



Center for Cooperatives  
UNIVERSITY OF WISCONSIN-MADISON

# 2022 ANNUAL REPORT

# ABOUT UW CENTER FOR COOPERATIVES

The University of Wisconsin Center for Cooperatives (UWCC) is a trusted and unbiased voice on the cooperative business model serving the needs of cooperatives in Wisconsin and beyond. With a strong public service orientation and access to world-class university resources, we leverage research, education, and outreach capabilities to foster critical thinking and understanding about cooperatives. As the only U.S. university-based center that studies and supports all forms of cooperative business, UWCC provides valued education and research to a diverse range of communities.

## Advisory Committee

UWCC benefits from the guidance of an advisory committee. Comprised of cooperative and university leaders, the committee members provide valued counsel on UWCC's education, outreach, and research initiatives.

- Margaret Bau, USDA Rural Development
- Matthew Brandrup, Rural Electric Supply Cooperative
- Terri Dallas, Genex
- Jim Dell, Alcivia
- Anya Firszt, Willy Street Co-op
- Kimberly Frederickson, Organic Valley/CROPP
- Lizzy Haywood, People's Food Co-op
- Mark Huth, MD, Group Health Cooperative SCW
- Jaimes Johnson, UW Credit Union
- Jeff Lyon, FarmFirst Dairy Cooperative
- William Nelson, Ralph K. Morris Foundation
- Ole Olson, Isthmus Engineering and Manufacturing
- Daniel Smith, Cooperative Network
- Mike Wade, Central Wisconsin Electric Cooperative
- Monica White, UW-Madison

## Our New Home

We are excited to announce that in January 2023, UWCC moved to the UW-Madison Division of Extension, Institute of Community Development. Extension's mission is to connect people with the University of Wisconsin. The Extension Institute of Community Development provides educational programming to assist leaders, communities, and organizations realize their fullest potential. UWCC's values and programs align closely with Extension's mission and embody the Wisconsin Idea. Our research informs our education and outreach efforts; our relationships with new and established cooperatives guide our research questions and outreach programs; and our cooperative development efforts create sustainable enterprises that improve the lives of Wisconsin residents.

UWCC's move to Extension is mutually beneficial—UWCC will have a secure home in a division that shares our values, approach, and public service orientation; and Extension will gain a center with strong stakeholder support and a track record of delivering highly valued research, outreach, and education to cooperatives across the country.

## 2022-2024 Strategic Plan

In July 2021, UWCC gathered for a strategic planning retreat and identified the following goals for 2022-2024:

- Goal 1: Build and sustain mutually beneficial partnerships with targeted UW affiliates to further education, outreach, and research initiatives that strengthen the cooperative community.
- Goal 2: Grow and leverage our specialized skills and highly curated tools and resources to strengthen existing cooperatives and facilitate the creation of viable cooperatives that meet emerging community needs.
- Goal 3: Develop a research agenda that is tightly integrated with the Center's outreach, education, and cooperative development work and that positions the Center as a leader in cooperative thought and practice.
- Goal 4: Challenge ourselves and others to advance equity and justice through internal practices and in the communities we all serve.



**Center for Cooperatives**  
UNIVERSITY OF WISCONSIN-MADISON



**Extension**  
UNIVERSITY OF WISCONSIN-MADISON

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# CELEBRATING 60 YEARS OF SERVICE TO COOPERATIVES



UWCC is the oldest university-based cooperative center in the nation. Over the past 60 years, UWCC has evolved into a center with an ambitious, high impact portfolio of cooperative development programming, community outreach and education, applied research, and on-campus teaching. Like the cooperative model, UWCC has stood the test of time! Here are some highlights from the last 60 years!

**Did you know the UW Center for Cooperatives was called the International Cooperative Training Center (ICTC) when it was established in 1962?**

Inspired by the Humphrey Amendment to the Foreign Assistance Act of 1961, the ICTC trained over 2,000 cooperative leaders from nearly 100 countries in its first decade. Seminars ranged from two to 20-week intensive training programs on the cooperative model. Every course incorporated significant field experience to complement classroom instruction. The course work included cooperative philosophy; legislation; the importance of cooperatives to both agricultural and economic development; adult and extension education; cooperative organization and structure; public relations and communication strategies; and cooperative management, finance, and marketing.



The first graduating class of the Cooperative Seminar in 1963.

**Did you know that for decades UWCC maintained a world-renowned cooperative library?**

The ICTC also started a specialized library covering all aspects of cooperation and related subjects. One of the first additions to the library was 5,000 books, pamphlets, and periodicals from the Rochdale Collection. ICTC had a professional librarian on staff who developed the collection and assisted students, visiting cooperators, and faculty with accessing the materials. In the seventies and eighties, UWCC continued to grow the collection, hiring a bibliographer to produce an annotated bibliography of books in English on cooperatives and having the collection catalogued by the Library of Congress. In 2021, materials from the collection were integrated into the UW-Madison Library System to make the materials more broadly accessible to the public. The newly catalogued materials were attributed to the "Torgerson Cooperative Collection."

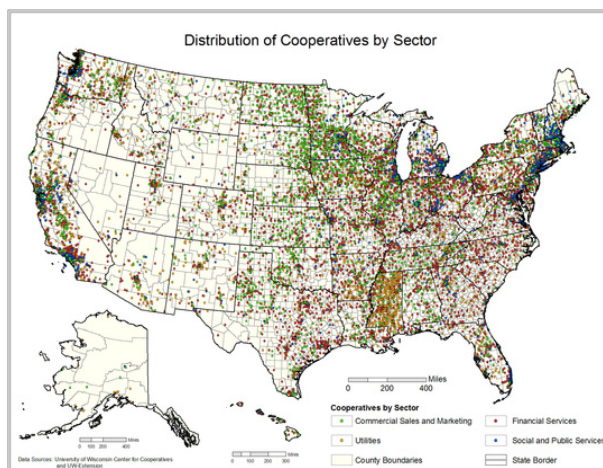


Cooperators from all over the world traveled to visit the cooperative library.

**Did you know that UWCC spearheaded the first and only census of U.S. cooperatives in 2007?**

The project, Research on the Economic Impact of Cooperatives, also led to the creation of one of the Center's best-known products, a map of U.S. cooperatives. The research catalogued nearly 30,000 cooperatives operating at 73,000 places of business throughout the U.S.

In 2015, UWCC continued its efforts to better understand the cooperative economy through mapping with an interactive map that connects people with cooperative resources in their communities. The National Cooperative Resource Ecosystem map highlights factors that contribute to new cooperative development such as cooperative development assistance, legal context, and co-op friendly capital.



Map of cooperative locations across the United States.



# RESEARCHING THE COOPERATIVE MODEL



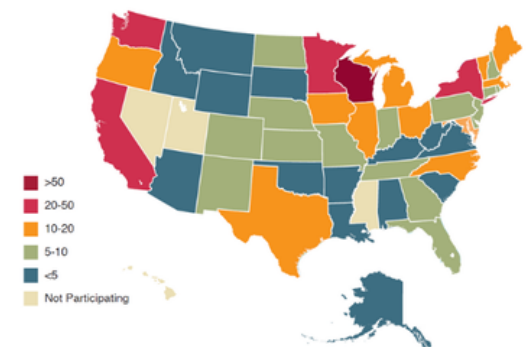
## Cooperative Governance Research Initiative

In 2021, UWCC launched the Cooperative Governance Research Initiative (CGRI) with the ambitious goal of generating data that empowers cooperatives across sectors to reflect upon and improve their governance structures, processes, and culture. Our first CGRI survey yielded enthusiastic responses from 500 cooperatives, capturing substantial diversity in terms of industry, type, size, age, and location and creating a baseline for the range and frequency of cooperative governance practices across sectors. In 2022, UWCC shared the report on the 2021 Findings from the Cooperative Governance Research Initiative with the cooperative community.

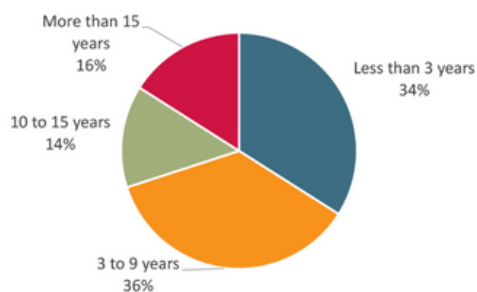
The 2021 CGRI survey focused on the following research question: what is the scope and prevalence of specific governance practices across the cooperative community related to:

- board composition and qualifications
- board nominations and elections
- board training, education, and development
- board meetings and decision-making practices
- board compensation
- the CEO
- member participation
- board culture

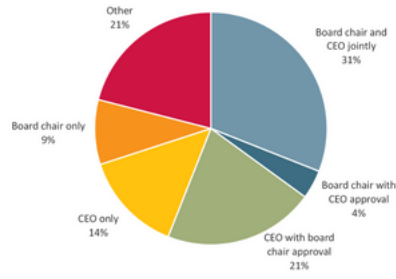
### Participating Cooperatives by State



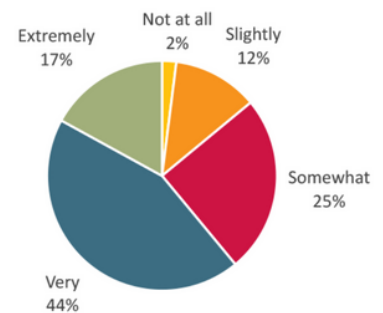
## Sample Findings



Tenure composition of average participating cooperative board



In the past 12 months, who has set the agenda for board meetings?

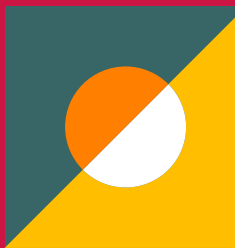


How well do board discussions allow for healthy dissent?

## Gender Diversity on U.S. Cooperative Boards

The business case for gender diversity in the boardroom is clear—boards with a broad range of skills and backgrounds that represent diverse stakeholders make better decisions. Previously, we knew anecdotally that some sectors of the cooperative community struggle to diversify, yet there was little data on the gender composition of cooperative boards.

In the Gender Diversity on U.S. Cooperative Boards research brief, we present novel data about the gender composition of cooperative boards from the 2021 CGRI survey of cooperative enterprises. The 483 survey participants that reported the gender identity of their directors provided the first baseline data of its kind, laying the groundwork for cooperatives to benchmark gender diversity on the board in relation to their sector, others in the cooperative community, and investor-owned firms. The research and report was funded with a 4W Innovation Grant from UW-Madison's 4W Initiative.



# DEVELOPING NEW COOPERATIVES

UWCC provides assistance to new and emerging cooperatives and to businesses interested in converting to employee ownership. In 2022, we worked with cooperatives from a wide range of industries including but not limited to meat processing, custom wood and paper product manufacturing, food service, doulas, and veterinary medicine.

## Wisconsin Cooperative Feasibility Grant Program

In 2022, the Wisconsin state budget included \$200,000 annually to help fund cooperative feasibility studies in Wisconsin. UWCC worked with the Wisconsin Economic Development Corporation and Cooperative Network to create a grant program to disburse grants to co-ops exploring expansion and groups exploring cooperative start up in Wisconsin. The [Wisconsin Cooperative Feasibility Grant Program](#) is designed to support the success of current and future cooperatives by allowing them to explore all facets of their business before large investments are made.

## Studying Tribal Cooperative Development Efforts in the U.S. and Canada

UWCC is a partner on a project funded by U.S. Department of Agriculture's National Institute for Food and Agriculture's Tribal College Research Grant Program. The research project includes a comparative study of Tribal cooperative development in the U.S. and Canada and analysis of the factors associated with success or failure. We concluded the pilot research project and are analyzing the data to create a tribal cooperative development resource.

## Worker Co-op Development in Madison

UWCC is also a key partner in the [Madison Cooperative Development Coalition](#) (MCDC), the City of Madison's program to develop worker cooperatives. MCDC is an initiative to form worker cooperatives that address income inequality and racial disparities by creating living-wage and sustainable jobs. In June, MCDC released a [Program Report](#) highlighting achievements over the last four years. Accomplishments to date include:

- Disbursed \$150,000 in grants to cooperatives in development and \$250,000 to community-based organizations.
- Incorporated 10 start-up cooperatives providing a variety of services, including bookkeeping; community health; mobile bike repair and delivery by bike; cooperative housing development; and racial equity training.
- An additional four start-up or co-op conversions are receiving technical assistance to become worker co-ops.
- Developed partnerships for financing options for worker cooperatives, including a revolving loan fund with Shared Capital Cooperative and a matching loan fund with Kiva, a global crowdfunding platform.
- Supported community partners, such as Worker Justice Wisconsin, Nehemiah, MadWorC, gener8tor, and Collaboration for Good, to strengthen the local cooperative ecosystem through co-op education, technical assistance, and grant funding.



Madison Mayor Rhodes-Conway visits Isthmus Engineering and Manufacturing, a worker-owned cooperative.

## Developing Rural Cooperatives

UWCC provides assistance to new and emerging cooperatives or businesses interested in converting to employee ownership. Through the Rural Cooperative Development Grant from the U.S. Department of Agriculture, UWCC provides technical assistance to groups forming new co-ops, businesses converting to a cooperative structure, and established co-ops in rural areas. Types of assistance available include organizational development, cooperative education, board training, strategic planning, and support during feasibility and business planning activities. Key project areas include food and agriculture; forestry; green energy; and the promotion of employee ownership.



# EDUCATING THE NEXT GENERATION OF COOPERATORS

## Campus Education and Partnerships

Every year, UWCC offers a comprehensive class on cooperatives. The course, Cooperatives and Alternative Forms of Enterprise Ownership, explores why cooperatives and other user-owned enterprises emerge, who they serve, how they differ from other forms of enterprise, and the ways in which they can be used to address social, economic, and environmental challenges.

While there is no formal degree program on cooperatives at UW-Madison, UWCC supports graduate and postdoctoral fellows with an interest in cooperatives with academic guidance, mentorship, access to cooperative documents and data, and industry connections to facilitate graduate research. Additionally, UWCC staff support students from the UW Law School who are interested in the cooperative model, and have worked directly with the Law & Entrepreneurship Clinic to support cooperative clients and develop cooperative legal resources. In 2022, UW-Madison law student and the 2021 recipient of UWCC's Barbara and Tom Lyon Scholarship, West Foster, worked with cooperative attorney, David Rosebud Sparer on guidance on 501(c)(3) Status for Housing Cooperatives.



UWCC Executive Director Courtney Berner on her way to teach the co-ops class.

The CHS Foundation awarded UWCC an education grant to increase understanding of the cooperative model amongst UW-Madison students and equip graduates with the skills and knowledge they need to thrive as members and employees of cooperatives. The project will survey and convene a focus group of leaders from Wisconsin's agricultural cooperative ecosystem to hear directly from Wisconsin's agriculture and farm credit cooperatives about the skills and knowledge they seek in future employees and board members. The information collected will be used to identify and develop cooperative-related material for key courses in the Department of Agricultural and Applied Economics.

UWCC is fortunate to partner with affiliate faculty across campus that are conducting research initiatives relevant to cooperatives and the cooperative economy. In 2022, UWCC collaborated with UW-Madison's Innovate Network which serves as a hub for campus-based organizations to foster a strong culture of innovation and entrepreneurship; and to strengthen the connection between campus and the entrepreneurial network in the Greater Madison community.

## Scholarships

The UW Center for Cooperatives and the UW School for Human Ecology awarded scholarships to graduate students to pursue research, outreach activities, or further knowledge related to cooperative businesses. The scholarships honor Dr. Ann Hoyt and Barbara and Thomas Lyon. Dr. Hoyt is internationally recognized for her innovative research and contributions to co-op education. Thomas Lyon was an agriculturalist, a cooperator, and a former University of Wisconsin Board of Regents president. Established in 2013, the Barbara and Thomas Lyon Scholarship Fund supports graduate students with an expressed interest in cooperative business.

The Farmer Cooperatives Young Leaders Scholarship Program provides Farmer Cooperatives Conference scholarships to students with an interest in agribusiness and cooperatives. Since 2018, 38 scholarship recipients have attended the conference to learn about and interact with leaders from agricultural cooperatives. The program is made possible through the generous support of the Renk Agribusiness Institute, the Ralph K. Morris Foundation, and the William and Harold Moy Young Leaders Scholarship Fund.

"The Farmer Cooperatives Conference was an eye-opening event for me. Throughout the conference I had the opportunity to make numerous interactions with agribusiness leaders."

-Breanna Cisketti, Freshman, UW Platteville, majoring in Agricultural Business



# EDUCATION AND TRAINING FOR COOPERATIVES

## CCMA 2022

In June, grocery cooperative leaders from across the United States and Canada gathered in person and online for the Consumer Cooperative Management Association's (CCMA) first ever hybrid conference. This year's theme, *Rooted: Renewing our Cooperative Identity*, acknowledged the social, political, and ecological crises that have left many feeling uprooted. It challenged cooperatives to grow a more diverse, connected, and thriving cooperative community through their deep cooperative roots. The annual national conference for grocery cooperatives was hosted by UWCC along with Sioux Falls Food Co+op, Natural Abundance Food Co-op, and Breadroot Natural Foods Co-op. CCMA brought together 400 food co-op leaders from 73 cooperatives to discuss pressing issues and innovations. The conference featured 25 breakout sessions from cooperative peers sharing lessons learned and strategies for the future, two engaging plenary sessions, and co-op tours hosted by the Sioux Falls Food Co+op highlighting the co-op competitors and local businesses that are lifting up others.



Patrick Sayler, General Manager of Sioux Falls Food Co+op, welcomes fellow cooperators to South Dakota.

## Farmer Cooperatives Conference



UWCC's Courtney Berner welcomes Farmer Cooperatives Conference attendees.

After two years of virtual programming, the 25th Annual Farmer Cooperatives Conference returned to downtown Minneapolis, MN, at the end of November. Many attendees braved a Minnesota snowstorm to hear from their cooperative peers on topics such as the current state of labor in agriculture; strategies for attracting and retaining talent; the strategic use of technology and data; examining non-member business and its implications cooperative patronage, equity, and governance; and telling your cooperative story.

## Cooperative Director Training

In January, UWCC partnered with Dr. Michael Boland from the University of Minnesota to deliver training for agricultural cooperative directors in southern Minnesota. Training topics included written contracts for general managers and CEOs; the role of the balance sheet in the 21st century; board policy manuals; and current trends in energy and their impact on a cooperative's energy portfolio.

In December, UWCC hosted the Co-op Directors 101 training at Compeer Financial in Sun Prairie, WI. This training is designed for new directors or directors who have not received formal board training. We had a full house with directors from many types of co-ops and sectors including grocery, housing, meat processing, agriculture, veterinary medicine, transportation, solar, manufacturing, and dairy!



Co-op Director 101 attendees work at their tables reviewing how their co-op implements the seven co-op principles.

## Employee Ownership Conversion Training

In May, UWCC partnered with the Wisconsin Center for Employee Ownership on a webinar titled, Employee Ownership: A Business Succession and Retention Strategy. The webinar featured representatives from employee owned businesses who shared their personal experiences with the business conversion process and the benefits and challenges of employee ownership.

