

LEADer

A publication designed to promote visionary and forward-thinking discussions between and among NCGA's Western Corridor co-op leadership



Focus on Member Linkage

A Study Guide for Co-op Leaders



Inside This Issue:

A New Approach—*BEST* Cover

Who's Minding the Members?
—*Phil Buri* Page 3

Taking a Deeper Look at Member Linkage
—*Marcia Shaw with Cindy Owings* Page 5

Ask the BEST: Who Takes the Lead in Member Linkage?
—*BEST* Page 8

For More Information—Page 9



STUDY GUIDE SECTION—

Member Linkage: Break It Down, Add It Up, Dive into the Swirl
—*Martha Whitman and Cindy Owings* Page SG1

A New Approach

With this issue of the *LEADer*, we reshape our quarterly publication into a study tool and discussion guide for co-op leaders. We received feedback that our first four issues, spanning the past year, were meaty and interesting, but it was hard for directors to use the information provided.

In addition, we want to challenge boards to be more forward looking and to think more about how to *shape* their co-op's short- and long-term directions. We hope the *LEADer's* new format better serves to spark discussion and thinking beyond your immediate agenda items. We want the *LEADer* to be a resource that a board can read together and discuss at board meetings. We'd like to see the *LEADer* inspire wider-ranging, more strategic conversations for top co-op leaders (including general managers and maybe top staff).

Starting with this issue, the *LEADer* will include two or three "thought" pieces—articles to inspire and challenge your thinking on a topic of interest or relevance, as well as additional resources for further research and review. We will also provide a study guide on the topic. This guide will consist of a series of questions or activities to help you learn more about how your co-op currently performs in the topic area, as well as big-picture questions for your board to discuss.

We suggest you use the *LEADer* as follows:

1. Agree to use the *LEADer* to shape board discussions and consideration of key issues.
2. Decide when the board will devote time to its discussions. Can you set aside 45 to 60 minutes per quarter to talk about the articles and discussion questions? Could you discuss big-picture

Meet the BEST in the West



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LEADer

A publication focused on sharing ideas to improve on and support excellent cooperative governance for NCGA's Western Corridor co-ops

A New Approach Continued from Page 1

questions at your board retreat or set aside 15 to 20 minutes of each board meeting to discuss the topics? Do whatever your board finds workable to spark further thought, research, and discussion beyond your imminent agenda items.

3. Also consider: Are there others in your community whom you might bring into the board's discussion session? Others who would be good resources to help shape your understanding or consideration of the topic?
4. Agree that all directors will review the materials provided in the *LEADer* in advance of the designated board meeting or discussion session.
5. Have one director take responsibility for preparing and guiding the discussion.

Finally, we would like you to send feedback on your experiences. Send us notes from your discussions if possible. How did this approach work? What would make this process more useful? What topics would you like us to include in future issues of the *LEADer*?

More about the *LEADer*

- The *LEADer* is published quarterly and is distributed to enrolled directors and leaders of Western Corridor co-ops.
- We welcome your reactions, suggestions, and contributions, as well as questions for us to answer in future issues. Send comments or questions to askthebest@ncga.coop.
- The next issue will be available in late 2009–early 2010.
- You can find information about the LEAD program and an online enrollment form at <http://www.cgin.coop/leader>.
- For more information about the NCGA, the Western Corridor, upcoming western regional board training events, or the *LEADer*, or for contact information for any BEST members, contact:



Board Effectiveness Support Team

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A 3D orange stick figure stands in the center, holding a large, heavy metal chain that extends across the top of the page. The figure is rendered in a simple, rounded style. The chain is made of large, interlocking links and has a metallic sheen. The background is a light, textured surface.

Who's

Minding the Members?

By Philip Buri

Engaging with members would be much easier if there were a manual. For every issue regarding the membership, the manual would tell us what to do and, as important, who should do it. And there would be pictures and even a helpful YouTube video.

But no manual exists. Each board, general manager, and staff member must figure out who has responsibility for engaging with the members and how to do it. Although no single statement answers the question “Who’s minding the members?” this article suggests an approach that may help your co-op figure out an appropriate response. The answer comes down to three areas: (1) the core member relations responsibilities of the general manager (and staff); (2) the core member relations responsibilities of the board; and (3) agreements between the GM and board in the broad area of overlap.

The General Manager’s Core Responsibilities

Let’s begin with the general manager’s core responsibilities for engaging members. These responsibilities are operational (duh!) and fall where the GM and staff have primary, if not exclusive, authority. In general, they are:

- Soliciting and responding to customer comments and complaints
- Gathering information about the membership, including member counts, mailing lists, and general demographics
- Taking care of the logistics for member meetings—setting up, taking down, and all the heavy lifting in between

- In-store issues that affect members—from store layout to product selection and pricing
- And, generally, all issues that involve members as customers as opposed to members as owners

This is not an exhaustive list, and I hope you will identify more specific responsibilities that belong here. The general idea is that when the co-op needs to engage with members about operations, the general manager has the primary responsibility. The board treads on thin ice if it usurps this responsibility from the general manager.

The Board’s Core Responsibilities

The board has primary responsibility for dealing with members as owners. In contrast to the general manager, the board engages with members at the level of community. What difference do we want our co-op

Continued on Page 4

Who's Minding the Members?

Continued from Page 3

to make in the world? In general, the board deals with members on issues outside the store's operations. Here are examples of the board's core responsibilities:

- Holding an annual meeting of members (although the staff can have responsibility for logistics)
- Issues of governance—nominations, voting, membership meetings, committees
- Defining the co-op's mission, values, or ends
- Defining the co-op's role in the larger community. What does the co-op stand for?

Again, this is not an exhaustive list. But it describes the core areas of the board's responsibility. If the general manager strays into these areas, he or she undercuts the board's authority and connection with the membership.

The Great Land of Overlap

The problems with member engagement usually pop up in the broad area of overlapping responsibility—areas where neither the board nor the GM has exclusive authority and both have something important to contribute. The two areas of overlap that seem to cause the

most trouble are educational programs for members and weighing member comments.

The first area—educational programs—usually suffers from too many good intentions. The marketing or outreach coordinator wants classes that feature co-op products and services and boost sales. The board's Member Affairs Committee wants classes that reinforce the cultural and political significance of co-ops in society. Both approaches are important, but rarely is there enough classroom space, member interest, or resources (budget or staff) to satisfy both the board and management. This is an inherent source of friction rather than a sign of dysfunction. And resolution requires compromise rather than excluding board or management from the process.

The second area—weighing member comments—requires that both the board and GM

decide what members really want. There are countless ways to survey members' wishes, but gathering information is only half the work. The other half demands insight, experience, and judgment. Neither the board nor management has a monopoly on these qualities. Instead, both must use their best judgment to act for the co-op and its membership.

So the answer to the question "Who's minding the membership?" is: "We all are." Some membership issues fall to the board; some to the GM. But many, and often the most complicated, fall to both board and management. Rather than fight for the responsibility, a healthy co-op shares the fundamental task of acting in the membership's best interest.





Taking a Deeper Look at Member Linkage

By Marcia Shaw
with Cindy Owings

The heartbeat of a co-op is its shoppers. Daily, co-op staff members interact with this spirited community. How can a co-op's board connect to shoppers, members, and staff? How does a board "keep its ear to the ground" to sense the tenor of member needs?

Most boards try multiple ways of reaching co-op members. A proactive board is more likely to reach a greater number of members. The complication is finding out if member outreach is actually working.

Newsletters, used by most co-ops, are an effective way to reach many members. Through newsletters, boards can address issues facing the co-op, deal with controversial issues by presenting the pros and cons, and educate members on timely topics. Is your co-op considering an expansion? Does your co-op want to revamp

its purchasing policies? Are co-op members demanding a patronage rebate? The newsletter provides a platform from which board members can explain the decision-making process.

One co-op board that regularly dines together initiated a plan to invite 10 to 12 randomly selected members to join the dinner hour. Side by side, directors and members participated in an exploration of the board's chosen topic. Invited dinner guests listened, dialogued, and commented on the evening's topic while expressing appreciation for the co-op, its programs, and its board.

"Breakfast with the Board" has been a successful event at other co-ops. Food and an informal atmosphere create a festive occasion where lots of ideas can be generated. Once members have met directors in a casual situation, the future communication door is more easily opened.

Who Answers the Questions about Chickens?

"Are our co-op's chickens free of additives? Why is our co-op selling chickens anyway? Don't we have a policy about purchasing meat? I thought we didn't offer meat or fish?" asked a co-op member. How would your board answer this member?

First, a board must define what kinds of questions are operational (dealt with by staff and management) and what are questions of policy (dealt with by the board). In answer to the chicken questions, the general manager would address the part about additives. The board would entertain the purchasing policy question.

More often than not, members have no idea about the separation of purview between a board and staff/management. It is the responsibility of the board to respond to the queries of members and know the difference between operational and policy questions. An unhappy and questioning member provides an opportunity for a board to define for itself, as well as for the

Continued on Page 6



Taking a Deeper Look

Continued from Page 5

member, the difference between operational and policy issues.

It is the responsibility of each board member to know how to answer the chicken questions. Use informative role playing at your next board retreat to train board members in respectfully answering such questions. You can also answer members' sticky questions with newsletter articles that illustrate the differences between operations and policy issues.

Member Connection Strategies

In the array of strategies for linking with members, make sure the board employs some activities that are push oriented—in which the board puts out information it wants members to know—and some that are pull oriented—which allow members to generate the topics. Create a calendar of board linkage events to see where the push/pull opportunities occur. Are these strategies working and how

will the board know? Does the linkage event or process meet the board's goals? Creating an event for linkage without having defined what the board hopes to accomplish puts the proverbial cart before the cyclist.

If the board is serious about capturing the gist of member needs, it must carry out a professional survey to collect actual data. An effective survey must stratify responses, use a statistically significant random sample, and include well-designed questions that elicit clear responses. With measurable data, a board can avoid disagreement about what individual board members “think” members want.

A well-designed survey allows a board to make generalizations that *do* represent the whole membership. If a board simply asks members for general feedback, the responses could span everything from “Where are the bike racks?” to “I don't like broccoli.” Employ professional assistance in designing a survey,

building around a clear idea of what the board will do with the results.

How about the co-op's annual meeting? If your board has planned a raucous party with beer and dance music, don't expect a lot of thoughtful discussion on the politics of food. If the co-op is navigating a controversial decision, the annual meeting might include guided discussions on both sides of the issue.

It's not easy for boards to measure the success of an activity, especially involving a diverse group such as co-op members. Sometimes, simply asking whether an event worked in meeting its goals is the best way to start. After the board has that discussion, a smaller group might think about how to make observations more rigorous.

One board set up flip chart stands at the entrance to the co-op and asked people to comment on a planned expansion. The charts elicited a wide variety of responses. A member with

Continued on Page 7

Things You're Already Doing...

The good news about member linkage is that you're probably already doing lots of it. All those casual conversations with friends and neighbors (who are members) about your board work count as member linkage. When you pause to listen to comments about the many local products on the co-op's shelves, you're linking with members. Are you currently having conversations with acquaintances who might want to run for the board? That's member linkage too.

Remember that the board should speak in one voice and that linking means listening as well as talking. Every time you listen, you're engaged in member linkage. Congratulations on a job well done.



Continued from Page 6

data analysis skills analyzed the responses. The collected comments were distilled into eight broad categories that later were included in a formal questionnaire. One outcome was that the board discovered it needed to communicate more effectively about how financing would work. Even

though the board understood the financing issue, it had failed to communicate this understanding to the membership.

Keep It Fresh!

The last notion to bring into your discussions of member linkage is that even successful events might need to evolve or change from year to year. For example, if the board traditionally has a big party for the annual meeting, it may be missing the folks who don't do big parties. Is there another event that works better for nonpartiers? Do planned events bring the same dedicated folks every time? Does your co-op have a linkage option that works for young families with kids in

tow? Stratified thinking about membership helps attract diverse members. If your board never hears from the 20-somethings in your town, recruit a board member from that age segment to access new ideas pertaining to the younger crowd.

Member linkage is an important part of the board's job, and doing a good job means there won't be any nasty surprises when the board makes a decision. It will be aligned with member needs and congruent with member values. Staying in touch with members is the part of the job that makes representative democracy work for the co-op.

Engage Those Members!

What do you say to friends and neighbors when they ask you about your co-op?

Board: Hey. Hi. Aren't you a member of the co-op?

Max(ine) Member: Who me? Yes, I'm a member...have been for quite some time.

Board: Yeah. I want to talk to you about what's going on here and what the board is thinking of doing in the future.

Max(ine) Member: Why do you want to talk about that? I thought we elected you folks to take care of all the heavy thinking and planning (ha ha). I'm happy with the co-op. The store carries most of the things I want, and shopping is a pleasant experience—what else could I want?

Board: I'm glad you're a happy shopper, but what about as a member of the co-op? Are there things you think we ought to be doing

Max(ine) Member: Huh? Oh, that. Well, I guess I haven't been to many owner meetings lately. You know how it is... life gets busy and...

Board: Do you read the co-op newsletter? Come to the store when the board is there? Have you ever been to Breakfast with the Board? Should the co-op take on a study of food security in our area?

Max(ine) Member: Come to think of it, I did read in the newspaper that a new natural foods store is coming to town. I was hoping that we were prepared for the competition. And I would like to know more about "eating locally." My new neighbor asked me if our co-op provided recycling opportunities. I didn't know much about it... I suppose it would be helpful if I could learn more. Say, when are the board members in the store?



Board Effectiveness Support Team

Who Takes the Lead in Member Linkage?

Dear West BEST:

If a co-op has had a weak board, and the GM has stepped up to the plate and taken the lead in member linkage, how does a stronger board take back responsibility for that without offending the GM or staff? —Anonymous

Dear Anonymous:

This is never going to be an easy situation. We suggest you start with job descriptions (including a clear position description for the board). If that doesn't provide clarity about who will do what (and a springboard

for a discussion about changing the way things happen), it at least will be a good place to start.

If the GM is actually the primary driver of all member linkage activities and has been for a long time, you'll need a good conversation about

what needs to change. In our experience, most GMs would jump at the opportunity to give member linkage responsibilities back to the board. It's great to have a GM who wants to maintain member linkage opportunities, but managers also have a store to run.

How do you make a change without offending the GM or staff? Communication. Get all parties at the table to develop a workable solution. Include the staff or GM in the process. Be clear about roles and the co-op's goals in terms of member linkage. If everyone's willing to listen and let improving member linkage be the overriding goal, you'll find a successful resolution for positive change.

What Do You Think? We'd love to get your ideas: articles, questions, thoughts, reactions, and comments. Have a great article from your co-op's newsletter? Tried a new idea to improve your planning process, recruit new directors, or improve board/management relations? Send your ideas, and we'll include them in future issues. Or send a question for the BEST to answer in a future issue (askthebest@ncga.coop). If we print it, we'll include your name or make your question anonymous, as you prefer or indicate.



Next Issue:

Focus on Board Retreats

Our next issue will come out in late December/early January. The topic will be "How to Hold a Great Board Retreat." Send us your thoughts and feedback: Who plans your board retreat? Who attends? How do you organize the time? How do attendees prepare? We would also love to get photos from recent board retreats—especially those that illustrate your board working on a specific topic or having fun.

We'll award a complimentary 2010 LEADER subscription to one co-op that provides materials from a recent retreat. Send your feedback and photos to askthebest@ncga.coop or contact Karen Zimelman (kz@ncga.coop).

Check It Out!

For More Information

Here are additional resources that might be useful in thinking about member linkage:

Our first issue of the *LEADER* (fall 2008) included a variety of articles about member linkage. That issue also includes a listing of other resources on the topic. Find it online at <http://www.cgin.coop/leader>.

Learn about creating member surveys at http://www.foodcoop500.coop/uploadedFiles/Home/Content_Items/Microsoft%20Word%20-%20Survey%20FAQ%202010-07.pdf.

Check out a blog for co-op members at <http://www.midcounties.coop/forums/default.aspx>.

A few articles of potential interest:

“A Member Linkage Tool That Builds Policy and Action,” by Karen Zimbelman
(*Cooperative Grocer*, January–February 2001)
<http://www.cooperativegrocer.coop/articles/index.php?id=338>

“Keep the Co-op Candle Burning,” by James Wadsworth (USDA Rural Business-Cooperative Service)
<http://www.macc.coop/KeeptheCo.pdf>



The *LEADER* Is Online

This issue and all back issues of the *LEADER* are available online at <http://www.cgin.coop/leader>. You'll need to log in to the CGIN site. Then enter your co-op's *LEADER* access code. Check with your co-op's NCGA-designated representative for details if needed

Let Us Know. . . if or when you have new directors, or if any directors no longer want to receive the *LEADER*. Send names to be removed and the full names and e-mail addresses of those to add to Karen Zimbelman at [kz@ncga.coop](mailto: kz@ncga.coop).



MEMBER LINKAGE

A LEADER STUDY GUIDE



We hope the following activities prove useful in your board's discussions and planning about member linkage.

By Martha Whitman
and Cindy Owings

BREAK IT DOWN, ADD IT UP, DIVE INTO THE SWIRL

Co-op board members frequently express concern about the conundrum of member linkage. Since it's impossible for each board member to talk to every co-op member, how is a board to know it is truly representing the members?

Keep in mind, your job is not to know what every single member thinks about one specific issue or another. As a member's representative, it's your job to understand the abilities of your co-op, grasp current trends, ensure financial viability, and, last but not least, formulate the co-op's mission. You will need member feedback to inject member values into the co-op's mission, and you will need to keep telling your members what the heck you're up to.

Rather than fretting about whether you're doing a good enough job, make a plan and break it down into manageable pieces. Your board is probably already doing more member linkage than you realize. So a good place to start is to list all the ways you already connect with your membership. What is the "push and pull" of your board's communication with the membership? The activities suggested below should help you determine your strengths, weaknesses, and opportunities.

As you review what your co-op is currently doing, consider taking a longer view in planning these programs. Be creative and plan beyond a year. The adage applies—you can't please everyone all the time. But if you consider the target audience for each activity and what style of engagement each activity involves, you'll have a better chance of knowing the range of views, needs, and expectations held by your co-op's diverse membership. When planning your annual meeting, for instance, consider different themes or approaches each year to address different members.

M E M B E R L I N K A G E

A L E A D e r S T U D Y G U I D E

NOTES:

Use the following activities in your discussions and planning about member linkage:

- 1. Ready, set, go!** First, decide who is going to do the work. While the whole board should agree to the project, a lot of groundwork can be accomplished ahead of time. Perhaps a committee already exists. Or create an ad hoc committee to do the suggested activities. The committee will be well served if the staff member generally involved in member relations (the one who organizes the annual meeting, edits the newsletter, etc.) participates in the committee work.
- 2. Member linkage activities.** List the various ways your board connects with members throughout the year. As you list the member connections, note how frequently each activity occurs. Monthly? Quarterly? Annually? See the sample worksheet on page 4 of this study guide.
- 3. Categorizing your activities.** Add three columns to your list. Label the first column “push” (the board puts out information to members), the second “pull” (members share their thinking with the board), and the third “push/pull” (members and the board communicate simultaneously). Are there activities in each column? Charting by these criteria can be illuminating, particularly if one column shows up blank. If so, perhaps it’s time to institute a regular board column in the newsletter, create an annual member survey, or invite a keynote speaker to the annual meeting.

M E M B E R L I N K A G E

A L E A D E R S T U D Y G U I D E

DISCUSS:

- Q:** *What groups of members are you currently not reaching?*
- Q:** *Do young adults feel their opinions matter and do elders know you still want and need them?*
- Q:** *How frequently are your member engagement events and activities occurring?*

- 4. Who's covered and who's not?** If you have information from a recent survey, get a list of the major demographic groups currently shopping at your co-op. (If you don't have recent survey information, use standard categories such as young singles, young families, seniors, etc.) As you review your chart of member linkage activities, consider which demographic group each activity involves, appeals to, or works for. Some members will want to hold a newsletter while others will gravitate to the co-op's website or blog. Working parents might not consider a weekday evening meeting but would jump at the chance to attend a weekend annual meeting that has entertainment for children. Discuss the questions at left.
- 5. To what end?** Now it's time for the committee to come back to the board with a written report. It should bring everyone up to speed and allow for a dynamic group discussion. What are your goals with these activities? Are you planning on an expansion? Do you want to create as transparent a process as possible? Do you want to create opportunities for members to come together and celebrate their co-op? Does your co-op have an overall goal related to member linkage? Do you have specific goals for individual events or programs? The better you are able to articulate your goals, the more you will know which activities are needed.
- 6. Keep it going.** Congratulations! You now have a game plan. Now it's time to expand your plan to designate who is going to do what, and when. Clarify what will be the responsibility of the board, and what will management cover? Remember, member linkage is an ongoing endeavor. It's also a wonderful opportunity to think about what it means to be a co-op and have a lot of fun along the way.

MEMBER LINKAGE

A LEADER STUDY GUIDE

List the various ways your board connects with members throughout the year. Note how frequently each activity occurs: Monthly? Quarterly? Annually? Next, categorize your activities. The “push” column is for information that the board puts out to members. The “pull” column is for information that members share with the board. “Push/pull” is for simultaneous communication between board and members.

	Ways we connect with our members? How often?	Who	Push	Pull	Push/Pull	Goal or Target
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						