these meetings and meaningfully participate. We need more funding to implement the current 7 principles.

- Often we don't have the resources to help address the barriers (e.g. funding for legal support).
- Obtaining resources in the community, like qualifying for loans.
- Asymmetry of contributions between members.
- Tension between resources, money and equity.
- Time for education with board and staff.
- Many of us sit on several boards and we literally have no time to participate in board meetings. We have to be more transparent about the time and commitment required from the board members so people can make the right decisions that work for them.
- Many events by coop organizing events have fees to attend that creates a barrier for people with low-income to attend. Taking time off work to come to the event already has a cost for people.
- Canada vs. US - in Canada, rarely open for free, it's expensive to get in. In the U.S. it's free, they include me, they understand DEI at a different level.

Theme: Capitalist pressure

- Asymmetry between those who were co-owning members and non-member employees (lower wages, reduced benefits). Risk of this group getting stuck as employees rather than members due to lack of time/resources to participate in governance. When a business is running so close to the bottom line margins, this results in compromises on equity—tough decisions that pit.
- Barriers/supports needed to participate fully in the workplace (e.g., childcare) - capitalist pressure on a business (bottom line decisions) are contradictory to creating a more equitable workplace.
- Tension between the external capitalist world and the environment we are trying to create. Co-op is still niche. So we don't just default to the norm. The behavioral things need to be worked on.
- In the US it is federally regulated. In Canada - it's a social movement but focus is on capital interest.
- Working in coop movement for 40 years in US, Canada, Africa, dominant culture likes to squash it, not talk of coops.

Theme: Policy

- Co-op associations need to ramp up efforts around connecting with formal union organizations and advocating for more provincial level policy changes. Leveraging change at the policy level.

Theme: Informal Co-ops/Workers

- Member owners have to be incorporated as co-ops. This is not inclusive of informal co-ops, how can we better serve those groups. We have DEI policy, but we address the sector as a whole (OCA) - talk about incorporated co-ops, not very diverse, just looking at own membership, the incorporated Co-ops, equity-deserving groups – we don't see them there.

What possibilities would P8 open up?

- Design processes that actively reach out and strongly support direct and active participation (over a period of time with various ways to participate that are facilitated and resourced properly) from a diversity of people.

- I think that one thing we need to consider is that the principles are intentionally open to interpretation so that they can be inclusive of all different types of global co-ops. With Autonomy and Independence as one of the principles that needs to also be protected and considered.
- We want to make sure if we are adding to the principle, there are concrete things they can do, not just adding on a sticker.

How can we co-design P8?

- Must be created by those most affected by P8, those who are marginalized.
- Can't be created by those already in leadership positions.
- Every step of the way, the norm must constantly be interrogated. We are uprooting a systemic institution.
- In the sector there are some barriers about who is and who is not a co-op. This relates to who is and isn't in the room around P8. Those in an underground economy, those who are marginalized, like ROSCA's, are not in the co-op space.
- Who has time to be on a board of governors? Direction is set by those who have privileged time resources.
- The framework I want to use is that the co-op sector has to have the awareness (and humility?) that co-operatives are still mimicking the capitalist/colonial model. Co-ops have to see themselves as part of a much bigger solidarity economy ecosystem. We need to open up the dichotomy of formal vs. informal co-operatives. Consider those who don't want to be found because they have been so marginalized.
- Structures outside of the co-op movement need to be created.
- We need to find communities who can benefit from co-ops but are not even aware of co-ops. We have to find out why they are not aware and include them in co-creation of P8.

Actions to co-create P8

- Examine the action items involved in P8 and use that as a lens to review the other 7 principles. P8 could be an anchor and a base for the other principles.
- Consider things that you do at your AGM's, on social media, your communications. Are you doing your best to reach all of your members as a whole, not just select a group of members? There is a core group engaged but not so for everyone.
- What could OCA be doing?
 - encourage their members to evaluate their internal interpretation of their principles as an advocacy organization.
- We need to figure out who lives in our communities. Based on that, how do we apply those principles to the communities that we serve? If there are predominantly a.b.c cultures there, how do we serve them?
- We need to look back at our organization. Look who is on the board, who is in our community. Who is in our community that doesn't have a representative on the board.
- People can be reluctant to join in on a board where they might be very different. So taking action to be proactive and reach out to them to uncover those barriers.

Support needed to be more inclusive and put principles into practice

Theme: Create Guidelines/Tools

- There are lots of people with their hearts in the right places but they don't know where to start or what to do.

- We have to work together from different co-ops to create guidelines for practicing DEI in all the principles and specifically P8. For co-ops that don't have the human resources and funding and time, these guidelines can help them build awareness and give them ways to implement DEI in their organization.
- Create a chart that demonstrates how we can do DEI work relating to each principle and then the 8th principle can tie it all together.
 - Deconstruct each principle to talk about how we can be more inclusive.
 - Show examples or expand on it to provide more intentional language, what do we truly mean by that.
 - Recognized different lived experiences.
 - Expanding on what those principles really means.
- Create a tool to help co-ops review and reflect on the principles and evaluate their principles to see whether they are living their principles in a way that reflects DEI

Theme: Education

- OCA should help to educate organizations.
- Education for the younger generation.
- Putting together a workshop around the idea that principles are a blueprint for equity and need to make sure we take time and set the tone that what we are doing is accessible and inclusive.
- Offer workshops to manage biases and identify what actions reinforce biases and stereotypes.

Theme: Financial Support

- The barriers of cost and access to information make it so people will go elsewhere (other business models, other jurisdictions).
- City of Berkeley, City of New York, City of Oakland have a Worker Cooperative budget that funds organizations for developing cooperatives. Could we do the same in Canadian cities?

Theme: Accessibility

- Commitment to accessible communication
 - Ensuring our websites and other documents are in plain language, use simple explanations and can be easily translated by available tools, such as google.
 - Include display preferences on your website and other communication material, such as option to resize text and read aloud for people with visual impairment.
- Be more gender inclusive. Remove marital status and include various gender pronouns.
- Remove credit scoring to include people who cannot afford to buy homes and build generational wealth.
- Partner with accessibility organizations to collaborate with language interpreters including sign language and other accessibility specialists.

Theme: Other approaches

- The Canada Federal Cooperative Act is updated but unsupported. The Provincial Acts are outdated for digital commerce. This gap requires cooperation to make it accessible.
- Think about reconciliation, how does that fit in?
- Ensuring that there is Commitment to embedding the principles of DEI at all levels of the co-operative, including bylaws, policies, operations, special projects and meetings. And that there is ongoing assessment of how we are doing.

- We have to approach this both from the top down and grassroots.
 - Top down approach: look at the composition of your co-op board. Who is there, who is not there. Why are they not included in the board? Do they know how to be on the board and they have that option? Aim for diversity in the leadership.
 - Bottom up/grassroot: what community are we serving. If we are serving a particular community with specific lived experiences, are we meeting their access needs? Is it possible for them to participate in meetings? Do they have access to the information they need to be aware of?
 - Make room for people of various abilities, perspectives, and backgrounds.

First step myself or my organization can take towards being more inclusive

Theme: Offer education, training, and resources

- Need to provide more education and training, including onboarding. “Mainstreaming” these issues in the co-operative sector.
- For DGHC - we are taking steps to educate our members on DEI and help our members to make good governance.
- Offer free information sessions on where to find co-op support/information/ connection to existing lawyers, accountants that know co-ops. (CoopZone.coop has a list of co-op developers, accountants and lawyers with co-op experience.)

Theme: Include marginalized voices at all levels

- Continue to support our Indigenous Circle and ensure we fulfill our board matrix regarding JEDI.
- Choices while actively working as a group to make our membership inclusive to our diverse group. We recognize that one group has had more control over other member decisions and we are mindful of making sure that all diverse groups within our community are able to raise their voice.

Theme: Build DEI awareness into how the co-op is led and governed

- Applying an EDI lens to the coop/credit unions governance model, and really consider whether there is democratic control under the system of “recommended” candidates chosen by the board allows for or supports EDI, and then consider in what ways the board can apply an EDI approach to the composition of the board, and an EDI lens to conditions we create in the boardroom to have effective decision-making processes.
- Bring more awareness to this work at the board level.