

Diversity, Equity & Inclusion Trends in the Cooperative Community Questionnaire

Developed by the National Cooperative Business Association CLUSA International, Cooperative Development Foundation, and University of Wisconsin Center for Cooperatives with support from the Robert Wood Johnson Foundation

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Dear Cooperator,

NCBA CLUSA is partnering with the Cooperative Development Foundation (CDF) and Robert Wood Johnson Foundation to launch a new initiative called **Diversity, Equity & Inclusion Trends in the Cooperative Community** ([click here for details](#)).

As a first step, researchers at the University of Wisconsin Center for Cooperatives are helping us conduct a survey about existing efforts related to:

- Democratic governance and empowerment;
- Equity, diversity, and inclusion;
- Financial security and advancement of workers.

The survey also invites your cooperative to participate in a peer learning cohort we will convene in mid-2021 for cooperatives looking to expand their work in these areas.

Please take a few minutes to participate by completing this brief online survey.

You are receiving this invitation as a leader in a cooperative that is part of the NCBA CLUSA-CDF community. You may also forward it to another person who can answer these questions on behalf of your cooperative such as your CEO or Diversity, Equity, and Inclusion Officer. If you do not have this authority, please forward it to a colleague who does.

The survey is **voluntary** and **confidential**. You may skip any questions you do not wish to answer. Your responses will only be shared with NCBA CLUSA and CDF in a way that does not allow your cooperative to be identified in the final results. Information collected as part of this research will only be used for this study. There is a minimal risk for breach of confidentiality. If you decide not to participate or to withdraw from the study, you may do so without penalty.

Ultimately, our goal is to support all cooperatives in increasing their impact internally and in the communities they serve. While there are no direct benefits to you for participating in the survey, doing so will enhance our collective understanding. We will share findings in the Cooperative Business Journal and discuss them at the 2022 Co-op Impact Conference. **Each participating cooperative will also receive an advance analysis of the results and one complimentary admission to the 2021 Co-op Impact Conference in October.**

Some of the questions ask directly about practices at your cooperative. Where you are uncertain about an answer, please ask a colleague. If you have any questions, please contact the Principal Investigator at the University of Wisconsin Center for Cooperatives, Laura Hanson Schlachter, at lhanson4@wisc.edu or (608) 261-1355. You may also contact the UW-Madison Institutional Review Board at (608) 265-4312.

Continuing with the survey indicates that you have read this consent form, had an opportunity to ask any questions about this study, and voluntarily consent to participate.

Many thanks,

Doug O'Brien, President and CEO, NCBA CLUSA
Leslie Mead, Executive Director, CDF

Diversity, equity, and inclusion are distinct concepts and can mean different things in different organizations.

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.

These first questions build on our 2018 [ABCs of Co-op Impact](#) report, which defines **diversity, equity, and inclusion** as the extent to which cooperative membership and leadership reflects the communities it serves and gives a voice and leadership opportunities to historically excluded communities and individuals.

Does your cooperative have a **committee** focused on diversity, equity, and inclusion?

- No
- Yes

Which of the following groups have representatives on your cooperative's diversity, equity, and inclusion committee?

	No	Yes
Members	<input type="radio"/>	<input type="radio"/>
Staff	<input type="radio"/>	<input type="radio"/>
Board	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

What **other groups** have representatives on your cooperative's diversity, equity, and inclusion committee?

Has your cooperative hired a **consultant** to work with your organization on diversity, equity, and inclusion?

- No
- Yes

Does your cooperative have a **staff position** dedicated to diversity, equity, and inclusion?

- No
- Yes

Has your cooperative board adopted a **formal statement** related to diversity, equity, and inclusion?

- No
- Yes

Please **share your cooperative's formal statement** related to diversity, equity, and inclusion.

Since this statement was adopted, has your cooperative made **changes** in any of the following areas?

	No	Yes
Strategic planning	<input type="radio"/>	<input type="radio"/>
Tracking demographics of cooperative members, staff, or board	<input type="radio"/>	<input type="radio"/>
Hiring staff	<input type="radio"/>	<input type="radio"/>
Professional development	<input type="radio"/>	<input type="radio"/>
Recruiting board members	<input type="radio"/>	<input type="radio"/>
Training	<input type="radio"/>	<input type="radio"/>
Operations	<input type="radio"/>	<input type="radio"/>
Community services and outreach	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>

Since this statement was adopted, what **other areas** has your cooperative made changes in?

Does the board receive **regular reporting** on the status of diversity, equity, and inclusion initiatives at your cooperative?

- No
- Yes

For each of the following groups, does your cooperative systematically track **demographic data** about ...

	Gender?		Race?		Other characteristics?	
	No	Yes	No	Yes	No	Yes
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What **other demographic data** does your cooperative track for staff, board members, or members?

For each of the following groups, does your cooperative's system for tracking demographic data allow individuals to **self-identify** characteristics like gender or race?

	No	Yes
Staff	<input type="radio"/>	<input type="radio"/>
Board members	<input type="radio"/>	<input type="radio"/>
Members	<input type="radio"/>	<input type="radio"/>

Thinking about **recruiting board members** at your cooperative, does your organization use any of the following strategies to increase diversity on the board?

	No	Yes
Recruiting members of historically marginalized groups for leadership development programs	<input type="radio"/>	<input type="radio"/>
Advertising board service opportunities in places that reach diverse audiences	<input type="radio"/>	<input type="radio"/>
Actively encouraging members of specific groups to run for the board	<input type="radio"/>	<input type="radio"/>
Other strategies	<input type="radio"/>	<input type="radio"/>

What **other strategies** does your cooperative use to increase diversity on the board?

These next questions focus on the relationship between **diversity, equity, and inclusion** and **enhancing the financial security and advancement of employees**. Our [ABCs of Co-op Impact](#) framework recognizes living-wage jobs with benefits and increased opportunity for wealth building, career advancement, training, and leadership development as elements of this relationship.

Thinking about **hiring staff** at your cooperative, does your organization use any of the following strategies to increase staff diversity?

	No	Yes
Using language that is welcoming to candidates of different backgrounds in hiring communications	<input type="radio"/>	<input type="radio"/>
Advertising job openings in places that reach diverse audiences	<input type="radio"/>	<input type="radio"/>
Recruiting at job fairs, educational institutions, or through organizations that attract members of historically marginalized groups	<input type="radio"/>	<input type="radio"/>
Actively encouraging members of specific groups to apply for open positions	<input type="radio"/>	<input type="radio"/>
Other strategies	<input type="radio"/>	<input type="radio"/>

What **other strategies** does your cooperative use to increase staff diversity?

Thinking about **supporting employee financial security and advancement**, does your organization ...

	No	Yes
Provide health insurance through the cooperative?	<input type="radio"/>	<input type="radio"/>
Offer retirement savings programs through the cooperative?	<input type="radio"/>	<input type="radio"/>
Offer paid family leave beyond what is required by law?	<input type="radio"/>	<input type="radio"/>
Require that all position vacancy listings specify skill requirements and are posted for current employees?	<input type="radio"/>	<input type="radio"/>
Use other strategies to support employee financial security and advancement?	<input type="radio"/>	<input type="radio"/>

What **other strategies** does your cooperative use to support employee financial security and advancement?

Does your cooperative offer **professional development opportunities** for employees from historically marginalized groups? Examples include mentoring programs and networking events.

- No
- Yes

Does your cooperative **evaluate its culture of workforce inclusion**, for example by analyzing data from staff exit interviews, promotions, and compensation?

- No
- Yes

Does your cooperative offer **training** related to cultural awareness, unconscious bias, or other topics related to diversity, equity, and inclusion?

- No
- Yes

Is this training **mandatory** for ...

	No	Yes
Staff?	<input type="radio"/>	<input type="radio"/>
Board members?	<input type="radio"/>	<input type="radio"/>

Is this training available to **members**?

- No
- Yes

How is this training **delivered**?

- In person
- Online
- A mix of in person and online

Does this training use **active forms of instruction** like discussions or simulations?

- No
- Yes

How **long** is this training?

- Less than four hours
- Four hours or more

These next questions focus on **democratic governance and community power building**. Our [ABCs of Co-op Impact](#) framework defines democratic governance as encouraging members to actively participate and shape the mission and decisions of the cooperative. Community power building involves developing, sustaining, and growing the ability of communities most impacted by structural inequity to enact systemic change through democratic structures.

Does your cooperative have a **purchasing policy** that prioritizes contracts with vendors owned by historically marginalized groups?

- No
- Yes

Thinking about how your cooperative **communicates** its commitment to diversity, equity, and inclusion, does your organization ...

	No	Yes
Make your diversity, equity, and inclusion statement available to the public?	<input type="radio"/>	<input type="radio"/>
Public information on the demographics of cooperative staff or board members?	<input type="radio"/>	<input type="radio"/>
Report back to members on the status of diversity, equity, and inclusion goals and how progress is evaluated?	<input type="radio"/>	<input type="radio"/>

Thinking about **member empowerment**, does your cooperative ...

	No	Yes
Educate members about how to communicate with the board of directors?	<input type="radio"/>	<input type="radio"/>
Provide ways for members to communicate their concerns outside the annual meeting?	<input type="radio"/>	<input type="radio"/>
Provide all members information about how to participate in the governance of the cooperative, including running for the board of directors?	<input type="radio"/>	<input type="radio"/>

Thinking about **community services and outreach** at your cooperative, does your organization ...

	No	Yes
Donate to community power building efforts?	<input type="radio"/>	<input type="radio"/>
Partner with other organizations building community power?	<input type="radio"/>	<input type="radio"/>
Sponsor public events about building community power?	<input type="radio"/>	<input type="radio"/>
Advocate for policies to build community power?	<input type="radio"/>	<input type="radio"/>
Use other strategies to build community power?	<input type="radio"/>	<input type="radio"/>

What **other strategies** does your cooperative use to build community power?

In the next five years, how important is **improving** diversity, equity, and inclusion to your cooperative?

- Not at all important
- Slightly important
- Moderately important
- Very important
- Extremely important

For the next five years, does your cooperative have specific **organizational goals** related to ...

	No	Yes
Diversity, that is the representation of all our varied identities and differences?	<input type="radio"/>	<input type="radio"/>
Equity, that is air treatment, equality of opportunity, and fairness in access to information and resources for all?	<input type="radio"/>	<input type="radio"/>
Inclusion, that is building a culture of belonging by actively inviting the contribution and participation of all people?	<input type="radio"/>	<input type="radio"/>

Are any of these goals reflected in your cooperative's strategic plan?

- No
- Yes

In the next five years, does your cooperative plan to pursue any of the following goals related to diversity, equity, and inclusion?

	No	Yes
Adopt a board statement related to diversity, equity, and inclusion	<input type="radio"/>	<input type="radio"/>
Track demographics of cooperative staff or board members more systematically	<input type="radio"/>	<input type="radio"/>
Increase staff diversity	<input type="radio"/>	<input type="radio"/>
Expand education about diversity, equity, and inclusion within the cooperative	<input type="radio"/>	<input type="radio"/>
Increase board diversity	<input type="radio"/>	<input type="radio"/>
Increase member diversity	<input type="radio"/>	<input type="radio"/>
Actively support vendors owned by historically marginalized groups	<input type="radio"/>	<input type="radio"/>
Communicate the cooperative's commitment to diversity, equity, and inclusion more effectively	<input type="radio"/>	<input type="radio"/>
Actively support groups and policies building community power	<input type="radio"/>	<input type="radio"/>
Other goals	<input type="radio"/>	<input type="radio"/>

In the next five years, what **other goals** related to diversity, equity, and inclusion does your cooperative plan to pursue?

In mid-2021, NCBA CLUSA and CDF will convene a professionally facilitated, cross sector **peer learning group** to help cooperatives advance their efforts around the [ABCs of Co-op Impact](#).

In particular, the group will explore research-based best practices related to (D)emocratic governance and empowerment; (E)quity, diversity, and inclusion; and the (F)inancial security and advancement of workers. It will also examine how cooperatives can be used to advance power-building and social and economic equity among low-income communities and communities of color.

Participating cooperatives will meet virtually from June 2021 to September 2022 to hear outside speakers, share information, and develop recommendations for the broader field. The group will also lead a meeting around these themes in conjunction with the October 2022 Cooperative Impact Conference.

How interested is your cooperative in participating in the peer learning group?

- Not at all interested
- Slightly interested
- Somewhat interested
- Very interested
- Extremely interested

Thank you for your interest in the peer learning group! Please list the contact information for up to two people at your cooperative we can follow up with about this opportunity.

- Name 1 _____
- Title 1 _____
- Email 1 _____
- Phone 1 _____
- Name 2 _____
- Title 2 _____
- Email 2 _____
- Phone 2 _____

The next questions are about characteristics of your cooperative. Because this survey is part of a national study, we would like to be able to compare your answers with those of similar organizations. **No individual cooperative will be identifiable in the final results.**

Which **one** of the following best describes the sector of your cooperative?

- Agriculture
- Education or childcare
- Financial services such as credit union or farm credit
- Healthcare or home care
- Housing
- Manufacturing
- Mutual insurance
- Retail such as grocery
- Services such as restaurant, cleaning, or consulting
- Transportation
- Utility such as rural electric, water, waste, or telecommunications
- Other

Thinking about who owns your cooperative, which **one** of the following best describes your cooperative?

- Consumer
- Multi-stakeholder or hybrid
- Producer
- Purchasing or shared services
- Worker
- Other

How many consumer members does your cooperative have?

What are the membership categories in your cooperative? How many of each type of member does your cooperative have?

How many producer members does your cooperative have?

How many business or organizational members does your cooperative have?

How many worker-members does your cooperative have?

How many members does your cooperative have?

Gross revenue is the total amount of sales recognized for a reporting period, prior to any deductions. In 2020, what was your cooperative's gross revenue?

Total assets are the combined amount of a company's fixed assets and current assets as recorded in the company's balance sheet. In your most recent audited financial statement, what were your cooperative's total assets?

In total, how many **units** does your cooperative have?

Total overhead costs are the ongoing business expenses not directly attributed to creating a product or service. In the most recent completed fiscal year, what were your cooperative's total overhead costs?

Gross actual wages and salaries are the total dollars spent on worker wages and salaries in the previous fiscal year. In 2020, what were your cooperative's gross actual wages and salaries?

Which **one** of the following best describes where your members are predominantly located?

- Mostly in urban or suburban areas
- Mostly in rural areas
- In a mix of urban, suburban, and rural areas

In terms of race and ethnicity, how would you describe the diversity of your members?

- Not at all diverse
- Slightly diverse
- Somewhat diverse
- Very diverse
- Extremely diverse

What **decade** was your cooperative founded?

- 2010s
- 2000s
- 1990s
- 1980s
- 1970s
- 1960s
- 1950s
- 1940s
- 1930s or prior

What **year** was your cooperative founded?

In this last section, we ask questions about you. These background questions are for statistical purposes only and **no individual will be identified in the final results**. You can skip any question you prefer not to answer.

Thinking about your current job, which **one** of the following best describes your role in the cooperative?

- CEO or general manager
- Member of the board of directors
- Human resources staff
- Diversity, equity, and inclusion officer
- Other type of role

About how many years have you worked in this cooperative? If you have worked here for less than 1 year, enter zero.

How would you describe your role in efforts related to diversity, equity, and inclusion at your cooperative?

We would like to be able to contact you if we have questions about your answers. If we may follow up with you as needed, please list your contact information.

- Name _____
- Title _____
- Email _____
- Phone _____

Is there anything else you would like to share with us about diversity, equity, and inclusion efforts in your cooperative?
