



THE COOPERATIVE DEVELOPMENT FOUNDATION AND NCBA CLUSA

FINAL REPORT

DIVERSITY, EQUITY & INCLUSION

TRENDS IN THE COOPERATIVE

COMMUNITY

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BACKGROUND

Cooperatives—enterprises owned and democratically controlled by the members who use their services—have been a strategy to build community power throughout U.S. history. As cooperatives and their members seek to drive a more inclusive economy, they are increasingly asking themselves how they can reinforce the positive legacy of building community power to address structural inequality and the institutional practices that continue to divide. They often begin by adopting practices related to diversity, equity, and inclusion (DEI) that seek to expand the extent to which a cooperative’s membership and leadership reflects and empowers the broader communities it serves.

Diversity, Equity & Inclusion Trends in the Cooperative Community is a joint initiative of the Cooperative Development Foundation (CDF) and NCBA CLUSA that seeks to bring together cooperatives from all sectors to highlight and strengthen their role in building healthy, sustainable, and equitable workplaces and communities. With generous support from the Robert Wood Johnson Foundation, this initiative was inspired in part by research on the prevalence and range of DEI practices within specific co-op

sectors. Studies by groups like the Credit Union National Association (CUNA) Filene Research Institute, and National Co+op Grocers (NCG) suggest that some cooperatives are making important headway in this arena.

This initiative was designed to capture the state of current DEI efforts in the cooperative sector and identify approaches and practices that may assist the sector in advancing the vision of more people using cooperatives to build an inclusive economy. Cooperatives acknowledge that there is much work to do to capture this vision. And there is a willingness to explore how and whether the cooperative principles are enough to guide the way to a more inclusive economy. We hope that the learnings from this initiative can help the sector continue work that is needed to reach that goal.

7 COOPERATIVE PRINCIPLES

- › Voluntary membership
- › Democratic member control
- › Member economic participation
- › Autonomy and independence
- › Education, training and information
- › Cooperation among cooperatives
- › Concern for community

DEI SURVEY, REPORT AND FINDINGS

While work to address inequities and structural racism within the cooperative sector and by individual cooperatives is not new, there has not been a systematic or consistent approach to measuring those efforts across sectors. The first step in this project's journey was to respond to this need by conducting a national survey to map the



scope and prevalence of specific DEI practices across cooperatives of different types and industries.

Researchers at the University of Wisconsin Center for Cooperatives conducted a national, one-time survey in spring 2021 to learn about existing efforts among cooperatives in

the NCBA CLUSA/CDF community by using the [ABCs of Co-op Impact](#) framework. The survey asked about cooperatives' practices related to Democratic governance and empowerment; Equity, diversity, and inclusion; and the Financial security and advancement of workers. The [report](#) used the following definitions:

DIVERSITY is the representation of all our varied identities and differences, collectively and as individuals.

EQUITY seeks to ensure fair treatment, equality of opportunity, and fairness in access to information and resources for all.

INCLUSION builds a culture of belonging by actively inviting the contribution and participation of all people.

The data and survey results, based on responses from 140 cooperatives, are helpful but limited as only cooperatives within NCBA CLUSA's membership community were surveyed. A more comprehensive and ongoing survey instrument may help cooperatives better track and measure progress.

A key consideration in assessing DEI practices among cooperatives lies in the model itself. First, cooperatives are organized for the mutual benefit of members who use their services. Second, members democratically control their enterprise either directly or through an elected board of directors. Third, cooperatives' principle of "concern for community" means that their stakeholders extend beyond their membership. Taken together, this implies that DEI in cooperatives is not only about internal practices targeting employees but also about the extent to which a cooperative's membership and leadership reflects and empowers the broader communities it serves.

KEY TAKEAWAYS

1. There is a high level of interest in DEI among NCBA CLUSA members: The results of the survey clearly show a strong interest in DEI among members—85% of those surveyed responded that it is extremely or very important to improve DEI in their cooperative over the next five years.
2. DEI practices aimed at current and prospective employees are relatively common: A central goal of many DEI efforts in the workplace is to address inequality by increasing representation. Though DEI practices focused on increasing diversity in recruitment were common, more could be done. Co-ops need to systemically track demographic data for the kinds of targeted DEI practices that reduce workplace inequality.

Overall, 60% of participating cooperatives track data about gender, 53% track about race, and 21% track other characteristics such as age or education level.

- Adoption of DEI practices for other stakeholders is uneven: While tracking diversity among staff is somewhat common, the survey indicated fewer co-ops track diversity DEI within boards, membership and the broader community. For example, less than 30% of respondents systematically track demographic data about members, and only 22% report back to members on the status of DEI initiatives. Only 31% of those with DEI training make it mandatory for board members and only 15% have a purchasing policy that prioritizes contracts with vendors owned by historically marginalized groups. The report noted that more needs to be done. For a co-op (or any type of entity) to make progress on increased representation, it first needs to have accurate data so it can measure its progress.

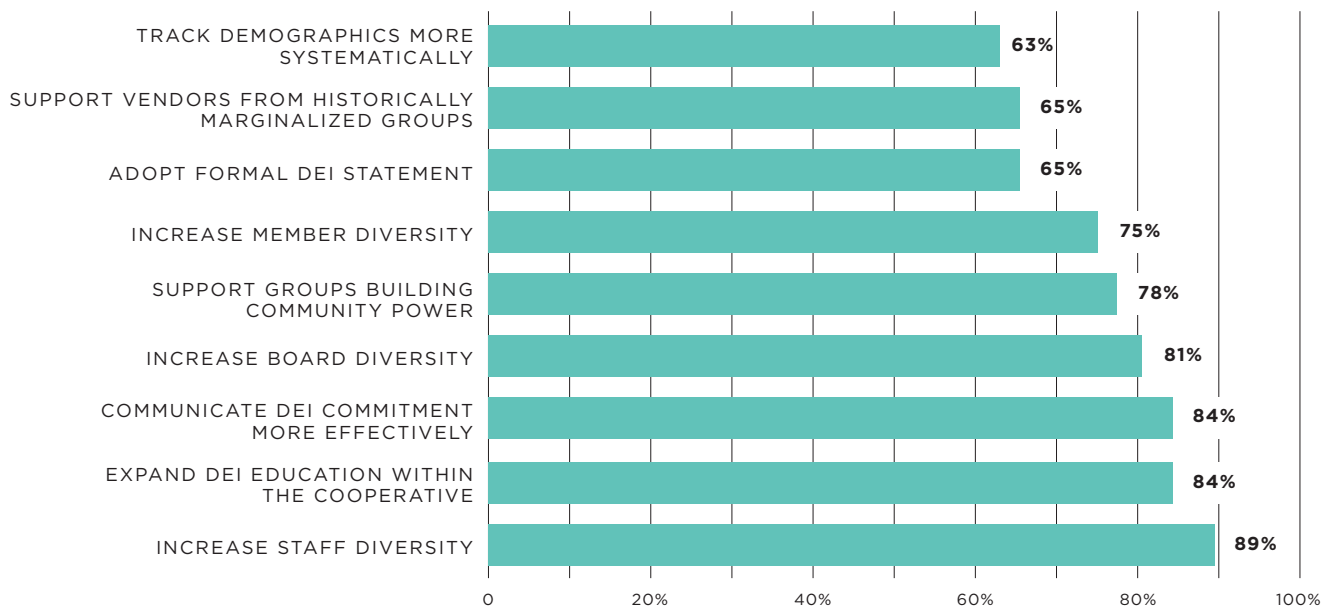
In terms of looking forward, many cooperatives reported specific five-year goals. These include more focus on increasing board diversity and building community power, recognizing the role and responsibility of cooperatives to the broader community.

In addition to enhancing DEI efforts among directors, members and the community, the survey indicated more intensive DEI training and a greater degree of organizational commitment to DEI through dedicated staff or consultants would benefit DEI goals. The extent to which cooperatives value DEI was clear; more than 71% (or 100 cooperatives) indicated an interest in participating in a peer learning cohort, the next step in this DEI initiative.

[Watch our webinar on the report to learn more.](#)

While tracking diversity among staff is somewhat common, the survey indicated fewer co-ops track diversity DEI within boards, membership and the broader community.

SHARE OF COOPERATIVES WITH SPECIFIC 5-YEAR GOALS



PEER LEARNING NETWORK – JOURNEY TO ACTION

One of the hardest parts of this work is knowing where and how to begin. — Survey participant, April 2021

DESCRIPTION OF JOURNEY

In addition to seeking responses from cooperatives about their DEI practices, the survey also invited cooperatives to participate in a professionally facilitated, cross-sector peer learning cohort that convened in July 2021. The goal of the peer learning cohort was to equip leaders with frameworks and tools to incorporate the best DEI practices with their cooperatives. From the 100 who expressed interest in the survey, the effort recruited 51 participants, with 41 actively engaging throughout the 12-month process.

The individuals who participated in the cohort submitted responses to an inquiry about their motivation for joining and what they hoped to get out of the cohort. The responses demonstrated a hunger for engaging in what several identified as challenging and difficult discussions—especially in privileged white board and staff business environments. There was also a desire to leverage the tools and practices of other cooperatives to help advance inclusion not only within their own boards and staff, but also the broader community.

Many commented that they felt cooperatives and their principles centered equity, inclusion and diversity, but they recognized co-ops often lag and struggle with DEI in practice.

“The newsletter announcing this cohort landed in my inbox just as I completed a meeting with a group that we had been working with for over 2 years – some core members began to question the group’s practices when it came to diversity, equity, and inclusion. I was a bit perplexed because what I knew about and learned about co-ops and what attracted me to this work was the focus on social equity and creating economic wealth for all. This concern raised a flag and triggered me to learn more about the DEI practices in the co-op world.”

Many expressed a desire to learn more about their own biases and how to address them.

“How do we discuss uncomfortable topics like systemic racism in the business space? I also wanted to learn about my own implicit biases and how those biases affect my personal and professional relationships.”

Several also identified the need to convince a hesitant or unaccepting leadership in their cooperative to take DEI action, as well as the need to make changes at the policy and structural levels, not just operational.

‘... to safely discuss my personal views and realities, learn strategies and ideas for making inroads with leadership who are unaccepting of certain topics; but also making myself as open and accessible to our staff in recognizing and implementing DEI needs.’

“My company has been involved in operational level DEI but we have yet to implement policy changes at the Board level. ... in order to maintain the changes in the long run we must apply [operational development] at a policy level, the highest and most important structural change we can make.”

Recognizing the role of cooperatives in broader societal structures and systems, some commented about the need to address and break down structural barriers and address policy issues.

“I’m drawn to this peer group to overcome that disconnect and build bridges so we can build stronger relationships within the whole community. We have a lot of work to do in breaking through decades of structural and systemic racism.”

With support from a team that included consultants and NCBA CLUSA staff, the peer learning cohort began convening over Zoom in June 2021. The virtual format created an initial

distance among participants, but after a few virtual convenings, participants began to open up and engage in more frank and honest discussion. Board members discussed their frustration with trying to engage in discussions on their boards to advance DEI efforts. Others who worked for cooperatives mentioned a lack of priority from leadership on the topic. Some white participants acknowledged that they just did not feel comfortable or know how to engage in discussions but at the same time felt these were the most important topics of the day for cooperatives.

“DEI is never-ending and we will always be reviewing and learning but I hope this will give us some tools and building blocks to start with.”

The cohort discussed and approached the work with the cooperative principles in mind. Are the seven principles enough to ensure DEI?

FROM JOURNEY TO ACTION

The facilitated learning experience—*Cultivating Equity and Building Power*—was a DEI peer group of co-op leaders. In the first six months the participants analyzed their own journeys and goals related to DEI in the context of their specific co-op. This participant self-study was complemented by readings and reflective writing that included identifying what levers of power they had and how, as leaders, they could move the needle to achieve more of their own goals in DEI. Cooperators were inspired to go to action immediately and became passionate about taking leadership and ownership of activities that could move DEI efforts forward. The following four projects emerged, each focused on a different challenge. The groups spent the second six months of the learning experience engaged in action.

- **THE HOW & WHY TO GET STARTED IN DEI FOR LARGER CO-OPS:** Larger cooperatives, like any large businesses, often struggle to move the entire organization forward, even when there is clear direction from leadership. Though large cooperatives may have an executive dedicated to DEI, a Vice President of DEI or Chief DEI Officer, it can be a slow and challenging process. This project focused on identifying strategies and sharing learnings, presenting easy

to understand actions to take when working in larger co-op environments to move DEI along. [Learn more here.](#)

- **DEI TOOLKIT:** Other cooperatives identified reluctant Boards and leadership as a challenge. Addressing a key but often overlooked need in the co-op sector, this group focused on developing a [toolkit](#) to for co-ops just beginning their DEI journey and integrating DEI into governance practices.
- **GOVERNANCE SUPPORT FOR SMALL & START-UP CO-OPS:** This project identified a specific need for small and start up cooperatives that don't have access to governance and other capacity building support. With dedicated support and building on existing relationships in the rural community in Alabama, this project supported a 15-member owned cooperative that produces turnips, oranges, sweet potatoes, corn, watermelons and other vegetables access key funding sources to help ensure food security for seniors and others in their community.
- **FOOD CO-OP FINANCE:** A persistent challenge for any cooperative is accessing capital to start or grow. But start-ups for systemically under-resourced and disenfranchised populations and communities face huge hurdles that include ongoing structural racist or biased policies and circumstances. For example, food cooperatives attracting higher income members in higher wealth communities have access to capital resources exponentially greater than in under-resourced communities. This project explored the cooperative principles of helping other cooperatives and communities, with an emphasis on ways the broader food co-op community can financially support start-ups.

The groups had an opportunity to present their projects to the broader cooperative community during NCBA CLUSA's 2022 Cooperative IMPACT Conference, which was part of the learning exchange process.

DEI TRACK AT IMPACT

NCBA CLUSA's annual Cooperative IMPACT Conference is the only national, cross-sector cooperative event elevating the conversation around a trusted, proven way to do business and build community. Under the theme "Forward, Together," IMPACT 2022 convened in person and virtually 500 cooperators from around the globe. The conference challenged the cooperative community to come together and capture a generational opportunity: applying the lessons learned from the previous two exceptional years to the work going forward. One of those lessons involved the need to for cooperatives to create meaningful diversity and equity.

As part of the RWJF initiative to identify trends and advance DEI efforts in the cooperative sector, IMPACT 2022 hosted a DEI track.

DEI TRACK: JOURNEY INTO ACTION PANEL DISCUSSION

Moderator: Jessica Mason, Start.coop
Panelists: Nirva Boursiquot, HeyKinfolk; John Holdsclaw IV, Rochdale Capital; and Jermeen Sherman, Black Ambition

[Watch this session](#)

DEI TRACK: SURVEY FINDINGS

Presentation: Courtney Berner, University of Wisconsin Center for Cooperatives

DEI TRACK: PROJECT LEADERS TEDX TALK

Moderator: Tamela Blalock, NCBA CLUSA
Panelists: Kim Christiansen, NRECA (via pre-recorded video); Audrey Haskin, Federation of Southern Cooperatives; Faye Tate, CoBank; and Leila Wolfrum, Durham Co-op Market

[Watch this session](#)

"Journey into Action" focused on exploring and engaging in frank discussions about how cooperatives have sometimes failed historically underserved communities and people in the past. The panel surfaced examples of efforts and approaches needed to take action to be more inclusive, and called on the cooperative sector to engage in authentic allyship—transferring benefits of privilege to those who lack in order to advocate for marginalized groups and support them to achieve change - cautioning against the performative nature of some of the current efforts. As one member of the panel put it, "Black human beings are over-mentored... We get a lot of invitations to the room but nothing happens. ...We have these panel discussions and after that, the wealth gap is still there... I'm tired of being the first Black person at some tables in the room."

"We're very, very passionate about making sure that we change that narrative of what it means for Black owned businesses to actualize into sustainable business for the long term and not only rely on trauma to support us today."

Speaking to how the co-op sector can or does embody the seven cooperative principles, panelists discussed what several of the principles, including education, voluntary and open membership and economic participation mean in the context of addressing structural and systemic racism.

"We're very, very passionate about making sure that we change that narrative of what it means for Black owned businesses to actualize into sustainable business for the long term and not only rely on trauma to support us today."

EDUCATION – This principle came up often in the discussion, including about empowering communities by educating not only about the cooperative model but also the history of cooperatives in the Black community.

“I think that the intention of co-ops is to represent their communities. I think what’s kind of a challenge is building out a complementary funding ecosystem...”

Comparing founders passionate about what they are building but with an end goal of wealth accumulation for their families, one panelist said: *“Cooperatives don’t exist that way—the idea is to build something that is sustainable—that adds value beyond them as an individual and the data on that is really*

solid. Cooperatives pay higher wages—living wages, they create more educational opportunities for employees. So when I think about cooperatives and their ability to kind of be a vehicle for diversity, equity and racial justice, I actually don’t think they’re separate. I think that the intention of co-ops is to represent their communities. I think what’s kind of a challenge is building out a complementary funding ecosystem that makes that much easier.”

VOLUNTARY AND OPEN MEMBERSHIP – One panelist discussed the struggle in their cooperative environment with the principle of voluntary and open membership. Acknowledging that they “have to be very careful because what we don’t want to do is to perpetuate the systems that are already not being faithful to that principle,” they pointed out that it is a time to double down and super serve the Black community. As authentic allies, the cooperative sector should support activities that are “only for us” until a pathway or a pipeline exists to fill the big gap between supporting Black-owned business only in the wake of trauma to creating sustainable Black-owned businesses.

ECONOMIC PARTICIPATION – Highlighting the lack for under-resourced communities of access to wealth and financing that comes with privilege, panelists discussed the challenges of the principle of economic participation. Citing the impact of Covid-19 on Black and Brown businesses, one panelist told

the audience they knew why—“they didn’t have two things: they didn’t have friends and family because if you’re not black or brown you can go to friends and family.” Pointing to ways to make genuine attempts at allyship, one panelist suggested “creating true pipelines in every sense of the word like tangible things—not only mentoring us but also again cutting the check would be amazing.” This touches on two other co-op principles—cooperation among cooperatives and concern for community.

While the panel discussed examples of efforts to bring together capital and mentoring to support co-ops developed by Black and Brown founders, one panelist reminded the audience of the opportunity to use the principle of economic participation “to really explore sources of wealth in minority communities that we don’t consider,” such as churches sitting on major real estate assets that could be more actively invested. Circling back to the education principle, a panelist suggested to go “a little upstream in education” to begin conversations with stakeholders in the community about investing the community’s own resources.

The strategies discussed to address racism and driving inclusion through cooperatives did not stop at the seven principles. In fact, the panelists agreed that while the seven principles, which were developed at a very different time, may be used as strategies to support DEI efforts, it is time for an eighth principle devoted to DEI. In response to the suggestion that DEI could be more intentionally integrated into the other principles as a way to move forward, one panelist noted that if we were already doing that, we would not need an eighth. “The eighth principle is the commitment as a community to say this is something we value.”

After discussing various principles in the first panel, the second panel pivoted to the sixth cooperative principle, cooperation among cooperatives. The peer learning project involved co-op leaders from different cooperatives working together to exchange learnings and advance DEI efforts across cooperative sectors. The peer learning cohort project leads presented on their projects during TEDx style talks.

1) GETTING STARTED IN DEI AT LARGER CO-OPS: The Vice President for DEI at CoBank presented a set of strategies for implementing DEI. After noting the importance of making the business

case for DEI, which research has shown is good for the bottom line, she said that while the work has been done for several years, the stakes are higher now as the social justice issues that permeate our communities and nations are coming into the workplace. Essential to any DEI effort is commitment from leadership, along with a budget to do the work. She counseled the audience that “each and every one of you all have an individual and collective responsibility to have awareness and be able to speak about the critical nature of this work.”

2) DEI TOOLKIT: A managing director at NRECA engaged in its Business and Technology Strategies Management Services spoke about the governance toolkit her group developed for use by co-op boards just starting their DEI journey. Citing the fact that the board is the key governance entity in the co-op, setting the tone for the culture in the cooperative, and the issues of social justice rely heavily on the cooperative culture, the group focused on creating and crafting tools to help those who are beginning to think about how to move into social justice issues and to do it in a meaningful manner. First and foremost, tools to help start the conversation are needed for a board that may or may not know that they need to deal with social justice issues.

3) GOVERNANCE SUPPORT FOR SMALL & START-UP CO-OPS: The Program and Training Coordinator at the Federation of Southern Cooperatives walked people through the work they did to create the Forkland Community Farmers Cooperative—a direct result of the DEI peer cohort. Demonstrating the power of cooperation, the group was able to help with governance and other operational support, and identify and secure key government funding to help a group of farmers in a small community in West Alabama who “were ready for somebody to come along and say you can do this, let me show you how.”

4) FOOD CO-OP FINANCE: The General Manager of Durham Food Co-op presented on her project’s journey, cautioning “that this is a story with the beginning but no real end to it.” Based on her experience and roles in food cooperatives, she wanted to engage peers to think about ways to leverage financial and operational support for start up cooperatives that are moving from the community organizing to the retail grocery management phase. She and her group spent their time engaging the broader food cooperative community in a very specific idea. The idea is for the larger food cooperative network to leverage their purchasing power to provide

From left: Jessica Mason, Nirva Boursiquot, John Holdsclaw IV and Jermeen Sherman speak on the “DEI Track: Journey into Action” session at the 2022 Cooperative IMPACT Conference.



ongoing support for start-up cooperatives to be able to support the full breadth of types of food co-ops that exist and would like to exist in our communities.

"We all love giving advice but casual support from individual co-ops really can't do much to address the challenges faced either by the startups themselves or by the funders. What we need is a way to build resilience and more predictable results into situations that are currently overwhelmed by unknowns."

The theme throughout these DEI presentations was the importance of co-ops working with other co-ops and their communities, and the need to be persistent and consistent in ensuring we bring inclusion into co-ops, regardless of the setting, sector, geography or leadership. In other words, practicing principles of cooperatives helping

cooperatives and concern for community can achieve tangible results that advance DEI. Several engaged in the peer learning cohort projects commented on how the engagement with each other on the projects fostered relationships that might not have otherwise surfaced. They voiced their appreciation of the opportunity and the hope that these efforts could continue.

"I was blessed to be a member of NCBA's committee that worked on diversity, equity, and inclusion or social justice issues over the last approximately 12 months. I worked with a very talented group of Cooperative leaders from across the nation and developed relationships that I think will last for a long time in the future."

For a video about the peer learning experience that may help you engage in DEI efforts in your cooperative or sector, please visit [this link](#).



Leila Wolfrum, center, with cohort facilitators Tamela Blalock (left) and Cullen McKenney (right) at IMPACT 2022.



From left: Faye Tate and Audrey Haskin present at the IMPACT Conference.

VOICES OF COOPERATIVES

“Though our teachings have been shattered, each of us carries a shard and when we work together, we are made whole.” — Lea Zeise, Ohe-láku Cooperative

PERSPECTIVES

Sharing perspectives, learnings and practices is essential to DEI efforts. We invited several cooperators who represent different perspectives, sectors, cultures and needs to prepare articles on what DEI means for them or their sector. What these voices and perspectives tell us is that cooperatives continue to be structures that can be adapted to serve the needs of the members and communities that create them.

These articles are included in the Fall 2022/Winter 2023 issue of the *Cooperative Business Journal*. The following briefly describes each of the articles that depict how the cooperative model is being used across sectors and communities to address and overcome centuries of oppression and genocide and provide opportunities for true empowerment of people and communities.

In *Tending Seeds*, families of the Oneida Nation tell us the story of how they honor the centuries old teachings and seeds of their culture by working side by side to plant, weed and harvest corn through the Ohe-láku corn cooperative. When creating their cooperative, the group identified seven strategic goals that include preserving their culture, protecting their seeds, building community and passing traditions on to the next generation. Profits and pay were not included in the goals as growing corn is seen as a cultural responsibility. But growing farmers equipped with ancestral knowledge of regenerative practices has helped the volunteer cooperative steward 30 acres and harvest an abundance of corn to meet the needs of each family in Ohe-láku and beyond.

Doorway to Dreams describes how worker cooperatives, the fastest growing cooperative sector, invite even the most marginalized inside the forbidden space of ownership. Low-wage

immigrant worker owners, who have few resources, poor job opportunities and little voice or power, have found a path to controlling their financial futures through worker-ownership.

A wave of Black-led worker cooperatives is helping to address persistent lending and employment discrimination practices. Looking to within the community to pool resources is not new to Black Americans, who have a long history of establishing cooperatively-owned business enclaves to help sustain their communities in the face of white-monopolistic business communities that would not fairly employ, lend or trade with them.

For home care cooperatives, whose worker owners represent immigrants and women of color, ownership means many things, including risking their own health during the pandemic as they have provided crucial care support and helped to counter the acute social isolation many of their clients have experienced. *Building Community, Forging Respect* describes examples of home care cooperatives that seek to counter the exploitative experiences that many members have had working in previous jobs, including labor violations and acute precarity working in the informal economy, and provide a place of refuge given the racism and trauma many members encounter in other domains.

In *Empowered Entrepreneurs*, we are reminded that while the cooperative model offers people of color, especially women, opportunities for more autonomy, independence and wealth, the cooperative industry has a problem. Calling on the cooperative sector to lead by example, by more deliberately promoting and practicing racial equity and unlearning racist attitudes, the author identifies specific strategies to help catalyze the tremendous pool of talent and energy that minority founders represent. But before co-ops and



members support unmet needs, they need to ask founders and others what they need.

Profits before People echoes the need for cooperatives to address the longstanding disparities in financial health by race, ethnicity, gender and income. This piece reports on analysis done by the Credit Union National Association that demonstrates the meaningful and measurable

“credit union difference,” highlighting the benefits of serving and pooling capital by and for the 130 million members of credit unions. The analysis showed how relative to non-co-op financial institutions, credit unions are significantly more effective in advancing financial well-being and resilience across various measures of financial health. It also identified how trust, service and community focus play a role—especially for young people and people of color who seek relationship with organizations that have an obvious commitment to them.

The voices represented in these articles all speak to the role and responsibility of cooperatives to meet unmet needs and provide real and ongoing support for communities and people historically overlooked, marginalized or under-resourced. They also point to the value of measuring the why and the how cooperatives can advance DEI to make sure that the sector is making real change.

Oneida Nation families prioritize passing on traditions on to the next generation. Their story was featured in the *Cooperative Business Journal*.



Photo courtesy Ohe-láku Cooperative

SEABURY HOUSING COOPERATIVE PEOPLE ADVANCING EQUITY AND INCLUSION WHILE PRESERVING DIVERSITY IN THEIR COMMUNITY

As gentrification continues to envelop communities, exacerbated by the largest transfer of intergenerational wealth in history and increasing housing prices and mortgage rates, it risks advancing racial inequality and displacing low-income residents. Affordable housing cooperatives have helped communities preserve diversity while helping provide resident owners with housing security and a means to build equity. The principles of economic participation, cooperation among cooperatives and concern for community intersect in housing sector and can help maintain representation within and across communities.

To hear the perspective of an affordable housing cooperative, we visited Seabury Cooperative in New Haven, Connecticut. Established in 1973 along with several other HUD-financed similar properties, the 7 story, 88-unit cooperative provides permanent housing and ownership opportunities for those with limited incomes. One of last of the surviving LECs in New Haven, Seabury has faced significant challenges presented by gentrification, the pandemic, rising costs of housing, and ongoing governance, management and infrastructure challenges. Blocks from Yale University, and conveniently located near neighborhood amenities, they recently celebrated their 50th anniversary in an atmosphere of hope. With the help of UHAB and others, this co-op hopes to continue for another 50 years and beyond. [Watch their story here.](#)

Seabury Housing Cooperative residents celebrate their co-op's 50th anniversary.



Photo courtesy Patricia Parks-Taylor

ON THE HORIZON - VIEWS OF EMERGING COOPERATORS

The U.S. population is quickly changing, with people of color comprising over half the nation's youth, bookended between a large Gen Z and aging populations, there are more opportunities and more need than ever for intergenerational solidarity. Unless we can work across generations and differences, we will not be able to solve the crises we face. The cooperative sector needs to reach out and create opportunities for everyone in this changing landscape interested in cooperatives—and DEI needs to be at the core of these efforts.

The International Cooperative Alliance (ICA) in 2022 recognized international youth day with the theme *Intergenerational Solidarity: Creating a World for All Ages*, aiming to amplify the message that action is needed across all generations to achieve the UN's sustainable development goals and leave no one behind. Ana Aguirre, ICA Global Youth Network Representative, reminded the world that "Cooperatives are a tested tool for generating economic empowerment, social development, decent work, mutual support and autonomy at work for youth while enhancing their voice in society as already stated by the United Nations' World Youth Report. As we have recently echoed during the International Day of Cooperatives, a different world is not only possible, but we are already building it. A human centered economy run democratically, rooted in the territories and who cares for the people and the planet. This is the world we want and the one we are building as cooperators."

Recognizing the need to include, inspire and support emerging cooperators to enhance a human centered economy, the Cooperative Development Foundation and NCBA CLUSA launched the Cooperative Leaders and Scholars (CLS) program in 2017. In 2022, we welcomed 23 cooperators in the CLS cohort to Washington, DC during the IMPACT Conference for a week of programming, learning, peer exchange and networking. As newcomers to the NCBA CLUSA space,

participants were also invited to reflect on how they see cooperatives—including, and especially, NCBA CLUSA—advancing diversity, equity, and inclusion (DEI) as these organizations work toward a more inclusive economy.

Throughout the programming and events, and in follow up interviews with some of the members of the cohort, participants expressed gratitude about being brought more into the cooperative space and the felt desire for cooperatives to be more representative and responsive to needs across demographics and geographies.

"Panelists and speakers took a risk, speaking honestly, and I really appreciated that. I hope the seeds planted by the presentations grow when people are back in their workplaces."

Members were asked how we can do better and offered some advice for the cooperative sector and ways NCBA CLUSA can help.

BE MORE TRULY INCLUSIVE – One member, self-described as "reblooming as a cooperator" talked about the significance of cooperatives in the civil rights movement but noted despite this rich history and shared mission, there are gaps to full inclusivity. "I saw [at Co-op IMPACT] an emphasis on racial and ethnic diversity — which admittedly leaves others out. For example, how about the LGBTQ community? How have cooperatives been used by the queer community to meet their needs?"

Another cohort member echoed this and added "There are never enough Latinx voices."

"I'm not eager to see us continue to silo ourselves into ethnic divisions. Our country and the world are more and more divided. We need something to bring us together; we're sharing a national space, natural resources...what can bring us together? How about the cooperative principles?"

"If you're going to have the conversation, you should have the people in the room—LGBTQ+, women, and more. The dialogue around diversity is good, but you should always consider: who is not yet included?"

FIND OUT AND SHOW US HOW COOPERATIVES CAN SERVE OUR NEEDS – Linking cooperatives to the needs of individuals and communities would help identify opportunities to develop cooperatives. As new cooperators, it is not always obvious or clear what and how cooperatives may serve a need.

FINANCIAL SUPPORT IS KEY – As voiced by participants in the peer learning experience and panelists in the DEI track at the conference, the co-op sector must help fund under-resourced communities and founders to demonstrate true commitment to inclusion and principle 6.

"If the opportunity is there, financial support—even a modest amount—can have a big impact."

MAKE CONNECTIONS AMONG COOPERATIVES WHERE YOU ARE – Cohort members said that engaging in the cross-sector cohort and attending IMPACT showed them there were many opportunities to connect to other cooperatives in their areas. And since October, there have been several local in person engagements among cohort members who reached out to each other and other cooperatives in their communities.

BE SPECIFIC AND REPRESENTATIVE IN LANGUAGE AND ACTION – As one member noted, the term BIPOC is often used, but really is an umbrella term. He encouraged organizations like NCBA CLUSA to be more intentional about what group they are speaking about, to make it more direct.

"And if the message is for a particular community, be sure the moderator is from that community. In terms of the language used, acknowledgement and transparency is key."

REACH OUT BEYOND THE COOPERATIVE COMMUNITY TO SPREAD THE WORD –
"I think NCBA CLUSA is really good at solidifying existing cooperatives, but I wonder if there is an opportunity to reach out more to the general public—especially marginalized communities—as a way to increase awareness and understanding, and to enable greater access to the co-op space."

ASK WHAT IS NEEDED BEFORE ACTING – Echoing comments voiced in the DEI IMPACT panel as well as *Empowering Entrepreneurs*, one member stressed the need to ask before jumping in with help.

INCREASE THE NUMBER OF ONLINE EVENTS AND WEBINARS – One member suggested that NCBA CLUSA could increase accessibility for diverse audiences by continuing and increasing online offerings.

As a result of the high degree of peer activity and learnings that participants expressed, the CLS program has been expanded to an eight-month program in 2023. The cooperative sector can embrace and support these efforts to engage the energy and enthusiasm of these new cooperators and emerging leaders, which help grow and retain cooperators across generations.



Members of the Cooperative Leaders and Scholars (CLS) program network at IMPACT 2022.



RECOMMENDATIONS

If there is one key takeaway from this initiative—from the survey and peer learning cohort to the DEI track and perspectives shared from across sectors and communities—it is that DEI cannot be an isolated project or occasional track. It needs to be at the core of the cooperative sector if we as a sector embody our principles, values and vision for an inclusive economy. This not only means all the stakeholders—the staff, boards, members, and communities in which the cooperative exists—but also the policies that either continue to enable exclusion or can alleviate barriers to inclusion. The challenge facing the cooperative sector is how do you measure success with work that is, as several cooperators noted, never ending?

STRATEGIES FROM THE SURVEY REPORT

Successful DEI initiatives require an ongoing 360-degree commitment to representation of all our varied identities and differences; fair treatment and equality of opportunity; and a culture of belonging that actively invites the contribution and participation of all people. The following potential strategies can be used to operationalize the cooperative values of equality, equity, and solidarity.

MAKE YOUR INTENTIONS KNOWN

- Adopt a formal board statement that relates your cooperative's mission and vision to diversity, equity, and inclusions goals.
- Publicize your statement with employees and members.

LISTEN AND LEARN

- Engage a consultant, designate a DEI officer and/or appoint a DEI Committee to implement DEI interventions at the board, staff, member, and community levels.

- Target training and professional development to the needs of specific gender and racial groups. Targeted practices are more likely to reduce workplace inequality than “identity-blind” ones.
- Increase the duration and frequency of DEI training.
- Make DEI training mandatory for board members.
- Provide DEI training opportunities for members of consumer cooperatives.
- Examine the influences and biases that have shaped the cultural norms of the co-op over time and consider whether and how these norms are in alignment with launching successful DEI efforts.

EXPAND TRANSPARENCY IN BOARD/STAFF RECRUITMENT

- Recruit staff and board members that reflect the community.
- Actively encourage members of specific groups to apply for open positions.
- Promote transparency in staff promotions by requiring that all job listings include specific skill requirements and are posted for current employees.
- Advertise job openings in places that reach diverse audiences using language that is welcoming to candidates of different backgrounds.

TRACK AND REPORT

- Systematically track demographic data of members in addition to staff and board members in ways that allow individuals to self-identify.
- Analyze data from staff exit interviews, promotions, and compensation to look for growth opportunities.

- Report on your progress to the board, employees, and members.

MAKE YOUR COMMITMENT REAL IN THE COMMUNITY

- Establish purchasing policies that prioritize contracts with vendors owned by women and people of color.
- Support community power building efforts and partner with other organizations building community power.

ASK, LISTEN, SUPPORT AND REDESIGN - PRACTICING AUTHENTIC ALLYSHIP

Throughout every activity of this DEI initiative we heard the message that the cooperative sector needs to go beyond rhetoric to action, advancement and authentic allyship if we are to be inclusive and center DEI.

Here are the key strategies we identified:

- **ASK** those who are not included what they need. Then leverage your role as a co-op leader, board member, colleague or co-op member to understand and elevate those needs.

"Asking what people want before acting is a more respectful approach to any support effort." - Chynnique Ross, Esq., Elizabeth L. Carter, LLC

- **LISTEN** to both those within and outside the cooperative sector about how we can support. The articles and videos above helped raise the voices of the historically underserved, oppressed and overlooked. There are specific asks in each of those articles that we can all learn from. More efforts to elevate the voices are needed if we are to clear the path to inclusion.
- **SUPPORT** a spectrum of needs, but focus on financing because that is the most challenging and the most needed. Such support not only demonstrates true allyship but also recognizes that access to sources of wealth and support from family and friends is a privilege that has resulted from policies that have perpetuated inequality.

- **REDESIGN** Employ a "review and redesign" approach to addressing inequity. What intentional policies and systemic structures lie at the root of racism and inequity? Understand and acknowledge this deeper context and its impacts. When creating strategies to spur change, ensure that they not only reverse, but provide sustainable solutions to the root causes of inequity. Know that an equal or greater action is required to counter the original policy or structure.

FOR FURTHER DISCUSSION - PRINCIPLE EIGHT

During the DEI Track, several panelists expressed support for a new principle, which in recent years has been advanced by members of the cooperative movement, most notably credit unions. Championed by the former chair of CUNA and recently retired Local Government FCU and Civic FCU CEO Maurice Smith in 2019, the 8th Cooperative Principle would add an 8th Cooperative Principle focused on diversity equity and inclusion. Also in 2019, the boards of Credit Union National Association and National Credit Union Foundation adopted a resolution to support diversity, equity and inclusion as an 8th cooperative principle. In 2019, the NCBA CLUSA Board of Directors passed a resolution on Diversity, Equity and Inclusion. In the resolution, the board states that the cooperative movement is guided by the ideals of diversity, equity and inclusion, which are embedded within our shared values and principles. The Board expresses "support for efforts to ensure that diversity, equity and inclusion are clearly understood and enacted priorities within our shared Cooperative Values and Principles." As directed by the Board, NCBA CLUSA leadership has engaged the global community, including the International Cooperative Alliance, to ensure diversity, equity and inclusion are enacted priorities.

Various discussions during this initiative raised the issue of whether engagement in the seven cooperative principles results in DEI. One DEI track panelist reminded us that members "have to be able to see themselves in those principles" so at a minimum the principles need to be presented and written in ways that connect to the members. While others felt that if cooperatives were true to

the current cooperative identity, then diversity, equity and inclusion should be part of the cooperative. Specifically, some have suggested that more emphasis should be placed on the current cooperative values, which are self-help, self-responsibility, democracy, equality, equity, and solidarity as evidence that notions of DEI are already within the co-op identity. But many have questioned that assumption, arguing there is a need for a Principle 8 for cooperatives to commit to DEI as part of the cooperative model and values.

NEXT STEPS

MEASURING SUCCESS – The DEI survey, along with other efforts to demonstrate whether and how the cooperative sector is advancing DEI goals, help cooperatives benchmark their DEI status and work. But the survey is only a beginning. It showed not only that more data and information needs to be shared but also that more work needs to be done—especially engaging with the broader communities in which cooperatives operate—if we are to embody cooperative principles in ways that ensures inclusion. Though it is challenging to measure success for DEI when it is an ever-evolving process that requires the cooperative sector to engage all stakeholders and their communities in reflection, outreach and authentic allyship, the cooperative sector needs to do it. A key question is who and how that success is measured.

BE MORE SPECIFIC AND ALL

ENCOMPASSING – We need to make sure all our work is more intentional and inclusive of all groups, and that we more directly identify the groups. Whether it is in data tracking, presentation of issues, people in the room or at the table, we need to do a better job of making sure all groups and all

perspectives are identified and included.

CULTIVATE PEER LEARNING – The peer learning experience proved the obvious—when working together, much can be achieved. Developing relationships outside your cooperative has to be an ongoing and supported activity if the co-op sector ever hopes to embody representation and inclusion-. Reaching out to the entire peer cohort to ask them what they thought of the process and how more peer learning can be done will be a first step towards moving more of these efforts along.

ROLE FOR NCBA CLUSA – As the national apex organization, we will continue to serve the co-op community in the context of DEI. As with most entities, our opportunity is how to evolve our DEI work from “special project” status into the very DNA of all of our work. We were deliberate in considering how to weave equity and inclusion in all of our lines of work in our Five-Year Strategic Initiatives that NCBA CLUSA's Board of Directors adopted in December 2022. This means centering DEI in our public affairs, advocacy, thought leadership, development and membership engagement. It also means implementing an internal DEI strategy for our staff and employees. And as part of the membership strategy, we know we need to be more forward in asking what people want and need in the context of DEI, including seeking input on how to best convene the cooperative community and encourage peer learning. Critically, we must address both the causes of our current state of inequity and the collaborative, long-term solutions that will create an inclusive economy through cooperatives.

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The views expressed here do not necessarily reflect the views of the Foundation.