

Co-operative Performance Index – Update July, 2018

In May 2018, the project participants met at Arctic Co-op in Winnipeg to review the indicators and identify changes and modification. During the next few months, the participants will work with the indicators and metrics. The following is a listing of the current indicators and metrics.

Principle One: Voluntary and Open Membership

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

Principle Two: Democratic Control

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

Principle Three: Member Economic Participation

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

Principle Four: Autonomy and Independence

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

Principle Five: Education, Training and Information

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

Principle Six: Co-operation among co-operatives

| Indicator | Metric |
|--|---|
| Collaboration with other co-operatives le research, partnerships, joint projects, community projects, secondment, transfer, advice, new co-op dev | What is the # of co-ops your co-op collaborates with? Provide range Point system |

| | |
|--|--|
| Business done with other co-operatives | <p>Does your co-op have a policy to procure from co-operatives? Yes/no</p> <p>What is the # of co-ops your co-op does business with as a client?</p> <p>Provide range</p> <p>What is the # of co-ops your co-op does business with as a supplier?</p> <p>Provide range</p> |
|--|--|

Principle Seven: Concern for community

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