



Client Satisfaction 2014 and Outcome Measurement 2010-2014

Cooperative Development Institute

Table of Contents

Executive Summary.....3

Introduction3

Rural Cooperative Development Goals & Outcomes.....5

Discontinuing the Development Process.....5

Value to Members5

Profitability and Business Planning.....8

Effects of Support Services from CDI.....8

Quality of Support from CDI.....9

Likelihood of Recommending CDI 10

Perception of CDI..... 12

CDI Strengths..... 14

Improving CDI’s Support for Cooperatives 18

Outcome of Collaboration..... 21

Interest in Specific CDI Services..... 23

Issues Facing Cooperatives Today 23

Advice to CDI 27

Additional Comments 28

The Top Words Used
to Describe CDI

Helpful
Cooperative
Resource
Support

Executive Summary

The following report contains many details and specific sources of ideas for how to improve the quality of our services and support for cooperative development in the Northeast. Overall, the good news is that people appreciate a lot of what we do, and according to the measures we have, what we do is working. The challenge, as always, is to do more of it, but also to make it better known what we do and why people should be interested in cooperatives and cooperative development, in order to build partnerships and support for this work. Indeed, partnerships and networking emerged as a significant emphasis in this year's survey.

Respondents expressed a great deal of interest this year in internal organizational systems and communications (both internal and external), as well as access to financing. This year we continued to do well on responsiveness and availability, but we get the most negative results when we are "tone-deaf" to cultural needs of various kinds. Our challenge is to produce results without neglecting sensitive attention to individuals' and groups' needs. That said, both our personal commitment and our responsiveness received praise. In terms of extending service offerings, people were looking for legal and technical help, as well as help motivating volunteers.

Introduction

After participating with *CooperationWorks!* and National Cooperative Business Association in discussions regarding how to go beyond traditional economic measurement to assess the value of our work to cooperatives and the value of cooperatives to their members and their communities, we developed and conducted an expanded, in-depth outcome measurement survey of clients who received Intensive Technical Assistance from CDI over a five-year period. Given the voluntary nature of survey participation, the response yields a slightly different set of clients every year. Despite these data problems, the resulting findings provide us with important insight regarding cooperative development outcomes and needs, and provide CDI with a deeper understanding of the value of our services as well as recommendations for future programming. In addition to the data collected through this survey, CDI's client database holds additional information such as the year technical assistance was initiated and year that the cooperative began. This historical data allows CDI to assess its effectiveness in reaching its outcome measurement goals as defined in the Stated Goals section below.

In recent years we introduced some new elements in our survey, including questions more tailored to housing co-ops, an assessment of likelihood to recommend CDI (widely considered a good rough measure of satisfaction¹), a question regarding people's instant perceptions of CDI, and a request for advice to CDI.

1 Though the measure has its critics. See for example <http://blog.vovici.com/blog/bid/18204/Net-Promoter-Score-NPS-Criticisms-and-Best-Practices>

Response

In Spring of 2015, the Cooperative Development Institute surveyed current and former clients to collect information about the effectiveness of CDI's services and the satisfaction clients had had with these services. Seventy-five surveys were distributed to clients, of which 64 were returned, an 85% response rate. We sent 34 surveys to collaborators, and received 25 responses, for a response rate of 74%. We also surveyed groups that made inquiries, but with whom we did not work intensively, in order to assess CDI's responsiveness. Eighty surveys were distributed to inquirers, but only twelve were returned, for an inquiry survey response rate of 15%.

Surveys were mailed to three different groups:

- » The "Inquiry Survey" went to groups that contacted CDI for assistance from April 2014 to March of 2015 and received up to 10 hours pro bono guidance and referrals. Eighty groups fell in this category; 12 returned surveys (15% response).
- » The "Collaborator Survey" went to 34 organizations with whom we worked on a collaborative project in 2014-2015; 25 of these partners returned surveys (87% response).
- » The "Client Survey" went to groups that received more intensive assistance in the past year or years. Seventy-five groups fell in this category; 64 returned surveys (85% response).
- » Fifty-eight of the respondents received assistance in 2014-2015; others received assistance in earlier years.
- » Nineteen respondents are in organizations that are still in development; four have stalled or discontinued development; 41 have launched and are in business.

Respondents from existing cooperatives reported serving an aggregate of 5,487 members, and had 180 employees, 38 of which were added in the last year. These businesses reported aggregate 2014 revenues of \$12,750,231. The respondents whose businesses have not yet launched (or converted) expect to serve an estimated additional 2,884 members and hire (or retain) about 48 employees (the majority at two businesses engaging in conversion to employee ownership).

Fourteen percent of the emerging and existing cooperatives were consumer food co-ops; 17% were in the agriculture or fishing sector; 27% were service co-ops—16% in retail or consumer services, and 9% in shared or business services; 50% were housing co-ops. Nine percent of the businesses or organizations were arts-related, and six percent provide social services³. Thirty-one percent of the respondent organizations were owned (or to be owned) by workers, 58% by residents, 23% by consumers, 13% by producers (agriculture/forest/fish or artisan), and 9% by businesses and organizations.

2 We counted full and part-time employees equivalently, but did not count seasonal, planned employment, or volunteers. When a range was given we took an average and rounded down.

3 The percentages add to more than 100% because some co-ops identified with more than one sector.

Rural Cooperative Development Goals & Outcomes

As part of our USDA Rural Cooperative Development Grant performance measures for the last fifteen years, CDI has assessed whether and to what extent it achieves the following two goals. The data determining these outcomes is collected through the 5-year client survey as well as CDI's client database.

Goal #1: 50% of the start-up cooperative projects that have received intensive technical assistance from CDI over the past five years will move into business within three years of planning, fundraising and organizing.

Outcome #1: Of the 81 cooperative start-up projects we served intensively between 2008 and 2014, 57 have become operational within three years of receiving technical assistance. Four were already in business when CDI TA started. One has gotten into business, but not as a cooperative. Six other projects have stalled. Therefore 57 out of 66, or 86%, of the cooperatives that CDI supported as start-up ventures and that decided to proceed with their business have become operational within three years, surpassing our goal of 50%. Three projects that have not yet opened for business are still within their first three years of planning, fundraising, and organizing.

Goal #2: Within four years of becoming operational, 40% of start-up projects launched will: a.) move into profitable operations, b.) sustain a strong membership base and c.) bring significant economic value to their members as defined in their business plan.

Outcome #2: Of the 78 cooperatives that CDI supported since 2002 during their start-up and that have launched their businesses, we have data on 68. Of these, 25 are not yet profitable, but have been in operation for less than 4 years. Of the remaining 43, 22 or 51% achieved profitability within four years

of launch, surpassing our goal of 40%. One of the remainder achieved profitability 7 years after launch and five years after the start of support from CDI. Thirteen groups that launched since 2002 have since gone out of business.

Discontinuing the Development Process

Four of the groups that responded to the survey this year have projects that have stalled or been put on hold. One halted the conversion process due to financial difficulties; one stalled because of lack of capacity to handle complex decisions, but has since re-started; and the other two are still proceeding, just slowly.

Value to Members

When asked to select from a list of responses to the question "What is the benefit of your cooperative to your members?" most existing cooperatives noted 'community' and 'ownership' first (each 74%) and 'democratic participation' next (71%) followed by 'shared values' (59%). These top valued benefits were followed by 'affordable rent' (50%) and then by 'access to trustworthy information' (41%), 'control' (38%), and 'affordable prices for goods and services' (35%). Next came 'better quality products & services' (29%) and 'market access' and 'responsive customer service' (both 26%), then 'alternative or more product choice' and 'education/training opportunities' (both 24%). These were followed by 'access to services', 'opportunity for employment', and 'patronage refunds' (all three 21%). Finally, the least noted value to members was as usual 'political access', at 3%.

Additional 'other' benefits included:

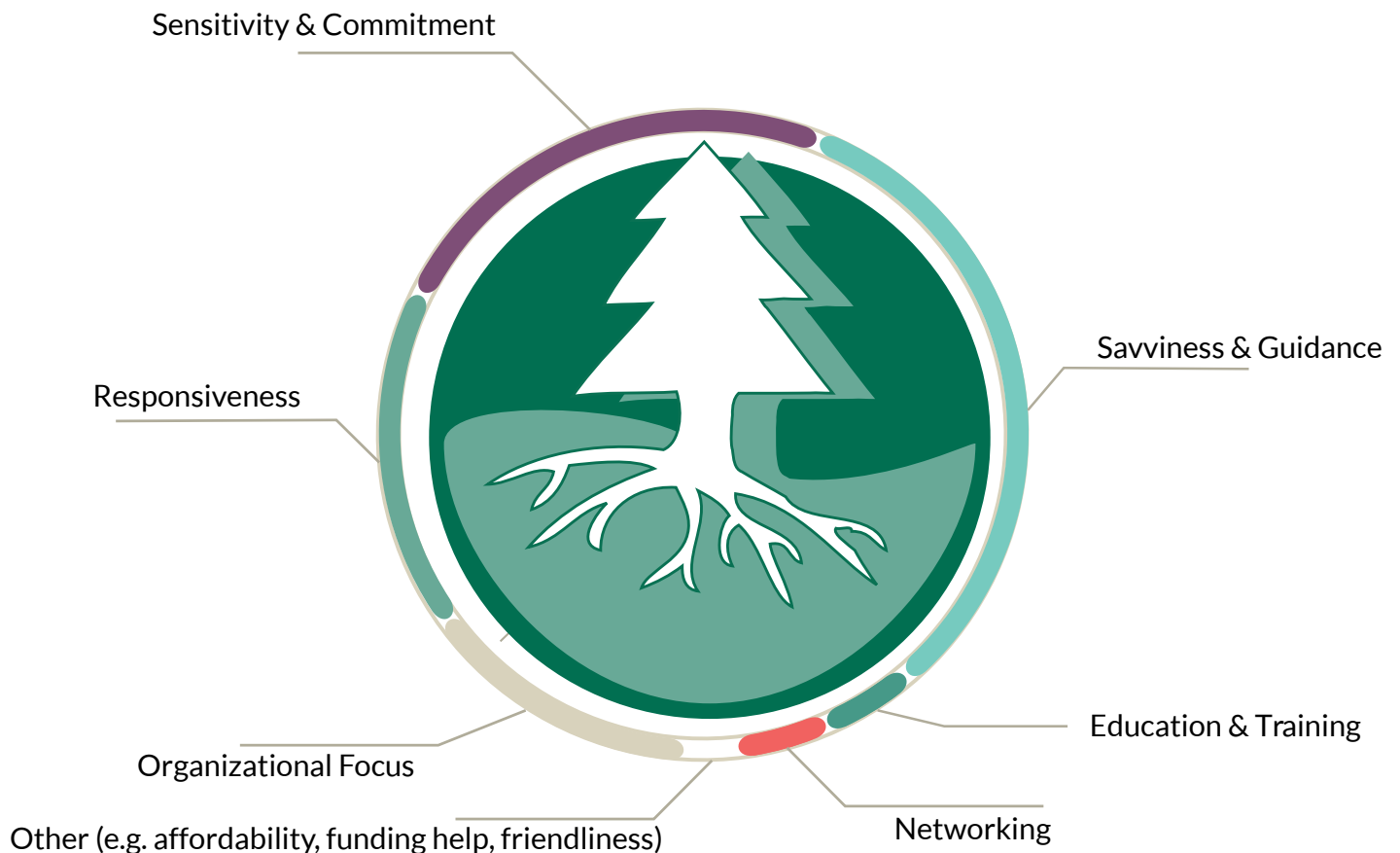
- » communal living
- » to be [able to] function independently
- » Structure through which they can provide writing/editing services to clients
- » more access to locally produced goods

For groups that have not yet launched their business, the most important perceived benefit by far of forming a co-op was 'community' (selected by 94% of respondents), followed by 'democratic participation' (83%), 'ownership' (72%), and 'shared values' and 'education/training opportunities' (both 61%). These were followed by 'control' and 'opportunity for employment' (both at 50%) and 'affordable prices for goods and services' (44%). Next came 'responsive customer service' and 'access to services' (both 39%). Then came a large cluster, with 'more affordable rent', 'access to trustworthy information', 'better quality products & services', and 'market access' (all at 33%). These were followed by 'alternative or more product choice' and 'patronage refunds' (both 22%). The least important perceived benefit was 'political access' (17%).

Additional 'other' benefits noted were:

- » Connection to and cooperation with other collaboratives
- » Affordable home ownership.
- » Humanitarian, Environmental and Vocational
- » Growth of several projects under the Collective umbrella

The choices from existing and emerging co-ops for this year and the last several years are arranged in descending order of frequency of selection (see below). From this table, we can see a fairly stable grouping near the top, consisting of 'community,' 'ownership,' 'democratic participation' and 'shared values'. Consistently among the least noted benefits are patronage refunds and political access. The other benefits show more variability in ranking from group to group and year to year.



Why CDI: Top categories of responses For more, see the section on CDI's strengths on page 14.

Ranking⁴ of Benefits Perceived by existing (EXT) and emerging (EMG) co-ops, 2008-2014
(values in table are % of respondents that selected this value)^{5, 6, 7, 8}

Benefit	EXT 14	EMG 14	EXT 13	EMG 13	EXT 12	EMG 12	EXT 11	EMG 11	EXT 10	EMG 10	EXT 09	EMG 09	EXT 08	EMG 08
Community	74%	94%	73%	85%	81%	76%	69%	100%	74%	86%	81%	95%	62%	80%
Ownership	74%	72%	70%	62%	91%	71%	77%	79%	84%	59%	71%	84%	N/A	N/A
Democratic Participation	71%	83%	68%	64%	69%	71%	77%	68%	71%	68%	57%	82%	62%	40%
Shared Values	59%	61%	54%	62%	59%	65%	58%	79%	81%	73%	67%	74%	46%	80%
Control	38%	50%	59%	31%	59%	29%	42%	42%	61%	45%	62%	74%	54%	55%
Education / Training Opportunities	24%	61%	38%	46%	41%	53%	42%	68%	52%	73%	38%	63%	54%	60%
Access to Trustworthy Information	41%	33%	41%	62%	47%	59%	54%	53%	48%	59%	43%	58%	38%	50%
Better Quality Products & Services	29%	33%	43%	46%	41%	47%	42%	37%	52%	32%	52%	42%	69%	60%
Access to Services	21%	39%	38%	54%	44%	29%	42%	58%	52%	82%	33%	47%	23%	60%
Opportunity for Employment	21%	50%	27%	38%	31%	41%	35%	58%	48%	45%	38%	47%	54%	50%
Affordable Prices for Goods & Services	35%	44%	41%	31%	34%	53%	38%	63%	35%	45%	29%	42%	23%	50%
Alternative or More Product Choice	24%	22%	32%	31%	34%	29%	54%	47%	48%	41%	43%	37%	38%	50%
Market Access	26%	33%	30%	23%	31%	41%	42%	26%	52%	45%	38%	32%	31%	60%
Responsive Customer Service	26%	39%	22%	15%	28%	47%	46%	21%	42%	45%	48%	37%	31%	40%
Affordable Rent	50%	33%	41%	23%	34%	29%	23%	21%	16%	27%	5%	37%	N/A	N/A
Patronage Refunds	21%	22%	22%	31%	22%	24%	23%	21%	32%	18%	33%	16%	38%	10%
Political Access	3%	17%	3%	8%	9%	12%	15%	11%	16%	27%	19%	21%	8%	20%

4 The listing in this table has been arranged by an unweighted average 'ranking' over the six years and two classes of co-ops.

5 In prior years "Community" was called "Sense of Community".

6 In prior years "Control" was called "Sense of Control".

7 In prior years this "Affordable Prices for Goods and Services" called "More Affordable Products & Services".

8 In prior years "Affordable Rent" was called "More Affordable Rent."

Profitability and Business Planning

Of the 36 respondents from existing cooperatives we assisted this year, 14 (39%) reported that they were profitable in 2014 (or their last fiscal year) and seven (19%) did not know. In the group that we assisted between 2008 and 2013, one of two reported that they were profitable.

Forty-two percent (15 out of 36) of those we assisted this year met or exceeded their business projections, and six (17%) did not know whether or not they did; 20 out of 36 (56%) reported having a business plan and four (11%) did not know. Fifty per cent (one out of two) of those in the five-year group reported having met or exceeded their business projections and both respondents (100%) had business plans.

Of the 19 businesses that have not yet launched, nine (47%) reported that they have a business plan.

Effects of Support Services from CDI

Based on a list of suggestions, clients were asked to report on what the assistance they received from CDI in the past year allowed them to do. The most frequent response was 'plan for the future' (70%) followed by 'improve our operations' (50%) and 'improve board skills' (48%). Next came 'improve management skills' (37%), followed by 'improve public relations' 'improve member benefits and services' (both 28%), 'get into business' (26%) and 'improve financial skills' (24%). These were followed by 'increase our membership' and 'convert existing business to cooperative ownership' (both 20%), and 'improve member satisfaction' (17%). Nine percent of respondents selected 'improve our profitability' and 'bring cost savings or increased

income to members', seven percent selected 'increase local control over essential products, services, jobs, or natural resources', and four percent selected 'increase our sales', 'add quality jobs' and 'retain quality jobs'.

Other responses included:

- » Bring neighbors together to work for the common goal of purchasing our mobile home park.
- » CDI helped us to start up by providing fiscal sponsorship and offering technical expertise to help us develop worker owned cooperatives.
- » CDI has been helpful in helping me decide the direction I want to go in. We are in the very first stage of the transition (business appraisal).
- » we were able to become a co-op
- » We are in transition to full functionality, and CDI has been essential in guiding us through the process of forming an effective cooperative.
- » CDI assisted with the development of the Collective and assisted with purchase of the property
- » connected us with a consultant who was a good fit for our project.
- » CDI has been working very hard to help us determine the financial feasibility of purchasing our community.
- » we were able to learn about different options for coop structures- very helpful in our process
- » Knowledge in understanding cooperatives.
- » backup and oversee financials

Community

The #1 benefit people gain from forming their cooperative.
OWNERSHIP is a close second, followed by DEMOCRATIC PARTICIPATION and SHARED VALUES.

Plan for the Future

The most frequent effect of support from CDI.
Over half of clients were profitable and met or exceeded their business projections in the last year.

- » create our legal entity
- » Most of our progress / success is directly related to the board / board decisions - CDI advises

Our inquiry survey respondents were asked what they were able to do with the support provided by CDI.

Responses included:

- » Have not started yet
- » Connected with super helpful info
- » Share with others who had been involved with the project and feel more confident in whether or not we had a viable idea.
- » We were able to incorporate our business, secure an EIN and file with the state. Contact with another Arts Coop allowed us to write our Articles of Org and our by-laws with much less struggle than we would have otherwise had. It would have been very helpful if there had been a registry of all the Art coops in the state, or perhaps there are only a small handful.
- » Only we started our communication with CDI, to form the type of cooperative that will be useful and probable in a community the reply is yes and accepted the proposed name.
- » CDI made follow ups and send e-mail of CDI activities and progress, but I said before

our group is not ready yet to face problems brought out in preliminary discussion like: location of structure, licenses, and probably the funds for the project.

- » apply for funding from relevant organisations
- » We were able to demonstrate that organizations nationwide support cooperative growth and rural Sullivan County, which does not currently have worker cooperatives, should explore resources and options.
- » It was helpful to get a sense of what other cooperatives in New England are doing.
- » Move forward
- » Put on a successful conference that exposed many college students to the cooperative model for the first time.
- » nothing

Quality of Support from CDI

Fifty respondents rated the quality of services they received from CDI as clients, with an overall average of 8.8, where 1 = unsatisfactory and 10 = excellent.

Twenty-four collaborators rated the quality of support that CDI brought at 8.6. The overall rating from 13 inquirers was 7.3.

8.8
/
10

Clients rate CDI 8.8 out of 10

Easily accessible, friendly, welcoming, comprehensively knowledgeable, supportive, instilled confidence in us that we could and would succeed when we needed it most.

—Bethany Louisos, C.L.E.A.N. Cooperative

Likelihood of Recommending CDI

Thirteen inquirers responded on average that they would be likely to recommend CDI to a friend or family member – 8.6 out of 10. Fifty clients rated their likelihood of recommending CDI at 9.1 out of 10. The proportion of people responding with a 9 or 10 to this question, who can be considered “promoters,” was 78%. “Neutrals” or those responding with a 7 or 8 represented 12%. The remainder of the respondents responding with 6 or less, “detractors”, were 10%.⁹ Twenty-four collaborator respondents rated the likelihood that they would recommend working with CDI to another group with an overall average of 8.9, where 1 = not at all likely and 10 = definitely. “Promoters” were 63% and “neutrals” were 29%. “Detractors” responding with 6 or less were 8%.

The comments from collaborators for “Why or why not?” included the following:

- » A recommendation would entirely depend on the nature of the work and the type of group. I would highly recommend CDI to a group of homeowners seeking to purchase their community or a community owner seeking to sell to residents. I would not recommend CDI to an organization seeking to work collaboratively.
- » -Team is experienced. -Clear delivery and explanation of complex topics to residents. -Good advocates. -Persistent through the unique conditions of various properties.
- » CDI knows what it is doing! Beyond providing the training required for cooperative development - which is the most important thing that they do well, CDI has established itself as the “hub” of the New England cooperative economy. They are considered the “go

⁹ In the future, we plan to ask Neutrals or Detractors, “What would it take to get to a 10?”

- to” team for anything cooperative.
- » In truth, working on forming a cooperative was part of a much bigger narrative when working with the refugee clients, so for our organization it’s as much about learning about cooperatives as it was being culturally sensitive and appropriate.
- » It’s an organization that is open and accessible to a wide range of people that can use these tools and resources.
- » CDI has unique and valuable experience to share with particular business entities, whether in existence or in formation.
- » I would highly recommend CDI to work with other groups. Staff are knowledgeable and friendly. When called upon, they provide necessary guidance to cooperative leaders and to individuals starting a cooperative business.
- » Excellent experience! Lynda’s support was key for the start of our refugee farmer coop
- » We work with many groups that are in need of TA in the exact areas that CDI specializes in. We know that CDI has lots of experience and will do a good job. The only time we might not is if we feel that the cultural or language needs are not a match. In terms of general collaboration, yes, we would recommend CDI since you’re good team players.
- » CDI has quality people
- » Again...CDI is a great resource, but offers limited time (I realize you have limited funding to support TA). Hard to ever book strategic planning meetings the RBDG grant is a great example. [My organization] paid the grant writer \$700, [another] paid \$1,500. I had over 100 hours in this grant. If the grant is awarded CDI will be paid 10% plus contract work approx 19,000. It

would be great if CDI could raise working capital to support grant writing to ensure we get grants like this... otherwise CDI's time invested in the RBDG grant will not be funded and [my organization] is out \$700 plus 100 hours of our time too.

- » CDI is the source for cooperative business development in the Northeast.
- » There are not many organizations that have the practical knowledge necessary to set up operating cooperatives and CDI is one of these organizations. Probably the best known of these organizations.
- » CDI brings a wealth of experience and support for cooperatives and is able to bring that together for a project to start or an established cooperative to grow.
- » Particularly for areas of CDI expertise, like initial co-op development and NEROC. Hopefully with more deals, we'll see BOS join ROC as a reliably successful program, but with only one

completed deal, it's too soon to tell.

- » Collaborations can be hard, challenging (in a bad way), and demoralizing. With CDI, it's the opposite - easy, challenging (in a good way), and uplifting.
- » Really depends on the project. (I'm assuming you mean development partners, not clients for this?)
- » Committed, passionate and resourceful.
- » We make such recommendations regularly.
- » excellent advice, services, and connections to other resources
- » Great to work with, helpful and knowledgeable staff
- » Professionalism mixed with a good touch when interacting with informal community efforts; outstanding knowledge of the field.
- » Strong commitment to progressive economic changes and highly collaborative
- » Have a positive experience

9.1
10

Clients would recommend CDI

Very patient and helpful in giving advice to a fledgling organization as we were just beginning to develop.

—Lauren Errickson, Secretary
Marsh River Cooperative

Perception of CDI

All survey respondents were asked “What is the first word or phrase that comes to mind when you think of the Cooperative Development Institute?” Here are the responses, grouped by theme.

Word/Theme (# of responses in theme)	Additional responses related to the word/theme				
[really/extremely] Helpful (27)	...in effort to help us and educate us in our effort to become a resident owned community.	[Helping]... mobile home parks to become owners of their park. / ... Cooperatives / small Maine Businesses	...to start-up Co-op	Willing to help	An Institution ready to assist and extend information specially to new coops and those that are in the making.
Cooperative (10)	Member owned, managed, and benefited / True Democracy at work	knowing housing is controlled by the people	empowering communities with the cooperative business model	Passionate about cooperative entities.	growth of the cooperative economy
Collaborative/ collaboration/ partnership(8)	Reliable! An important mainstay of the co-op movement	Networked, ...	A smart and critical partner in our cooperative development efforts.	Cohesion	
[Technical] Support (7)	Wonderful...	...for co-ops in the northeast	friendly people	Encouraging	Life boat
Knowledgeable (6)	...with the knowledge needed.	...about coops	Experience		
Dedicated / Generous (6)	Conscious	righteous and admirable			
Professional / excellence (6)	Effective	Timely			
Lacking (6)	not as supportive as you think you are	transaction oriented	Controlling	Difficult	Over extended
Resource[ful] (5)	fabulous resource	great source of information			
Leadership (4)	Leading a way toward the future of business organization.	Proactive	Convener		
Co-op technical assistance (3)	cooperative business planning	worker coop conversions			
[particular people] (3)	Lynda Brushett	Maureen Carroll	Noemi		
Education (2)	Training				
[Other] (5)	Growth	Work	Sponsor	NA	Well intentioned

Here is a “word cloud” to represent these responses in a different way, with words bigger if they have been repeated several times. It is interesting that the most repeated word is “helpful”, followed by “cooperative”, “resource” and “support”. This is broadly in line with the following section, which reports what respondents mentioned as CDI’s strengths, but it puts more emphasis on our orientation toward cooperatives.



CDI Strengths

An open ended question asked about what respondents perceived to be CDI's strengths. Coding these comments into themes, we find that people perceive the following qualities in CDI. One point to appreciate is that more people mentioned availability and good responsiveness than ever before:

- » Knowledge/business savvy/resources/guidance:
 - » 33 comments (11 unlaunched, 14 existing clients, 4 collaborators, 4 inquiries)
- » Sensitivity/engagement/commitment
 - » 23 comments (10 unlaunched, 10 existing client, 2 collaborators, 1 inquiry)
- » Good responsiveness:
 - » 15 comments (5 unlaunched, 8 existing clients, 0 collaborators, 2 inquiries)
- » Organization/administration/facilitation/focus:
 - » 11 comments (4 unlaunched, 4 existing clients, 1 collaborator, 2 inquiries)
- » Educational/training/information opportunities:
 - » 8 comments (2 unlaunched, 1 existing client, 1 collaborator, 4 inquiries)
- » Networking:
 - » 7 comments (3 unlaunched, 1 existing client, 2 collaborators, 1 inquiry)
- » Negative/None/NA:
 - » 7 comments (2 existing clients, 3 collaborators, 2 inquiries)

- » Grant/funding/financing help:
 - » 2 comments (1 existing client, 1 collaborator)
- » Affordability¹⁰:
 - » 2 comments (2 existing clients)
- » Specific project:
 - » 1 comment (1 collaborator)
- » General appreciation of individuals/staff/consultants
 - » 1 comment (1 collaborator)

Below are the comments grouped by theme. Each comment is labeled with its source: (U) for unlaunched clients, (E) for existing cooperative clients, (C) for collaborators, and (I) for inquiries.

Knowledge/business savvy/resources/guidance:

- » ...comprehensively knowledgeable... (U)
- » Clarification on how to proceed in functionality, sustainability, cooperative leadership, cooperative business practice, fiscal and ethical responsibility/practice, and strategic planning and follow through! (U)
- » Staff members are very knowledgeable about the process... (U)
- » CDI knew the legal, structural, institutional landscape... (U)
- » Advice, expertise in worker cooperative and residential cooperative formation, organizational expertise. (U)
- » ...highly skilled and knowledgeable about cooperatives, business management and marketing, board development and leadership, and grant writing. (U)
- » ...brought a lot of good information...
...to the project... (U)
- » knowledgeable; professional... (U)

10 This is a new one that people mentioned this year.

- » They were extremely knowledgeable about the ins and outs of coop models, which allowed us to really dig into what the values and opportunities of the project are. They had such a good facility with the different moving pieces, as well as the opportunities and limitations of each choice moving forward... (U)
- » ...Noemi and Rob were knowledgeable.... and highly capable in helping us explore options to plan for the future. We had to put the project on hold due to financial concerns, unrelated to what CDI was doing for us. (U)
- » Knowledge (U)
- » The TAs are more informed to what the co-ops need (E)
- » The knowledge and know-how of where to go to get what's needed; be it funding or contracted work. (E)
- » ...and knowledge (E)
- » ...very knowledgeable in co-operative dealings and structure, well respected organization locally and nationally. (E)
- » Financial sophistication (E)
- » Knowledge in Cooperative structure and development... (E)
- » Helpful, knowledgeable (E)
- » Willingness... ..to provide detailed information on the appropriate business structure and tax implications/ contacts for our business... (E)
- » Helpful suggestions and support (E)
- » Guidance in the running of our organization (E)
- » experience (E)
- » ...know or can get answers to our needs (E)
- » Ability to solve problems and financial strengths (E)
- » Knowledge base availability (E)
- » CDI has useful materials and

experience for persons interested in starting cooperatives... (C)

- » All the CDI representatives I have met have been very... ..knowledgeable. (C)
- » ...they know what they are doing... (C)
- » Rob Brown knows his stuff. (C)
- » Lynda knows and understands the problems we face. (I)
- » Great knowledge; gearing answers to questions based on our needs... (I)
- » Consistent reliable responses to questions. (I)
- » The experience of the combined staff (I)

Sensitivity/engagement/commitment:

- » Very thorough and supportive (U)
- » CDI was extremely supportive, both to management and employees... (U)
- » ...And their ability to share that knowledge and willingness to think outside of the box in terms of how that knowledge might apply to the specific ideas and circumstances we were facing, was really wonderful. (U)
- » ...extremely helpful & supportive (U)
- » Good listeners; willing to assist... (U)
- » Generosity with time... (U)
- » Jeremiah is able to answer all questions, even ones that seem silly with a respectful, polite answer. He and Sarah have been able to explain everything (sometimes several times) to us so that we can understand it. Jeremiah has always made time for us in his busy schedule. (U)
- » Rob Brown has been astonishingly patient with me... ..putting up with my indecision... (U)
- » ...Down-to-earth approach when talking to residents. Hard-working. Very helpful to and supportive of members of the board. They are the most optimistic group of people I have ever worked with. (U)

- » ...friendly, welcoming... supportive, instilled confidence in us that we could and would succeed when we needed it most. (U)
- » From my point of view: CDI strengths lie with their representative. Their willingness to help all parties involved not just board of directors. (E)
- » Very patient and helpful in giving advice to a fledgling organization as we were just beginning to develop (E)
- » one-on-one mentorship specific to our organization... (E)
- » Mentoring. (E)
- » Hands on advisor... (E)
- » Leadership (E)
- » CDI has guided us through the process and allowed us to learn by experiencing both the positive and the negative (E)
- » Flexibility, commitment, open to creativity. (E)
- » Strong Leadership... (E)
- » Our project is well understood, in other words, and it's evident that care is taken to support the work and people involved. (E)
- » ...and they are passionate about their mission. We always strive to find new ways to work with CDI. (C)
- » ...[very] dedicated... (C)
- » ...generosity; creative ideas (I)

Good Responsiveness:

- » ...responsive... (U)
- » and willing to assist by phone, internet, or visit. (U)
- » ...sent an agent out to visit us in person (U)
- » ...answering my many questions... (U)
- » Easily accessible... (U)
- » always available... (E)
- » ...and ready availability... (E)
- » Being free and available to help (E)

- » ...easy to contact... (E)
- » Flexibility... (E)
- » Being available when we needed advice. (E)
- » ...Always there when needed (E)
- » Availability (E)
- » Quick response... (I)
- » ...available, willingness to help (I)

Organization/administration/facilitation/focus:

- » Walked us through each step from 45 day extension petition to forming our Cooperative to getting a grant and arranging for needed surveys and appraisals. (U)
- » In the limited amount of work I did with CDI, very professional, organized... (U)
- » ...and now, providing me with clear steps towards the future. (U)
- » organizational skills, follow through (U)
- » Proper paperwork, very helpful in helping us attain tax deductible donations. (E)
- » We receive efficient and informed financial services support from CDI. Communications are always clear and timely. The advice, when needed, is helpful and appropriate to our context, history, and structure... (E)
- » CDI did an excellent job of coordinating an evaluation of the infrastructure of the parks and creating a 10-15 year plan. The teleconferencing system worked to do a Q and A session... (E)
- » Helped further strengthen the cooperative business model as an alternative to traditional corporate structure, also using CDI fiscal sponsorship to help us set up a tax-deductible site. You are able to bring your support to the local level where it's needed. (E)
- » CDI is by far one of the best organizations to collaborate with - they are on top of their work... (C)

- » They were flexible and accommodating fiscal agents for an ad hoc coalition of which many were college students putting on an event of that scale for the first time. (I)
- » Organizations... (I)

Educational/Training/Informational Opportunities

- » Provided potential members with education on how worker co-ops function... (U)
- » ...helping me to understand the way a worker's coop operates, providing me with reading material... (U)
- » backing up and making financial easier to understand. providing continuing educational opportunities (E)
- » Good materials for the co-op academy. (C)
- » Very helpful with information on other similar cooperatives in New England. (I)
- » communication and relevant information (I)
- » So far, helpful, informative and ready to support/assist as needed. (I)
- » NA, though the woman who spoke with us did present the information very clearly, and would have been more than willing to work with us. The group was just less cohesive than I thought. (I)

Networking:

- » ...and an extremely valuable resource in making connections. (U)
- » and network (U)
- » ...Helped us with contacts and to short-cut time-consuming research. (U)
- » ...as well as recommendations for useful connections. (E)
- » Solid relationship. Cross referrals, good support around initial co-op development, having common board members helps facilitate communication. (C)
- » CDI was very helpful to our growth in

the past year and helped to connect us to more support and people. (C)

- » ...Helpful hints for networking. (I)

Negative/None/NA:

- » Majority feel [our co-op] is the sore thumb that CDI "has to help manage" to meet lender regulations on a regular basis though do not respect or assist with a lot of our challenges. Have regularly disregarded our steps until the 11th hour to show they are active (E)
- » Pushing us to buy without really having time to absorb the whole concept of becoming owners. (E)
- » Schedule for the project fell apart and final reports are still pending. (C)
- » Rating could be 10 plus but your time is too limited. (C)
- » The quality of information, technical assistance, and overall support that CDI brings to collaboration with [our] network runs the range of 0 to 10. Production and quality of service in most cases are so high but collaboration is so low! As a mission-aligned and contractually affiliated partner in a strategic line of business and as a member of an intentionally, highly collaborative Network, CDI has been an extremely productive but very difficult organization to work with. CDI is the top producer of new ROCs but has the most issues with customer satisfaction, trust, and coop governance/org. dev. post-purchase. CDI staff has done amazing post-purchase work in project management but has significant issues and resentment with [one branch] that continue to undermine the relationship. CDI has made a great expansion into ME but has not collaborated on financing, training, branding in ME

despite Network’s investment and efforts to support that expansion. Management is resistant to working cooperatively with national staff and other Network members making it impossible for field staff to fully collaborate. Field staff seems to be suffering from a lack of structure, guidance, support, evaluation, and professional development and management seems unable to provide same. An overall sense of “us vs. them” seems to exist, despite intimately aligned mission, performance, and earnings. This conundrum affects coop performance and satisfaction, staff performance and satisfaction, and causes constant tension, extra work, and a consistent need to “clean-up”. (C)

- » not sure. They seem to support the idea of growing or transitioning businesses to cooperatives but I have not experienced the hand holding and coaching that I appear to need in order to make my dream of transitioning my business into a cooperative be realized (I)
- » NA (I)

Grant/funding/financing help:

- » ...In addition they helped write a grant. (E)
- » CDI serves as our fiscal sponsor, which is essential for us as we develop our outreach and solicit grant funding for programming objectives. (C)

Affordability:

- » ...and providing the information without charge (E)
- » ...affordable services (E)

Specific Project:

- » 2. We appreciate the relationship that is developing between [our organization]

and CDI to support student efforts to attend cooperative education events. (C)

General appreciation of individuals/staff/consultants:

- » Work is very professionally undertaken and results are of considerable value. (C)

Improving CDI’s Support for Cooperatives

Here are the comments in response to the question on how CDI can improve its services. Coding these comments into themes, we find that people perceive the following areas for improving CDI’s services. Of note, the number of comments recommending better consistency, follow-up, and contact have slightly diminished from past years; there is a small cluster of comments requesting more training on motivating volunteers within co-ops; and a new category of recommending greater cultural sensitivity emerged this year.

- » Don’t know/N/A:
 - » 17 comments (6 unlaunched clients, 6 existing cooperative clients, 5 inquiries)
- » Specific services/TA/information:
 - » 16 comments (4 unlaunched clients, 8 existing cooperative clients, 4 inquiries)
- » More contact/check-ins/follow-up / greater staff capacity / greater on the ground presence / consistency / systems:
 - » 12 comments (3 unlaunched clients, 5 existing cooperative clients, 4 inquiries)
- » Positive:
 - » 11 comments (3 unlaunched clients, 8 existing cooperative clients)
- » More funding for groups/specific projects:
 - » 7 comments (1 unlaunched client, 5 existing cooperative

- clients, 1 inquiry)
- » More cultural awareness/sensitivity:
 - » 3 comments (1 unlaunched client, 2 existing cooperative clients)
- » More networking and learning opportunities:
 - » 1 comment (1 existing cooperative client)
- » More outreach/visibility/marketing:
 - » 1 comment (1 existing cooperative client)

Below are the comments grouped by theme. Each comment is labeled with its source: (U) for unlaunched clients, (E) for existing cooperative clients, and (I) for inquiries.

Don't know/N/A:

- » N/A (U)
- » unknown (U)
- » DK (U)
- » N/A (U)
- » I will be better able to answer that question when we are further along in the process. (U)
- » Can't think of anything (U)
- » I don't know (E)
- » no suggestions! (E)
- » Not sure... (E)
- » None (E)
- » not sure (E)
- » I'm not sure. (E)
- » NA (I)
- » Can't think of anything (I)
- » NA (I)
- » ...not sure (I)
- » NA (I)

Specific services/TA/information:

- » More actual practical support; as in a lawyer to look over documents, provide

- answers to specific questions, etc. (U)
- » We are really going to need technical expertise and logistical help as we grow and develop the worker owned cooperatives. (U)
- » Just have CDI make sure that everyone understands the important stuff (U)
- » Providing or offering (or directing towards possible) mentorship (this is something I would pay for if necessary). I found the range of information and decision-making overwhelming (U)
- » Provide experienced support (E)
- » Just keep supplying the TAs with the all of the info and help they need to help the co-ops (E)
- » More ideas of how to get more people involved (E)
- » We are actually conducting discussions about this as our community is not one of being involved. A lot want to pay their rent and be left alone. (E)
- » Have more info on the technicalities. Linda said we would need to talk to a lawyer for more details on business structure and that felt like an obstacle. (E)
- » ...Possibly use some experts to help train in general business practices and management. (E)
- » More involvement and information for food co-ops (E)
- » be more involved in running meetings for the first couple years and educating residents to Board challenges. (E)
- » Legal help (I)
- » 1. Once ready to be formalized we need CDI representative to personally give us information from registration to operation with estimates on expenses and preparation until done. (I)
- » We haven't taken full advantage of CDI, but plan to be in contact again regarding

- our annual “Youth Entrepreneurship Symposium: Exploring Cooperative Solutions” on November 13th. (I)
- » Perhaps some trainings for event planning for fledgling groups. (I)

More contact/check-ins/follow-up / greater staff capacity / greater on-the-ground presence / consistency / systems:

- » Took a little longer than expected to begin a dialogue with CDI after our initial outreach (U)
- » Continued feedback and interaction after the paid consulting period ends (U)
- » Of course, we need more time! In order to really work together, we would need a lot more relationship building and engagement time, and we understand that we need to find resources for that work- both in terms of finding time for everyone to get together in person, and in terms of financial resources. (U)
- » perhaps include some volunteer fieldworkers to expand the reach of the staff (E)
- » In person visits would have been helpful. (E)
- » Offer more contact to other people in CDI... (E)
- » CDI could check back in to see if needs change over time. (E)
- » ...so simply making your assistance available to other groups would be the biggest benefit. (E)
- » We have not had any follow up; I did not know to even expect it or ask. In the start of phase, our questions were answered, but it would have been much more helpful if there had been more detailed instructions and legal and financial information about the choices we were facing. Information seemed unorganized. (I)
- » follow up on progress made

by organisations (I)

- » Stay in touch. (I)
- » more follow-up, monthly coaching... (I)

Positive:

- » The mentor-ship is very hands on and quality time spent. I can't think of any way it could improve! Perfecto! (U)
- » I don't know that they can. (U)
- » Sarah and Jeremiah are doing a great job. (U)
- » Guidance is the key in my opinion. Working with so many different types of personalities can be difficult. Guidance has given us the tools to grow. (E)
- » They are right there when you need them with any type of question or problem (E)
- » Your help has been greatly appreciated!!!... (E)
- » Everything was great for us! (E)
- » We were already happy with the information that we received. (E)
- » Our CDI rep. has already perfected her role as a leadership instructor. (E)
- » I can't think of any ways that the support we receive could improve... (E)
- » not sure there is any improvement they could do (E)

More funding for groups/specific projects:

- » The only improvement I could suggest is for there to be increased funding available to start-ups like ours, so that more organizations can benefit from CDI's expertise. (U)
- » Help us to get grant money for much needed work. (E)
- » Seed grants, formal lending program (E)
- » [Our co-op] is still under capitalized. The [one client] has put a huge burden on my time putting other contracts on hold and at risk. CDI needs to invest in more board

training and write board policy. Not sure how much has been spent on promoting the [client] which is very important, however, the [client] needs far more TA versus what CDI and [our co-op] planned and contracted for. I spend 20- 30 hours a week on this project, there are few days I am not in contact with them including weekends. (E)

- » ...our biggest struggle is being all volunteer and having the time to do what we need/would like to do to move our organization forward (E)
- » help find funding (E)
- » Help with marketing and funding start ups. (I)

More cultural awareness/sensitivity:

- » I never shared my gender identity with CDI and when I receive official correspondences they are addressed to me as Ms. [Name]. I personally am not trans* identified, but there have been cooperative members and prospective members who are. It would be more supportive to us if CDI could address our members by using the names we have given without preceding them with gender signifiers. (U)
- » Tell the truth, stop rushing the residents to buy their park and look residents in the eye when they ask a question and don't skirt around the question's answer. (E)
- » By observing and then "offering" input, instead of offering input when not asked. (E)

More Networking and Learning Opportunities:

- » Getting more resident own communities (members) together to exchange experience and knowledge. (E)

More outreach/visibility/marketing:

- » ...We would like more information about your important work to better inform our member/owners, and also add it to our resources and links page on our website. (E)

Outcome of Collaboration

We asked respondents from collaborative projects "What was the outcome, value or benefit of this collaboration to your organization or your clients?"

Coding their responses by theme, we found the following areas of results:

- » Information/training: 9 comments
- » New co-op/project launch, ongoing co-op support: 9 comments
- » Networking: 4 comments
- » Capacity building: 3 comments
- » Nothing (much) (yet)/TBD: 2 comments

Information/Training:

- » held meeting and workshops
- » Produced report on feasibility of taxi cooperative that was most useful
- » My students are more interested in and knowledgeable of worker-owned businesses, and co-ops in general.
- » Added value to our workshops and educational programs for growers and farmers market managers.
- » Better education
- » The concept for the Peer Mentoring study was timely and generated a lot of interest in the food co-op community. I continue to get requests for our final results and recommendations.
- » We are thrilled with the resources that CDI is bringing to cooperative development in Maine.
- » The main benefit has been support of our curriculum development for Co-op

Academies, which have reached over 14 co-ops and over 75 participants...

- » This collaboration has been an invaluable experience opening up so much lost history...

New co-op/project launch, ongoing co-op support:

- » CDI has brought tremendous value to homeowners seeking to purchase their communities and sellers seeking an efficient sale and market value for their MHC - 19 new ROCs since 2009. CDI's performance has benefited the whole [Network] enterprise, generating over \$51MM in lending and the interest earnings that are generated. CDI has also provided valuable technical advice, training, project management and coaching to ROC boards of directors.
- » ...Even though the participating groups didn't fully take advantage of what CDI offered the academy participants, the feedback they did get was helpful for defining next steps in forming their co-op.
- » -Client security of preserving their home and gaining autonomy. Opens up doors to financing to which other local non-profit housing providers don't have access. -CDI's work aligns with our program's goals and interests in maintaining diverse affordable housing options. And achieves the goal of resident empowerment, building skills.
- » One of the cooperatives ended up falling apart, but this was the best thing that could have happened and the CDI staff worked with our clients to help them to figure this out.
- » In the case of [one co-op], the ultimate outcome was a viable business entity with the necessary support structure to back a significant investment.

- » The coop is official--9 refugee farmers! thanks so much!!
- » As for [one co-op] great project for all and the press releases depict the story well...
- » On-going work with IBEW and Laborers unions on the possibility of an electrical contractor corporation that would be a worker coop.
- » Good partner to help get early stage co-op projects pointed in the right direction. Helped shepherd a number of deals through to financing, which we were able to provide.

Networking:

- » Strengthened overall cooperative movement in Maine.
- » Broadening the cooperative movement.
- » CDI was instrumental in opening the door to the FINE conference. I contacted the cooperatives they suggested for the food hub project and believe that the extension bulletin information was valid upon their review of the documentation.
- » ...and knitting together such a wonderful community.

Capacity building:

- » Capacity building
- » CDI provided guidance, fiscal sponsorship and support as I developed [my organization]
- » We have been awarded grants that we normally wouldn't have access to, we have been able to quickly and legitimately form connections with other groups and have the training support to ensure our success.

Nothing (much) (yet):

- » ...As for the [certain] project still to be determined.
- » Uncertain at this time

Interest in Specific CDI Services

Respondents were asked to check off which CDI services were most of interest. Unlaunched groups mentioned 'Fundraising/Financing' (67%), 'Business Planning' (62%) and 'Preparation of Bylaws' (57%) most frequently, followed by 'Board Training', 'Feasibility Study', 'Strategic Planning', and 'Preparation of Incorporation Documents' (all 48%).

Of medium interest were 'Management Training' (43%), 'Set-up of Accounting Books' (38%), 'Bookkeeping Services and Training' (33%), and 'Co-op to Co-op Networking', 'Preparation of Lease Agreements', 'Meeting Planning and Facilitation', and 'Communications Training' (all at 29%).

Of lower interest was 'Conflict Management Training' (24%), 'Market Research' (19%), 'Market Planning' (14%), and 'Preparation of Marketing Agreements' (10%).

Existing cooperative clients were also most interested in 'Fundraising/Financing' (53%), followed by 'Board Training' (47%) and 'Management Training' (42%), then by 'Co-op to Co-op Networking' and 'Conflict Management Training' (both 39%) and 'Strategic Planning' and 'Communications Training' (both 37%). About a third were interested in 'Bookkeeping Services and Training' (32%), and about a quarter were interested in 'Meeting Planning and Facilitation' (26%) and 'Preparation of By-Laws' (24%).

Of next most interest were 'Business Planning' (18%) and 'Set-up of Accounting Books', 'Preparation of Lease Agreements', 'Market Planning', and 'Preparation of Incorporation Documents' (all at 16%), followed by 'Market Research' (13%) and 'Feasibility Study' (11%). Lowest-ranked was 'Preparation of Marketing Agreements' (5%).

In the inquirers group, services selected as most needed were: 'Bookkeeping Services and Training' (56%) followed by 'Fundraising/Financing' (44%), then 'Set-up of Accounting Books', 'Co-op to Co-op Networking', 'Management Training', and 'Preparation of Incorporation Documents' (each 33%). 'Feasibility Study', 'Market Planning', 'Business Planning', 'Preparation of Bylaws', and 'Conflict Management Training' were of interest to a fifth of respondents (all 22%), and of limited interest were 'Preparation of Lease Agreements', 'Preparation of Marketing Agreements', 'Market Research', 'Meeting Planning and Facilitation', and 'Communications Training' (each 11%). No one responded that they would be interested in 'Strategic Planning' or 'Board Training'.

Respondents had the chance to fill in "Other" on the above question. These included:

- » Research on comparable projects in other areas
- » Training on a collective within the umbrella of a non-profit; ground lease agreements
- » Pre set up advice
- » Under discussion
- » Encouraging residents to take an active role in their cooperative, Creating a capital budget.
- » Legal advice
- » Introduction to services for the beginnings of our work
- » The preparation did not materialize and no one had proposed any of the above. We will

Issues Facing Cooperatives Today

Here are the responses to the open-ended question "What do you see as the most significant challenge affecting the future success of your cooperative or group-based business?"

Coding the responses by theme, respondents perceive the following issues as significantly affecting their cooperatives:

- » Organizational Structure and Development: 15 comments
- » Internal Awareness and Attitudes: 14 comments
- » Profitability/Viability/Revenue/Affordability: 14 comments
- » Funding/Financing/Capital: 10 comments
- » Infrastructure and Construction: 7 comments
- » External Factors: 5 comments
- » Specific: 2 comments
- » Marketing: 1 comments
- » Growth (size, sales, profits, membership): 1 comments
- » Don't Know: 1 comments
- » External Perceptions: 1 comment

The comments in this section show that MHP co-ops in particular are very preoccupied with volunteer engagement, funding, especially for infrastructure, and for those that have not yet purchased their communities, the current owners. Generally, co-ops see a need for proper organizational structures, and member engagement is a top priority. Finding revenue streams to remain viable and profitable, or affordable for members, is also top of mind.

Organizational Structure and Development:

- » A diverse group of people are associated with the leadership of the co-op and many do not understand their place in the operation of the co-op. A clearer understanding of the mechanism of a volunteer organization is what I feel this Co-op needs.
- » Our financial planning instruments need attention...so that we can properly hedge against risks and plan for the future. [Our co-op] does quite well at visioning,

- strategic planning, and financing our project work, but the nature of contract work means we've got to do some thinking about what to do between projects. Market research and bookkeeping are related to that concern; we'd like to know what contracts we can reasonably expect to land and what they'll pay, plus how best to track them in order to later plan.
- » ...affording a general manager
- » Ensuring that the workload we receive is distributed fairly among available editors and that all editors feel that they are being fairly utilized and offered opportunities to train and grow as editors and project managers
- » Attracting and retaining volunteers while avoiding burnout AND/OR becoming financially solvent enough to pay staff
- » Strategic direction, board training and policies...
- » restructuring from ownership by some of the members to a more cooperative structure without loss of mission
- » staying tuned into the skills and capacities of the members to maintain optimal functionality
- » I think that the biggest challenge is cultivating and maintaining a board that is comprised of a good mix of experienced and fresh individuals with the necessary time and energy to carry out the duties and govern in a way that supports operations.
- » ...learning how to get all the laws to become accepted...
- » Making decisions
- » Development of bylaws and incorporation. We are already functioning as a business, the legal structure of the cooperative is what we need to complete.

- » Building management capacity that does not depend on paid staff.
- » Successful management and services.
- » organization of departments

Internal Awareness and Attitudes:

- » Educating potential members about the current situation, its dangers, challenges and opportunities.
- » Generating member-owner sales
- » Building a cooperative mindset among the future owner/employees...
- » Good working relationship with collective members...
- » More residents stepping up to be on the board and volunteering for the cooperative.
- » Getting the Residents to come together as a community...
- » Resident participation
- » The only problem we have is to get help from other members when it comes to projects within the co-op
- » Improvements and involvement in our park
- » Bad decisions by Co-Op members.
- » continued development of interest of members and assistance towards that goal
- » ...Independent retailers are risk...why? they don't know what they don't know. The mission of the [Co-op] is to help independents grow into higher performing enterprises through open and honest collaboration and management assistance, and working or acting together willingly for a common purpose or benefit. Co-operatives are based on the values of self-help, self-responsibility, democracy, equality, equity and solidarity. In the tradition of our founders, we believe in the ethical values of honesty, openness, social responsibility and caring for others.

- » The challenge for us has been resident participation. I now believe we are on the right track to attain volunteers. The last membership meeting was a great success, finally! We offered incentives to all those attending the membership meeting and it worked, we had a full house.
- » Getting residents to participate in joining committees or Board. Avoid us vs. them mentality.

Profitability/Viability/Revenue/Affordability:

- » Residents paying lot rent
- » ...In the same vein, establishing an appropriate revenue stream will matter to our future capacity, which is why I've selected market research and planning above, though they're lesser concerns given the [our] board's skills.
- » Creating a consistent and adequate consumer base...
- » ...and we've long desired a more reliable revenue stream...
- » ...getting enough customers through the door, surviving the winter months...
- » getting 100% occupancy, getting ownership of abandoned homes...
- » growing sales
- » Being profitable
- » Allowing the community to continue to thrive while keeping fees to residents under control.
- » identifying a sustainable business model
- » We are working on re-building our operations to regain financial stability. Hopefully, efforts to re-consider employee coop will be revived once this is successful.
- » ...sustainable business operation
- » Finding buyers who share our values and are willing to support them by paying more (than the lowest commercial price) for higher-

quality, Vermont-grown, organic herbs.

- » Ensuring our financial sustainability.

Funding/Financing/Capital:

- » financing
- » We simply need funding at this point. [Our organization] is poised to be an effective project with broad impact and very few barriers to success short of money...
- » The funds [to upgrade our infrastructure].
- » The challenge will always be keeping rents affordable but more importantly addressing infrastructure needs and finding funding to match those needs.
- » Finances...
- » Grants - we found CDI to be unsuccessful with this topic - we are working with a local group to pursue options
- » Funding our services. Ex Director has provided well over 150,000 to supplement the cost to provide services through the IRSSC. Consultants would not provide that much free time as they tend to want to be paid \$100 plus per hour...
- » ...funding...
- » ...and financing for the new coop.
- » Raising the capital we need to open in a relatively short time frame so our member-owners have a sense of progress.

Infrastructure and Construction:

- » [The funds] to upgrade our infrastructure.
- » The challenge will always be keeping rents affordable but more importantly addressing infrastructure needs and finding funding to match those needs. [duplicate in funding/financing/capital]
- » ...and or replacing the [abandoned homes] that are in need of repair.
- » water and sewer upgrade for the park
- » Our septic systems are in dire need of

emptying, inspecting and repairing.

- » ...fixing the septic, expanding our wooded land.
- » We have a section of the mobile home park we wish to purchase that requires geotechnical engineering to resolve. Just what that will involve is what has brought us to this (dare I hope temporary) standstill.

External Factors:

- » ...developing a reliable supply chain.
- » demographics of our area, how to make our products more affordable
- » Morgan Management, LLC - the owners of our community; and the hopelessly deteriorated condition of the community as a direct result of their gross lack of routine maintenance.
- » the current owner of our MH park
- » Andrew Danforth's ability to convince the owners to sell the property to the co-op at an affordable price.

Specific:

- » Bringing together two communities is really challenging- especially when you layer geographic distance, language differences, and cultural variances into the mix! We're still working on it, but due to developments and expansion of the [Program] we're unable to plan for meetings this summer and have put the project on hold for the time being. Thank you so much for your assistance and all of your input- it has been invaluable to us, and really built our capacity internally in ways in which we hadn't counted on and are really benefiting from.
- » All founding member-owners are low-income parents with additional factors in our lives that make it difficult to

access the time and financial resources necessary to start a business.

Marketing:

- » ...and marketing.

Growth:

- » Not having enough trained workers to serve the demand.

Don't Know:

- » Again - too early to tell.

External Perceptions:

- » lack of interest for the creation of art.
- » lack of interest in gap between rich and poor.
- » lack of interest in volunteer efforts to better the community

Advice to CDI

Our collaborator survey respondents were asked to offer advice to CDI. Their responses are below, coded by theme. Of those who gave advice, the greatest emphasis was on ways to better partner and network, with a good few comments on raising public awareness about co-ops in general and CDI in particular.

This year there were also a several comments encouraging organizational improvements and better communication.

- » Networking/Partnering: 6 comments
- » Outreach/Public Education & Awareness: 4 comments
- » Appreciation: 4 comments
- » Organizational: 2 comments
- » Communications: 2 comments
- » Specific Resources or Services: 1 comment
- » Don't Know/NA: 1 comment
- » Sector/Geographic-Specific: 1 comment

Networking/Partnering

- » Perhaps connect with more organizations

- » not just focused on new economy/co-op work, but whose interests overlap with co-ops? Labor, environmental, etc. You are certainly doing this in some categories with arts, etc. But there's always room to grow. Of course, that's easier said than done.
- » [Co-op] membership has dropped off 15% in less than one year. New RX has taken 65% of sales and 1/3 of cash flow. As for grocery store business conversions to worker coops, I feel our roles need to be more clearly defined. Debriefing should happen to determine how best to mitigate risk forward.
- » I would def. recommend researching and networking with more organizations that can bring more resources to CDI.
- » Create connection opportunities for us. CDI has the 'development' part down to a science, and developing a cooperative is one thing. Adding value to the big picture by helping to create connections between cooperatives is the next step toward a true economy.
- » -There's a well networked system of affordable housing providers and non-profits in Vermont. Keep the dialogue open. Folks are generally open about sharing resources and knowledge of the local landscape--where they have found pitfalls and success...
- » ...Collaboration is so central to cooperative enterprise and a cooperative economy; CDI and [our organization] should explore what's behind the continued resistance to collaboration and develop a vision and a process to get beyond it.

Outreach/Public Education & Awareness

- » ...-Build public understanding of cooperative concept--why it matters, how it works.
- » Get out and do seminars on why or why not to form a cooperative.

- » Inspire philanthropic entities, foundations, etc to view cooperative development as an economic and social development strategy that provides great returns for individuals and communities.
- » More fundraising for more outreach.

Appreciation

- » continue the work
- » Keep up the good work
- » Continue to do the good work that you do.
- » I really liked the way the grants were written so that exploring the option for a cooperative was perhaps more important than actually establishing one. Learning to ask the right questions about cooperative ownership is sometimes the answer to whether or not a cooperative is even a good idea for that entity.

Organizational

- » More language capacity on staff and deeper multi-racial/multi-cultural trust building organizationally / cultural competency training for staff, etc.
- » CDI's leadership needs to address the exponential growth of the organization in the last 5 years and create an organizational structure and culture that can support that growth...

Communications

- » Clarity in communications.
- » We've heard mixed reviews of some of the deeper co-op business services, specifically around marketing plans and business planning. While there's no need for you to specialize in this, maybe being more explicit what you can and can't do would ensure that co-ops are getting the best support available.

Specific resources or services

- » It would be good if there were some practical guides, maybe there are, that could provide working people with the information necessary to start down the road toward creation of cooperatives in the industries in which they work. I am especially thinking about child care where lots of low wage female workers find themselves. They like their work but it is low paying and they are not able to provide parents and children with really top notch care because the programs are designed first and foremost as profit generating enterprises.

Don't Know/NA/General

- » N/A

Sector/Geographic Specific

- » ...-Continue to press for quality capital needs assessments upfront, for quality information to plan for long-term fixes and long term financial health...

Additional Comments

- » Inquiry respondents were asked if they had any additional comments. The responses are below.
- » Thank you for all of the great help.
- » We need to fulfill our goal and meet CDI
- » Thank for the speedy response to our enquiry.
- » Thank you!
- » CDI helped us in the pre-incorporation phase. We should continue to seek out support.