

Cooperative Assessment

The purpose of this self-assessment tool is to help you and your group cultivate a sense of your capacities and needs in terms of training, development, and starting up your cooperative. By answering the checklists, fill in the blanks, and short questions, you will come to a better understanding of what you know, what information you may still need to determine, and how you might start seeking out solutions.

Assessment Questions:

1. I _____ understand cooperatives, cooperative history, and the current cooperative landscape:

Fully Mostly Generally Somewhat Barely

Briefly, what do you feel you understand the most about cooperatives?

Briefly, what are some of the top questions you have about cooperatives? How might you go about finding the answers to these questions?

2. My cooperative's sector/membership structure is:

Worker Consumer Producer Housing Hybrid

Other: _____ Not Sure

A) Why does this sector/membership structure make the most sense for your co-op?

B) How does it benefit the membership?

C) Is there any reason to consider a different sector/membership structure? (Or, if you're not sure which sector/membership category you fall under, how can you begin to find out?)

A) _____

B) _____

C) _____

3. I have _____ identified how my co-op will serve its membership, as well as the roles and responsibilities of the members:

Completely Mostly Generally Roughly Barely

Briefly, how will the co-op serve its members, and what roles will the members play in the co-op? What remains unclear in terms of membership responsibilities/roles?

4. I feel as if the general concept of my co-op is:

Completely clear Defined Getting There An Outline Uncertain

When you imagine your cooperative, what is the clearest aspect? And/or what do you feel confident about?

When you imagine your cooperative, what seems the most uncertain? And/or what questions/concerns do you have about your co-op?

5. I _____ comprehend what the primary function of my co-op will be – what products it is selling, distributing, or manufacturing; what services it is rendering; etc.:

Fully Mostly Generally Somewhat Barely

In a short pitch (three to four sentences), describe the primary function and/or purpose of your cooperative:

6. I _____ know what the mission of my cooperative is:

Fully Mostly Generally Somewhat Barely

Briefly describe your co-op's mission:

7. What industry will your co-op be operating in?: _____

What is a brief description of and outlook for your industry?:

8. I ____ understand who constitutes my primary market:

Fully Mostly Generally Somewhat Barely

How do you know who your market is? How have you identified them?

9. I have _____ identified what kind of demand exists for my products/services within my market:

Fully Mostly Generally Somewhat Barely

How have you identified the demand within your market? What questions remain for you in regards to this? If you haven't identified demand within your market, how might you begin? Who might you ask to figure out where to start?

10. I am _____ aware of what distribution and marketing channels I will utilize to move my co-op's products/services to my primary market:

Fully Mostly Generally Somewhat Barely

What methods will you utilize? Are these tested and evaluated methods? How do you know they will work?

11. I have identified and contacted potential founding members for my co-op:

Yes - we're all set In communication with potential members Just starting to contact Not at all

What role will these founding members play in beginning the cooperative?:

12. My co-op has developed clear goals for retaining membership and limiting member turnover:

Completely True Mostly True Somewhat True Not at all

Why is membership retention important for your co-op? What does your co-op plan to do to maintain membership?

13. I am _____ aware of how much start-up capital I will realistically need to found my co-op:

Fully Mostly Generally Somewhat Barely

How do you plan to go about acquiring this start-up capital? If you don't know the amount of start-up capital you'll need, how might you begin finding out?

14. I have _____ identified my cooperative's first year goals:

Fully Mostly Generally Somewhat Barely

What are your co-op's first year goals? Why are these important to fulfilling your co-op's mission, business operations, and dedication to serving the membership?

15. I have _____ identified my co-op's first year financial projections, including what we will need to make in order to break even, survive, or thrive:

Fully Mostly Generally Somewhat Barely

Most businesses do not make a surplus in their first year. Do you have a contingency plan for this possibility? Do you have an idea in regards to how you will distribute funds in the case that you do make a surplus in the first year?:

16. My co-op group has a strong conflict resolution process, and we understand the importance conflict resolution plays in maintaining a healthy, successful cooperative – and a happy membership:

Completely True Mostly True Somewhat True Not at all

Why is an established conflict resolution process an important part of maintaining your cooperative? What does your co-op group need to do to create such a process?

17. I have _____ considered the advantages and disadvantages the co-op model presents in terms of organizational structure, marketing, community outreach, membership benefits, and dealing with financial issues:

Fully Mostly Generally Somewhat Barely

What are some of these advantages and disadvantages?

Advantages: _____

Disadvantages: _____

18. I am aware of practitioners of my cooperative sector who I could meet with to discuss establishing my cooperative and other various questions I have:

Yes No Maybe

Who do you know in your cooperative sector that you could potentially meet with? What would you want to discuss with them? If you don't know of anyone or any cooperatives, who might you speak with to help you determine individuals or groups that you could get in touch with?

19. My cooperative will be _____ dedicated to fostering relationships with other co-ops and/or building the cooperative economy:

Completely In large part Somewhat Minimally Not at all I do not understand what "the cooperative economy" means.

Why or why not is it important for your co-op to work with other co-ops and/or strive to build the cooperative economy? Or, if you don't understand the term "the cooperative economy," how might you begin investigating its meaning?

20. Going forward, I feel:

Completely Confident Pretty Good Okay Could be better Nervous/uncertain

Why do you feel this way? What challenges might you have to face and what advantages do you have going for your co-op?

Checklist:

Please use your best judgment to indicate your level of knowledge about the following subjects and issues. Circle one (1) to indicate "I know very little" up to four (4) to indicate "I know quite a bit."

1. The seven cooperative principles and cooperative legal structures

1 2 3 4

2. History and examples of coops, either domestic or in other countries

1 2 3 4

3. How to develop a "work plan" to get the planning process underway

1 2 3 4

4. How to create a database of interested stakeholders

1 2 3 4

5. How to facilitate meetings

1 2 3 4

6. How to ensure accountability between meetings

1 2 3 4

7. How to ensure transparency in record keeping

1 2 3 4

8. Democratic decision-making methods and processes

1 2 3 4

9. Where to obtain funds for planning

1 2 3 4

10. How to determine a business idea's feasibility

1 2 3 4

11. How to construct a business plan

1 2 3 4

12. How to incorporate our cooperative

1 2 3 4

13. How to write bylaws, and what goes into them

1 2 3 4

14. What financial documents are necessary for start up

1 2 3 4

15. What financial software and reports are necessary for operation

1 2 3 4

16. Where to obtain funding for operations

1 2 3 4

17. How income will be allocated

1 2 3 4

18. Marketing and communications: how to best get the word out about our co-op

1 2 3 4

19. How to engage members in the life of the co-op

1 2 3 4

20. Long-term growth and planning of the co-op

1 2 3 4