5th Annual Cooperative Development Foundation

Cooperative Issues Forum
Sponsored by the Ralph K. Morris Foundation

National Press Club
Washington, DC
May 6, 2015
1:30 – 5:00 pm

Agenda

1:30 - 1:40 pm  Welcome and Introduction

   Gap Kovach, Chair
   Cooperative Development Foundation

1:40 - 3:15 pm  Replicating Success in Cooperative Development

   Moderator:
   Dennis Johnson
   President, Cooperative Housing Resources, LLC.,
   Shoreview, MN

   Panelists:
   Kevin Edberg
   Executive Director, Cooperative Development Services
   St. Paul, MN

   Hilary Abell
   Co-Founder, Project Equity
   Oakland, CA

3:15 - 3:45 pm  Break

3:45 - 5:00 pm  Hall of Fame Inductees Forum

   Moderator:
   Mike Beall
   President & CEO, NCBA CLUSA
   Washington, DC

   Panelists:
   Dr. Ann Hoyt
   Professor Emeritus,
   University of Wisconsin – Madison
   Madison, WI

   Daniel Kelley
   Former Board Chair & President,
   GROWMARK, Inc.
   Bloomington, IL

   William Nelson
   President, CHS Foundation &
   Vice President of Corporate Citizenship, CHS Inc.
   Inver Grove Heights, MN

   Judy Ziewacz
   Cooperative Innovator
   Monona, WI

5th Annual Cooperative Development Foundation
The Cooperative Development Foundation promotes self-help and mutual aid in community, economic, and social development through cooperative enterprises. CDF administers a family of funds that provides grants to further cooperative development and innovation. The Foundation also engages in educational programming that both enables networking among cooperative development practitioners and raises awareness about cooperatives in the public policy arena.

**Special Project:** Since 2011, CDF has worked to strengthen, support and develop home care cooperatives and housing cooperatives to meet the needs of rural seniors, through a Rural Cooperative Development Grant.

**Funds Administered by CDF**

- **MSC Fund:** supports meeting the needs of rural seniors through cooperative enterprises
- **Howard Bowers Fund:** Supports education, promotion and development of food cooperatives
- **Shirley K. Sullivan Fund:** Provides educational funding for cooperative communicators
- **Co-op Emergency Fund:** Supports cooperatives disrupted by disasters
- **Revolving Fund:** Provides revolving loans for development of senior cooperative housing
- **Kagawa Fund:** Provides revolving loans for purchase and rehabilitation of student cooperative housing
- **Jim Jones Fund:** Supports the participation of emerging leaders in cooperative education programs
- **Cooperative Innovation Fund:** Promotes cooperative development for people with limited resources, domestically and internationally.

For more information about CDF:  www.cdf.coop

For more information about CDF’s work with rural home care and senior housing: www.seniors.coop
CDF Thanks the Ralph K. Morris Foundation
For Sponsoring the
5th Annual Cooperative Issues Forum

The Ralph K. Morris Foundation supports the development of future cooperative leaders and sponsors programming that advances forward thinking, research, education and outreach in cooperative business, development, wise rural land use and leadership. The foundation was established in 2001 to perpetuate the memory of Ralph Morris and the contributions to rural America and the cooperative movement that he made during his legal career.

Foundation Programs Include:

The Cooperative Leadership Fund established in 2001 to provide financial support to help cover costs associated with training, professional development and educational programs for emerging leaders interested in the future of cooperatives and rural communities.

The Elroy Webster Cooperative Studies Fund provides financial support to graduate and law school students enrolled in an agricultural cooperative program or that can demonstrate how their field of study would relate to or benefit the agricultural cooperative industry.

The Rod Nilsestuen Legacy Event provides an opportunity for cooperators to come together for in-depth, thought provoking presentations on issues affecting cooperatives, conservation and leadership development.

For more information on the Ralph K. Morris Foundation, visit: www.ralphkmorrisfoundation.org.
**Speaker Biographies**

**Dennis A. Johnson** is partner and president of Cooperative Housing Resources, LLC, a lender and consultant specializing in the development and finance of senior housing cooperatives; board chair of the Senior Cooperative Foundation whose mission is to promote the development and operation of successful senior housing cooperatives; and executive vice president of SCH Purchasing Cooperative operating to help senior housing cooperatives and their members obtain greater purchasing power in the marketplace and otherwise further their common business interests. He is an experienced executive with strong skills in finance, credit, and business development. Through domestic and international experience he has outstanding business acumen and leadership abilities.

He has a career devoted to cooperative organization and finance, including:

- Local and national positions with the Farm Credit System, including President and CEO of the St. Paul Bank for Cooperatives
- Organizer and Chairman of Homestead Housing Center, the developer of 17 rural senior housing cooperatives
- Organizer of the first senior cooperative housing conference and senior cooperative housing network
- Developer and coordinator of the senior cooperative housing education program
- Organizer of SCH Purchasing Cooperative
- Founder and board member of Senior Cooperative Foundation
- Recipient of Cooperative Leadership Award from Minnesota Association of Cooperatives

He received a Bachelor of Agricultural Business Administration from the University of Minnesota in 1971 and a Master’s Degree in Agricultural Economics in 1973. In May 1996, he received the Outstanding Alumni Award from the University of Minnesota’s Department of Applied Economics.

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**Kevin Edberg** is the executive director of Cooperative Development Services (CDS), a position he has held since October 2000, where he is responsible for the strategic direction and management of the organization, in addition to select program work. CDS is a 30 year old non-profit organization created by the cooperative communities of Wisconsin, Minnesota and Iowa. Its mission is to create a cooperative economy in the Upper Midwest, and CDS achieves its mission by helping groups organize new cooperative businesses; by providing business development assistance to existing cooperatives; and by supporting the creation of effective cooperative development capacity through partnerships with other development organizations. CDS has made significant contributions to the development of agricultural cooperatives, food cooperatives, and senior housing cooperatives.

Prior to coming to CDS in October 2000, Kevin spent 13 years with the Minnesota Department of Agriculture where he successfully developed programs in farm direct marketing and local foods promotion; producer-owned value-added processing; organic agriculture, and international marketing of food and agricultural products. During this time, the policy, market, and cooperative development work creating Minnesota’s ethanol industry was also carried out by staff under his supervision. He holds bachelors degrees in Agricultural Economics and Horticulture, in Secondary Science Education, and
completed graduate work in Plant Physiology and Plant Breeding, all at the University of Minnesota. Kevin believes passionately in the ability of people to address important personal and community issues through cooperative action. He has provided leadership to a number of boards in the non-profit, cooperative and public sectors, including CooperationWorks; the MSC Fund of the Cooperative Development Foundation; Food Alliance; and 25 years of elected service on the school board and city council of his home town of White Bear Lake, Minnesota.

Hilary Abell is co-founder of Project Equity, a San Francisco Bay Area nonprofit that builds economic resiliency in low-income communities by demonstrating and replicating strategies that increase worker ownership. Since its formal launch in 2014, Project Equity has spearheaded the “Bay Area Blueprint,” engaging diverse stakeholders and mapping out an action plan for coop development across multiple pathways; co-created the Bay Area Worker Coop Academy, together with two partner organizations; and launched an initiative to encourage and support conversion of successful businesses into worker-owned cooperatives.

Prior to co-founding Project Equity, Hilary worked in nonprofits and cooperatives for more than twenty years, advancing co-op development, fair trade, and community empowerment. As executive director of Women's Action to Gain Economic Security (now Prospera) from 2003 to 2011, she led the organization through a period of major growth, resulting in a network of five worker-owned green cleaning businesses providing 100 high quality jobs in San Francisco Bay Area communities. Participants’ family incomes rose by 80%, assets increased through robust profit sharing, and women gained skills and social capital. Since 2011, Hilary and Project Equity have consulted with leading cooperatives, developers and worker groups, such as Childspace Management Group, the Restaurant Opportunities Center United, and the Evergreen Cooperative Initiative. Hilary’s white paper, Worker Cooperatives: Pathways to Scale, was published in 2014 by The Democracy Collaborative and has become a key field building and practitioners’ resource.

Hilary graduated from Princeton University and is pursuing her MBA in Sustainable Management at Presidio Graduate School while launching Project Equity with co-founder Alison Lingane. Hilary and Alison are 2014 Echoing Green Fellows.

Michael V. Beall is the president and chief executive officer of National Cooperative Business Association and its CLUSA International program (NCBA CLUSA). NCBA CLUSA is the apex trade association for cooperative businesses across the United States and an international development organization implementing projects in 15 countries worldwide.

Before joining NCBA CLUSA in November 2012, Mike served as President and Chief Executive Officer of the Missouri Credit Union Association. Prior to that, Mike held the same title with the Maryland and District of Columbia Credit Union Association. In 2000, Mike became the first manager of governmental affairs for the World Council of Credit Unions (2000-2004). Mike holds a bachelor’s degree in Government and Politics from the University of Maryland, College Park (1987) and a Juris Doctorate degree from the University of Richmond, Richmond, Virginia (1991).
Dr. Ann Hoyt is internationally recognized for her innovative research and contributions to co-op education. Her work, including 29 years as a professor at the University of Wisconsin, Madison, has had an indelible impact on cooperatives and the cooperative movement.

As US food cooperatives were threatened by market encroachment from investor owned grocers, Ann recognized a need for governance education for boards and managers. She promoted governance methods that delineate clear board and management responsibilities, incorporate transparent accountability and emphasize strategic focus. These methods are now the predominant model used by contemporary consumer food cooperatives. The annual Consumer Cooperative Management Association conference (CCMA) Ann directed for 25 years and the Cooperative Management Institute (CMI) she developed served to promote and inspire a national community of food cooperatives, which spawned the National Cooperative Grocers Association, the Howard Bowers Fund and several other national initiatives.

Academically, Ann is an active author, reviewer, teacher, researcher and consultant on a wide variety of issues related to cooperatives, national and international cooperation, and cooperative governance. Ann is a dedicated cooperative practitioner, she has served on numerous cooperative and foundation boards, including 22 years with the National Cooperative Business Association, two as chair; six years with the National Cooperative Bank; and 20 years, nine as chair, with the University of Wisconsin Credit Union.

Daniel T. Kelley. An authentic leader and champion of cooperative development, Kelley spent more than three decades serving the cooperative sector. Most recently, he retired as board chairman and president of the agriculture supply cooperative GROWMARK, Inc. Kelley’s roots in the cooperative movement began in 1970 when, as a full-time farmer, he joined his local cooperative, Evergreen FS. He later served as president of the organization from 1985 to 2008.

A tireless champion of new ideas and innovation, Kelley is widely credited for shaping GROWMARK into the organization it is today. AgriVisor, a grain and livestock marketing analysis and brokerage service, was initiated during his tenure. A joint venture between GROWMARK and Illinois Farm Bureau, the venture has since expanded to serve Farm Bureaus in Iowa, Wisconsin, Indiana, Missouri and Ohio.

In the 1980s, Kelley shouldered efforts to reform the Farm Credit Banks, creating a foundation for success that the Farm Credit System, its member-owners and rural communities enjoy today. Over his career Kelley has served on many cooperative boards. He is currently on the board of Nationwide Mutual Insurance Company, CoBank and Illinois Agriculture Leadership Foundation, which he chairs.
**William J. Nelson.** Growing up on a farm in central Minnesota, William J. Nelson developed a passion for both agriculture and education, which laid the foundation for his career in the cooperative system. Early in his academic career, Nelson made connections to the cooperative model that would shape his outlook and be the key to his vision of working to prepare future generations for leadership.

After earning undergraduate degrees in Sociology and Political Science from the University of Minnesota-Morris and master's degrees in Studies of the Future from the University of Houston and Community Education from the University of St. Thomas, Nelson took a position at the University of Minnesota-Waseca, teaching a course in cooperative education. During the next 13 years, Nelson focused on education around agriculture, cooperatives, entrepreneurship and rural leadership and worked to connect the university and its students to real-world knowledge and experiences. Nelson also became involved with The Cooperative Foundation and served as its president for many years.

In 1992, Nelson was approached by Cenex, which later merged to become part of today’s CHS Inc., to develop an education grants program. For the next two decades, Nelson guided the CHS Foundation to a leadership role in cooperative education, encouraging collaboration and bringing together universities, businesses and cooperative leaders to educate the next generation. As president of the CHS Foundation and vice president, CHS Corporate Citizenship, Nelson has reached across all sectors to form new partnerships, strengthen ties and create innovation within the cooperative world.

**Judy K. Ziewacz.** For over 40 years, Judy has been a dogged champion for cooperative development, articulating a steady and unswerving vision about the power of cooperation, and persistently reminding cooperatives and cooperative institutions that they exist to empower people. Her incredible capacity as a strategist has resulted in cross-sectoral coalitions that have created critical infrastructure for the co-op community domestically and internationally. She has done all of this with consummate integrity and professionalism, engendering trust and respect.

Judy’s clear vision, strategic focus, and acumen for organization building has created a solid track record of accomplishment that has enriched our cooperative community. She was a driving force behind favorable state and federal legislation and policies that were enacted to empower people through diverse cooperative enterprises.

Ziewacz was instrumental in launching the nation’s first statewide cooperative development center – now known as Cooperative Development Services. She also played a key role in establishing CooperationWorks!, a national cooperative development network, which is responsible for the creation of hundreds of co-ops, thousands of jobs, and serving hundreds of thousands of members. As the Executive Director of the Cooperative Development Foundation, she led the charge for the creation of dotCoop, an important branding tool for cooperatives in the internet age.
Additional support for this program comes from the United States Department of Agriculture Rural Cooperative Development Grant.