



The Rural and Co-operatives Secretariat

Policy Forum on Co-operatives

Proceedings

**March 23-24, 2010
Ottawa, Ontario**

Purpose of this Document

This document is intended as a record of the discussions that occurred during the Policy Forum on Co-operatives held on March 23-24, 2010 at the Lord Elgin Hotel in Ottawa, Ontario.

These notes will be used by Agriculture and Agri-Food Canada's (AAFC) Rural and Co-operatives Secretariat as a first step in a process to develop federal policies that will contribute to the overall environment in which co-operatives develop and grow.

About this Forum

This forum was organized by AAFC's Rural and Co-operatives Secretariat as the first in a series of dialogues to provide an opportunity for input and suggestions towards shaping the Government of Canada's policy contributions to the overall environment in which co-operatives develop and grow.

The workshop was divided into six parts

- Part 1: Opening Remarks and Setting the Context
- Part 2: Emerging Trends, Opportunities
- Part 3: Challenges and Public Policy Solutions
- Part 4: Vision Elements
- Part 5: Priorities for Moving Forward
- Part 6: Next Steps and Closing Remarks

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Executive Summary

This document is intended as a record of the discussions that occurred during the Policy Forum on Co-operatives held March 23rd and 24th, 2010 at the Lord Elgin Hotel in Ottawa, Ontario. This forum was organized by Agriculture and Agri-Food Canada's (AAFC) Rural and Co-operatives Secretariat (RCS) as the first in a series of dialogues to provide an opportunity for input and suggestions towards shaping the Government of Canada's policy contributions to the overall environment in which co-operatives develop and grow. The focus of the forum was to explore how to better enhance the capacity necessary to support co-operative innovation in Canada and in doing so, facilitate the building of an environment conducive to co-operative development and growth.

37 participants attended the forum representing a wide range of sectors such as national organizations, provincial associations, financial institutions, consultants, and co-operatives themselves.

The Honourable Jean-Pierre Blackburn, Minister of Veterans Affairs and Minister of State (Agriculture), provided welcoming words on the evening of the 23rd to kick off the forum. In light of the United Nation's recent announcement that 2012 will be the International Year of Co-operatives, he is looking forward to the results of this session and the development of a policy framework that champions co-operatives in Canada. To begin the 24th, Ms. Donna Mitchell, Executive Director for RCS, welcomed participants and thanked them for taking the time to share their knowledge and expertise about co-operatives and what environment would better support their development. Mr. Christian Fortin, Strategic Policy and Network Development Manager for RCS, continued by highlighting some of the key points from the discussion paper that had previously been circulated to participants. The paper reviewed the three main themes of the meeting: community-based economic development, social innovation, and environmental practices. Mr. Fortin invited participants to suggest public policy interventions that are within the scope of influence of the federal government that could better support the development of co-operatives in Canada.

After the initial presentations, participants engaged in four rounds of discussions. Each discussion began in smaller table groups; highlights from those discussions were shared in a plenary before moving to the next round. Each theme was discussed in both French and English.

Participants identified emerging trends in today's socio-economic climate. These included overcoming dependence on fossil fuels, addressing issues related to the changing demographic, encouraging local investment and employment opportunities, and providing goods and services in regions and communities of need. It was widely agreed that the co-operative business model provides solutions that benefit the economic, social and environmental development of communities and the country.

Participants also identified existing obstacles that could prevent the adoption of the co-operative model and the types of public policy interventions required to help overcome those obstacles. Participants offered a wide variety of suggestions for public policy interventions. These included measures to strengthen the legal and regulatory framework for encouraging the development of co-operatives, and mechanisms for capitalizing and financing co-operatives and stimulating co-operative investment. Participants also spoke of the need to improve public understanding and awareness of the co-operative model, including co-operatives' social, environmental and economic impacts.

Suggested Actions

To conclude the day, participants identified actions that were necessary for co-operative development and growth over the next ten years. The following are actions that were suggested:

- Develop a co-operative investment strategy with a continuum of tax credits and incentives designed to foster the capitalization of co-operatives.
- Initiate the Co-operative Development Fund starting at \$70 M.

- Have a permanent and expanded Co-operative Development Initiative (CDI) program.
- Establish policy that prevents the demutualization of co-operatives that receive public funding.
- Bring together all public servants who are currently working on co-operative development in a department with an economic focus (such as Industry Canada) in order to separate co-operatives from rural and agricultural development or develop an independent Co-operatives Secretariat.
- Create an interdepartmental committee comprised of federal departments with a view to consider the multi-dimensional character of co-operatives (i.e., economic, social and environmental).
- Develop and implement a public relations campaign and education program to increase awareness of the co-operative movement.
- Develop a national branding program with defined criteria.
- Develop a data capturing and analyzing component via Statistics Canada whose purpose would be to track and measure key indicators regarding economic, social and environmental impacts of co-operatives.
- Organize a federal, provincial, territorial (FPT) summit to promote a comprehensive range of development and incentive programs to encourage the use of the co-operative model.

Next Steps

This document represents the views, suggestions and ideas of the participants at the policy forum. The policy forum began the conversation with stakeholders to establish public policies that will support the development of co-operatives across Canada. The Secretariat is currently analyzing the proceedings and preparing a summary report. This will also be distributed to participants and used to prepare for further dialogues with other government departments and other stakeholders over the Spring and Summer of 2010. The goal of RCS is to confirm and launch key Secretariat priorities by the Fall of 2010 in preparation for the 2012 International Year of Co-operatives.

Section 1: Background and Context

1.1 Opening Remarks

Ms. Donna Mitchell, Executive Director for AAFC's Rural and Co-operatives Secretariat (RCS), welcomed participants and thanked them for taking the time to share their knowledge and expertise about co-operatives and what environment would better support their development.

In light of the recent announcement that 2012 will be the International Year of the Co-operative, the Secretariat organized this Policy Forum as a first step towards identifying how the federal environment and federal policies must change to better support co-operatives across the country.

Ms. Mitchell explained that the Secretariat is seeking to develop a public policy environment that is more conducive to co-operative development and growth. To enable this, the Rural and Co-operatives Secretariat is engaging its stakeholders in a series of dialogues; this Policy Forum being the first session of the series. The purpose of these dialogue sessions is to enable a public discourse and obtain input for the development of federal policies that will enable sustainable growth for rural communities and co-operative businesses. The Secretariat is looking forward to gathering innovative ideas from the specialized knowledge of its stakeholders that will benefit co-operatives and Canadians.

In closing, Ms. Mitchell acknowledged the work of her staff in preparing today's Policy Forum. With the added interest and commitment of Minister Blackburn and in preparation for 2012, she noted that the timing was ideal to hold these discussions. She encouraged participants to put forth solutions that would help the Secretariat make progress towards building a workplan that is supportive for the development of co-operatives in Canada.

1.2 Setting the Context

Mr. Christian Fortin, Policy Manager for the Rural and Co-operatives Secretariat (RCS), explained the value of passion and co-operation as well as the need for bringing diverse groups of people together to collaborate on identifying feasible solutions to co-operatives' challenges.

After sharing a personal story about how social networking, co-operation and a shared passion has enabled him to successfully deal with an issue, Mr. Fortin emphasized that those in attendance today are part of a network that shares a common passion and interest in co-operatives. Together, they have the required knowledge, expertise and resilience to identify solutions that will lead to tangible results. In order to achieve those results, the network must share its knowledge and work collaboratively to identify solutions.

Moving toward 2012, there are many issues that will require communities to adapt themselves and become more resilient as they deal with changes. These issues fall into three categories:

- **Economic.** Co-operatives are more relevant than ever given the current economic situation. The recent economic crisis has made it more challenging to create sustainable businesses and employment. The co-operative model provides mechanisms to engage individuals in the economic development of their regions and to identify and develop solutions to unemployment within communities. There are many successful examples of co-operatives creating employment.
- **Social.** With a rapidly aging population and other social changes in Canada and elsewhere in the world, new approaches which consider our ability to pay for social services will be required. Developing viable goods and services is at the heart of the co-operative mission.

- **Environmental.** Environmental changes are creating new challenges and providing opportunities to innovate in areas where there is a capacity to take action. The co-operative model creates capacities to provide environmental solutions in a variety of situations.

Mr. Fortin explained that a federal framework was required to support the development of co-operative innovation and capacity. The federal government must take into account the role that co-operatives can play in responding to these emerging trends. Developing this framework will require a multi-sectoral approach involving various federal departments and agencies. To that end, Canada will study what other countries have done to create favourable environments for co-operatives, including tax incentives, and modernizing legislation.

The Policy Forum on Co-operatives is the initial step leading to the establishment of such a framework. Over the spring and summer of 2010, the Secretariat will be engaging in dialogues with stakeholders from different sectors and regions as well as engaging other Ministers in the process.

The goals for this first Policy Forum were to:

- Start to articulate what a supportive environment for co-operative development could look like;
- Obtain suggestions on the top priority solutions/actions that are necessary for co-operative development and growth over the next ten years.

In closing, Mr. Fortin emphasized that the suggestions proposed during this forum need to focus on public policy interventions that are within the scope of influence of the federal government.

Note: A copy of Mr. Fortin's presentation is available separately. In addition to the hard copy presentation, participants received a discussion document that provided additional context related to the role co-operatives can play in responding to economic, environmental and social issues.

Section 2: Emerging Trends, Opportunities and the Co-operative Business Model

During this portion of the forum, participants identified emerging trends and opportunities and explained why the co-operative business model should be considered to respond to those trends and how to take advantage of the opportunities. It was widely agreed that the co-operative business model can provide solutions that will benefit the economic, social and environmental development of communities and the country.

The following section summarizes the key discussion points according to the three main themes: environmental practices, social innovation and economic development.

Note: Although each table was assigned one of the above themes to help focus their discussions, many tables identified emerging trends or opportunities for all three themes. Their comments are summarized below according to the corresponding theme and not according to their original table assignment.

2.1 Environmental Practices

- **Privatization of government services and community infrastructure (including communication, waste management, energy, etc.).** As funding for government services decreases, co-operatives are well positioned to provide infrastructure to their communities (environmental services or otherwise), while retaining wealth within their communities. For example, communities spend significant amounts on energy services, which are funds leaving the community. This could be mitigated by establishing local energy co-operatives.
- **Community-owned and environmentally sustainable solutions.** Co-operatives can promote environmentally sustainable energy projects and promote local control of wealth. The co-operative business model offers a viable cost-effective solution that enables communities to take democratic control over how to address their needs. They can help meet underserved needs in a way that is more appropriate to their community. Current examples include a community-owned natural gas line and energy production services. Co-operatives aggregate people and resources to collaborate on projects that are designed to benefit its members.
- **Dependence on fossil fuels.** The current dependence on fossil fuels requires that we rethink how our communities are built and operate to reduce the use of fossil fuels. The co-operative business model can encourage communities and developers to offer alternative energy solutions. Using new sources of fuel is necessary to reduce the impact on the environment and create healthier communities.
- **Collaboration between grassroots organizations and senior leaders.** The co-operative business model provides a better alternative to address issues at the local level by ensuring that those involved are all “owners” of the solution. The model allows people from the community to sit at the same table and develop solutions that will support the adoption of more environment-friendly practices.

2.2 Social Innovation

- **Aging population.** There are several relevant impacts related to the aging population. This point will focus on the social dimension of this trend (more information regarding the economic impacts of

the aging population is included in the next section). As the baby boomers retire, more young retirees will be available and involved in community development activities; however, their interests will be very specific and targeted.

Additionally, there will be an opportunity to develop more socially responsible tourism to meet increasing demand for this service.

- **Immigration.** In Canada, immigration is a critical component of the country's long term economic viability. As the number of immigrants continues to rise, we need to ensure their successful social and economic integration in our communities. Co-operatives can facilitate the social and economic integration of these individuals by providing them with opportunities to join or develop a co-operative. This could enable new immigrants to demonstrate their abilities and increase their opportunities for employment.
- **Deepening poverty.** There is a trend of intensifying poverty in specific geographic locations and demographic groups. Co-operatives can help reduce the level of poverty and economic disparity by getting more people engaged in the labour market and providing meaningful employment and training. They can be tailored to local circumstances. Co-operatives are a proven model for connecting economic development with social objectives; a key to moving people out of poverty.
- **Alternative to urbanization.** Co-operatives are a good means to retain or attract individuals to rural areas by increasing employment opportunities in those areas and by developing eco-villages that will attract individuals who choose to adopt more sustainable lifestyles.
- **Youth.** Co-operatives provide alternatives for youth to be involved in the development of their communities. This comment was mentioned specifically in relation to Aboriginal communities, but applies to youth in general.
- **Disabilities.** There is a growing trend related to social inclusion of individuals with disabilities, but economic inclusion remains a challenge. Efforts to integrate people with disabilities into the economic mainstream are often unsuccessful and so alternatives are needed. Co-operatives can be used as a freestanding model or in partnerships with other businesses and non-profit organizations to create meaningful employment and provide social supports.
- **Healthcare.** The rising cost of healthcare, the aging population and the regionalization of healthcare services are important issues facing communities. Changes in healthcare delivery and governance structures are compromising delivery capacity and reducing local services in some regions. There is disparity in health indicators across incomes and demographic groups. With the aging population, there will be an increased need for health and health prevention services, including at home support. This combined with the possible labour shortages in certain areas will have an impact on healthcare service delivery. Co-operatives can provide an alternative means of addressing these issues.
- **Childcare.** There is a lack of access to affordable childcare services and no universal childcare policy in Canada. Co-operatives provide an alternative means of addressing this issue.
- **Food security, food safety and quality.** There is an increased interest in food, including food security, safety and quality. This is manifested through the emergence of small scale food processors and local food markets, and increased interest in ethical and sustainable production methods. Globalization of the food industry is creating economic challenges for small scale producers in rural areas, including declining production capacity and impacts on long-term food security in Canada.

In addition, the increased cost of food and growing poverty rates are impacting the affordability of goods for many Canadians. Co-operatives are a way for producers to reduce the costs of their inputs and improve market access through the development of local food co-ops.

2.3 Economic Development

- **Current and future recessions.** The most resilient societies are those that have achieved a balance in meeting corporate, social and environmental needs. We are living in a multi-dimensional society where many components are so well integrated that addressing issues from an economic standpoint might not be viable in the long run. Co-operatives offer an alternative that is focused on the triple bottom line, one which equally values economic, social and environmental prosperity.
- **Aging population.** There is an increasing concern related to the lack of preparation for succession of existing enterprises, and the loss of expertise due to the baby boomers retiring. By transforming these traditional businesses into co-operatives, members of the community could jointly own the business and continue offering its services. Joint ownership presents some advantages such as sharing the initial ownership cost, and providing a collaborative and democratic approach to managing the organization. Early warning systems need to be paid attention to in order to identify and address these issues before it is too late.
- **Local investment.** Individuals are more likely to invest in local communities as opposed to large global markets. Co-operatives provide interesting investment opportunities for this to occur.
- **Housing.** Co-operatives can help address issues related to affordable housing (e.g. housing co-ops). Co-op housing has become identified, externally and internally, with affordable housing, which it does not have to be, but is difficult to shift beyond. Additionally, there should be a Federal housing policy integrated across departments.
- **Innovative land management.** Land could be transferred from the market into trust frameworks managed by co-ops. This solution does not only apply to individuals with low incomes, but to other individuals as well.

Note: For additional details related to this discussion, please refer to Appendix C.

Section 3: Obstacles and Public Policy Interventions

Considering the previous discussion on emerging trends and how co-operatives could help respond to key issues, participants identified existing obstacles that could prevent the adoption of the co-operatives model. They also discussed what type of public policy interventions would be required to help overcome those obstacles.

The following section summarizes the key discussion points set out in three main themes: environmental practices, social innovation and economic development. Discussion points that did not belong to one of those three themes appear under “Other obstacles”.

Note: Although each table was assigned one of the above themes to help focus their discussions, many tables identified obstacles and public policy interventions for all three themes. Their comments are summarized below according to the corresponding theme and not according to their original table assignment.

3.1 Environmental Practices

- **Increase availability of capital for environmental co-operatives.** Environmental projects and services tend to be capital intensive business endeavours (e.g. wind energy turbines). Currently, environmental co-operatives have limited access to capital from private and public financing sources.
- **Put in place a regulatory regime that facilitates the development of environmental services.** The government has the monopoly in some sectors such as energy; this prevents co-operatives from developing businesses in those sectors. The government should consider opening those sectors to co-operatives where potential benefits exist.
- **Remove the competitive disadvantages.** Co-operatives that adopt environmental practices can be at a disadvantage and therefore non-competitive. Government regulations need to require that all enterprises adopt environmentally friendly practices so that co-operatives are not disadvantaged when they choose to adopt them.
- **Increase research & development and commercialization funding to support environmental practices.** Co-operatives need to replicate and expand their ideas, not just invent new ones. There should be additional funding to support R&D and commercialization of environmental practices.
- **Co-operatives need a formal recognition or value proposition from government.** Co-operatives need to be formally recognized by the state for their economic and social contributions to society. This should include the environmental services and practices that can be provided by co-operative models.
- **Promote a green economy.** Co-operatives concepts must include concepts of green capitalism that respond to the green economy movement.

3.2 Social Innovation

- **Increase recognition and understanding of the social, environmental and other impacts of co-operatives.** There needs to be a better understanding and increased recognition for the social and environmental impacts of co-operatives. There is a possible issue with how results are measured in government; therefore limiting the recognition for the positive impact co-operatives had (e.g.

capacity building of communities). Good indicators for these impacts must be identified, measured and communicated.

- **Increase public awareness and understanding of the co-op model.** The vast majority of communities lack understanding of the co-op model and how to use it. Also, the general population needs basic information about how to use co-ops effectively. Discussion around the desired goals in communities and how co-ops can help realize them could help raise awareness. There should also be provisions in government programs for funding community capacity and knowledge-building activities. Suggestion that the federal government co-design, along with the co-op sector, start a public awareness and promotion program targeted at citizens and stakeholders.
- **Establish “formal” education about co-operatives.** It was noted that co-operative owners do not necessarily have solid business backgrounds, which makes it more challenging for them to successfully manage their operations. There is currently limited or no information provided about the co-operative model in business programs. Studying the co-operative model should become an integral part of every business and administration program in Canada. It should also be included in programs for professionals such as accountants and lawyers that may provide support to co-operatives. It was also mentioned that formal education about co-operatives should start at the grade school level and in high school. By increasing awareness of effective co-operatives business practices and by providing more training to co-operative owners, there will be a greater chance of success for co-operatives across the country. Partnering with the provincial government and public sector to deliver awareness programs is pivotal.
- **Encourage learning from the provinces strongest in co-operative development.** Over the years, the province of Québec and Nova Scotia have developed interesting models to better support the development of co-operatives in their provinces. Lessons learned from these provinces should be shared and leveraged in other provinces.
- **Create mechanisms to facilitate the transfer of ownership of an organization to its workers.** It is known that workers will perform better in their jobs if they have a stake in the service or product they provide. The government could develop policies or legislation to facilitate the transition from traditional businesses to co-operatives.
- **Keep young leaders in their communities.** There should be a national youth strategy developed to encourage young leaders to stay in their communities by establishing local co-operatives, and to encourage knowledge transfer within the co-operative movement to support those young leaders.
- **Encourage new co-operative development to respond to demographic changes.** The next large co-operative movement will be in the social sector. Co-operatives provide opportunities to respond to the needs of the aging population. The government should consider programs that provide incentive for the development of these cooperatives.

3.3 Economic Development

- **Establish programs for co-operatives on par with programs for SMEs.** Co-operatives need more recognition in and access to federal programs for business capitalization and financing. There should be guaranteed access to and recognition by all federal programs for co-ops. It was also suggested that forms to apply for these programs should provide an option for the applicant to identify themselves as a co-operative (and not only as a business or non-profit organization).
- **Develop Funding Programs.** The government should invest in the development of funding programs for co-operatives, especially for capital funding. These programs could be provided through tripartite arrangements, including the federal government, provincial governments, credit unions and the co-operative sector. These programs should also encourage community investment. If governments invest in co-operatives, the sector will continue to invest in them.

- **Develop a loan guarantee program for co-operatives.** Public policies should be developed to support the development of loan guarantee programs for co-operatives.
- **Tax incentives.** Tax incentives were identified as a great way to encourage the development of co-operatives, to encourage organizations and individuals to invest in co-operatives, and to encourage co-operatives to reallocate dividends to their members. Specific suggestions for tax incentives included a CIP and making RRSPs eligible for CEDIF type credits (as it is done in Nova Scotia), although a wide range of instruments could be used.
- **The co-op sector is weak on investing in new co-operatives itself, and this could be strengthened.** There could be opportunities to work in partnership with government.
- **Recognition for the triple bottom line.** Co-operatives are different from traditional businesses and are not always “not-for profit” organizations. It was suggested that the term “benefit net” organization might best describe co-operatives that seek to make some profit to reinvest back into their co-operatives or for other causes. There needs to be greater recognition of the triple bottom line which balances social, environmental and economic outcomes. In other words, government programs should consider that, when investing in the development of co-operatives, they obtain more than financial benefits.
- **Support national and international co-op activity.** Government policies should provide ways for co-operatives to operate nationally and internationally. The economic prosperity of a large co-operative would benefit the co-operative sector. Existing national co-operatives, like Mountain Equipment Co-op (MEC), should be examined to learn what support mechanisms are needed for national co-operatives and how to ensure that they continue to focus on their members (and not lose sight of co-operative values).
- **Improve our legislative framework.** A better legislative framework is required to support the development of co-operatives. Examples provided included revisions to the Canada Co-operatives Act and legislation that prevents co-operatives from being sold to traditional enterprises if they received government (public) funding or investment; especially non-profit co-ops. These frameworks should continue to encourage the balance between social and economic development.

3.4 Other Obstacles

- **Increase support for co-operatives by government.** There is unequal support for co-operatives across provinces, and the federal government is weak on its support to co-ops. The federal government could help by adopting a coordinating role (see below) and by filling gaps to ensure that communities in all regions have access to a basic level of co-op services. There should be an enhanced federal role with regard to promoting the co-operative model.
- **Federal, Provincial, Territorial Coordination (vertical coordination).** Co-operatives need to have greater visibility across all tiers of government. There should be greater coordination between federal, provincial and territorial governments to support the development of co-operatives (i.e. coordinating funding programs, incentives, capacity development tools, etc.) The run-up to 2012 is a good opportunity to get a strong FPT group established.
- **Strong interdepartmental linkages (horizontal coordination).** A key point that emerged several times throughout the forum was the need for an interdepartmental group to work on the development of public policies and programs for co-operatives.
- **Better position the Co-ops Secretariat within the federal government.** By being a subset of AAFC, the Co-operatives Secretariat is not well positioned and seems to be focused on agricultural co-operatives. Since co-operatives can operate in a variety of sectors, the Secretariat should be

transferred to another department with an economic mandate. It was suggested by some participants that it might be better positioned with Industry Canada.

- **Developing and managing the co-operative sector should be done by the co-operative movement.** There should be a national organization representing the co-operative sector that could work with public authorities to support the development of co-operatives across the country. This approach would be aligned with the values of the co-operative model which requires collaboration and co-operation.
- **Brand the co-operative model and its values for the environment and society.** The current reputation of co-operatives in Canada is weak. Other countries have successfully incorporated co-operatives as part of their economic system by increasing public awareness and developing a brand for the co-operative model that was unique and inspiring.
- **Measure the impacts and recognition of the contribution of co-operatives.** There is a current perception by government that co-operatives are only useful to solve existing problems in communities; in fact, co-operatives can be used to transform communities even if they are not experiencing issues. The value of co-operatives must be better understood and recognized.

Research should be done to measure the impact and contributions made by co-operatives across the country. Specific indicators should be developed to track their ongoing contributions. This information would be useful to increase awareness and buy-in from the public and government organizations.

- **Identify targets and goals.** The government should identify specific quantifiable targets for co-operatives (e.g. 50% of the current SME will be transformed into co-operatives over the next 10 years or co-operatives contribute 10% of the national GDP). The targets can help design appropriate programs to reach those targets and help identify key priorities.
- **Increase understanding of and promote the co-op model to the public and public servants.** The general public and civil servants need to be more aware of, and receive information about, the social and economic contributions co-operatives provide within Canada.
- **Increase the capacity for co-op development.** In addition to providing financial support to co-operatives, programs should be established to help increase the professional infrastructure capacity for co-op development such as technical assistance on establishing co-operative businesses, developing centers of expertise for co-operatives, and training paraprofessionals that can provide useful advice to co-operative owners.
- **Integrate the concept of co-operatives in the education system.** The co-operative model should be taught early in schools to teach the concept of co-operation. In post-secondary institutions, the co-operative model should be taught as a viable business option.

Note: For additional details related to this discussion, please refer to Appendix D.

Section 4: Vision Elements of a Conducive Environment for Co-operative Business Model

4.1 Vision Elements

Participants were asked to imagine that it was 2020 and to identify what has been achieved to create a national environment that is 100% conducive to co-operative development and encourages communities to take full advantage of the co-operative business model.

The following summarizes the key vision elements that were shared.

- There is a stronger, consistent and coordinated vision for co-operatives across all levels of government. Canada has a regional economic development vision and strategy tied to clear and intentional policies about Canadian ownership.
- Government has recognized and embraced the value and multiplier effect of co-operatives, social enterprises and the non-profit sector and has encouraged their development through preferential treatment (i.e., in procurement activities, set asides) and incentives that encourage:
 - Organizations to support the development of co-operatives and that provide technical assistance;
 - Organizations to establish equity pools and loan guarantee facilities;
 - Businesses to convert to a co-operative model; and
 - Investment in leadership building for the co-operative sector.
- A meaningful Co-operatives Secretariat has been established under the appropriate government department with a Minister that has clear responsibilities to support the development of co-operatives.
- Public policies that support the development of co-operatives have been developed and implemented jointly by the government and a strong national federation of co-operatives.
- There is a well-established national brand for co-operatives that is shared across different sectors. The public is embracing and supporting the co-operative business model.
- There is an increased use of co-operatives in various sectors, which has helped close the poverty gap. There is recognition that the co-operative model provides less economic fluctuation and is therefore better at risk mitigation. There are multi-functional co-operatives using a global approach to better serving their rural communities.
- There has been more research conducted to identify the impact of co-operatives. Results of this research are broadly known. There are also indicators used to track the social, environmental and economic impacts of co-operatives.
- There has been a shift in the public discourse and within government that considers Canada's four sectors: private, public, voluntary and co-operative. There is interest in developing private, public and co-operative partnerships.
- There are more professionals (i.e., lawyers, accountants, consultants, business developers, etc.) that understand the co-operative model and that can support the development of successful co-operatives. The co-operative sector is benefiting from intellectual capital of retiring baby boomers.
- A Co-op Development Fund has been launched in 2011 and has grown from \$70 M to \$200 M.
- Co-operatives are eligible for all government business support programs.

- There is a strong national legislative framework supporting the development of co-operatives, which includes provisions for co-operatives that operate nationally, provisions for development of land trusts, and disincentives for the demutualization of co-operatives.
- Co-ops are widely accepted and viewed as a legitimate option for economic development in Canadian communities. People have the knowledge and necessary support mechanisms to develop and maintain co-operatives.
- There is a permanent Co-operative Development Initiative (CDI) that is managed by the co-op sector.
- There are stronger leadership and youth leadership development programs.
- The right accountability frameworks are in place.
- Co-operatives are supporting the government in providing services to the public (e.g., infrastructure, communication, energy, etc.).
- The co-operative model is being taught across the country beginning in grade school and continuing in post-secondary and professional development institutions.
- A larger portion of the country's GDP is realized by co-operatives.

4.2 Current elements to continue leveraging

During this discussion, participants identified what supports were currently in place that would enable the achievement of that vision. They identified the following.

- Current infrastructure including CDI, CCA, CCCM, PA and sector federations.
- Passionate staff from the Rural and Co-operatives Secretariat.
- Benefits from lots of innovative “on the ground” approaches that can be scaled.
- Replication of successful models, like the Community Economic Development Investment Funds (CEDIFs) in Nova Scotia and a similar model in Québec.
- Growing social and environmental conscience.
- Government support for 2012 as the Year of the Co-operatives.
- Emergence of multi-stakeholder co-operatives to support development needs.
- Ongoing research support for co-operatives and social enterprises.
- Existing (but limited) set-asides for co-operatives.
- Availability of micro-credit that provides employment opportunities for immigrants.
- Programs that encourage individuals to invest in co-operatives.

4.3 Proposed Improvements

The following were provided as recommendations to establish an environment that is conducive to co-operative development.

- Increase equity support for co-operatives.
- Expand the Co-ops Secretariat so it operates across multiple departments.

- Develop new legislation and improve existing legislation to better support the development of co-operatives.
- Create incentives that encourage co-operative development and business retention.
- Make CDI a permanent program and ensure permanent government funding for co-operative development.
- Develop tax incentives for co-operatives and develop an investment fund for co-operatives.
- Encourage development of micro-credit.
- Explore changing legislation to prevent demutualization of co-operatives that receive government support, particularly non-profits.
- Better inform public servants about the value and contribution of co-operatives.
- Define specific targets that will facilitate the development of co-operatives.
- Recognize co-operatives as a key part of Canada's economy.
- Develop a framework that encourages co-operatives to adopt environmental practices.
- Develop the co-op brand.

Note: For additional details related to this discussion, please refer to Appendix E.

Section 5: Moving to Action and Priorities

At their tables, participants identified their top three priorities that the federal government should focus on from now until the year 2020. The priorities identified at each table were shared in plenary and posted on the wall in chronological order. The following table summarizes the results of this exercise. Additional details are available in Appendix F.

Year	Priorities
2010-2011	<ul style="list-style-type: none"> • Bring together all public servants who are currently working on co-operative development in a department with an economic focus (such as Industry Canada) in order to separate co-operatives from rural and agricultural development OR develop an independent Co-operatives Secretariat. • Create an interdepartmental committee comprised of federal departments with a view to consider the multi-dimensional character of co-operatives (i.e., economic, social and environmental). • Initiate a public relations campaign and education program to increase awareness of the co-operative movement. • Conduct research on the survival rate of co-operatives. • Develop a data capturing and analyzing component via Statistics Canada whose purpose would be to track and measure key indicators regarding economic, social and environmental impacts of co-operatives. • Implement a co-operative public relations campaign and education awareness program. • Develop a tax incentive program.
2012	<ul style="list-style-type: none"> • Develop a co-operative investment fund (starting at \$70M) that supports co-operatives at three different stages: start-up, development, and capacity-building through professional technical support. • Organize a federal, provincial, territorial (FPT) summit to promote a comprehensive range of development and incentive programs for co-operatives. • Make the Co-operatives Secretariat and CDI permanent programs and expand their mandates. • Establish a national branding program. • Research the contribution of co-operatives as key economic, social and environmental drivers (conducted by an independent and credible verification board like the Conference Board of Canada). • Research various existing structures to identify the similarities and differences between models. • Identify the development needs in various sectors. • Establish a policy that prevents the demutualization of co-operatives that received public funding. • Explore legislation that would prohibit demutualization of co-ops that receive government investment, particularly non-profit co-ops.
2014	<ul style="list-style-type: none"> • Establish a co-op investment strategy which includes a continuum of tax credits and incentives. • Ensure equitable access to funding for co-operatives.
2016	<ul style="list-style-type: none"> • Establish a legislative framework to enable financial and non-financial co-operatives to do business and grow their sector.
2018	<ul style="list-style-type: none"> • Conduct a review of all Canadian and international jurisdictions and develop a co-op value proposition legislation (i.e., social benefits and tax benefits, rights and responsibilities). • Ensure that all administration and commerce faculties offer at least one mandatory course on the co-operative model.
2020	<ul style="list-style-type: none"> • Expand the Co-operative Development Fund to \$200M. • Create a modernized and harmonized legislative framework. • Encourage grade schools to adopt a curriculum which promotes co-operative education.

Section 6: Next Steps, and Closing Remarks

In his closing remarks Mr. Christian Fortin thanked the participants for their contributions, their generosity and ideas. Participants were told that they would receive a thank you letter from Minister Blackburn, along with a copy of the meeting report capturing the key elements that were discussed at the forum.

Mr. Fortin reminded participants that this forum was the first step in a series of dialogues aiming to establish public policies that will support the development of co-operatives across Canada. The Secretariat will review the key themes that were discussed during this forum and prepare for further conversations with other government departments and other key stakeholders over the spring and summer of 2010. He noted that the Secretariat might reach out to them over the next few months to obtain additional details regarding the key strategies that were proposed today. The overall focus of the exercise is to develop a comprehensive workplan by the fall for 2011-2012.



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Appendix A: Participants

Name	Organization
Anderson, John	Canadian Co-operative Association (CCA)
Appleby, Candice	Small Scale Food Producers Association
Arsenault, Ronald	Co-opérative de nature et de tourisme d'aventure connectée à la terre (CONTACT)
Beachy, Tim	United Community Services Co-operative
Berchmans, Jean	Réseau de développement économique et d'employabilité de l'Ontario (RDÉE) (Replacement for Martine Plourde)
Boissonneault, Marie	Fédération Desjardins
Bridault, Alain	Canadian Workers Co-operative Federation (CWCF)
Cameron, Peter	Consultant specializing in co-operative enterprises
Coker, Cindy	SEED Winnipeg
Downing, Rubert	Social Economy Hub
Driscoll, Mike	Consultant specializing in co-operative enterprises
Elliott, Ken	Co-operative Housing Federation of Canada (CHFC)
Gagné, Brigitte	Conseil canadien de la coopération et de la mutualité (CCCM)
Garvie, Marcel	Coop Atlantic
Girard, Jean-Pierre	Specialist for collective enterprises
Guy, Denyse	Ontario Co-operative Association
Heneberry, Jen	CoopZone Developers' Network Co-operative
Herbert, Yuill	Sustainability Solutions Group
Herman, Roger	Centre for the Study of Co-operatives, University of Saskatchewan
Hunter, Carol	Canadian Co-operative Association (CCA)
Lafleur, Michel	Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (IRECUS)
Lang, Cathy	C. Lang Consulting
Lemon, Carolyn	Common Ground Co-operative
Lewis, Mike	Canadian Centre for Community Renewal
Lohmueller, Jens	Community Partners
Lowery, Frank	The Co-operators Group
Martin, André	Institut de recherche et d'éducation pour les coopératives et les mutuelles de l'Université de Sherbrooke (IRECUS)
Morin, Luc	Conseil de la coopération de l'Ontario (CCO)

Name	Organization
Morrison, Andy	Arctic Co-operatives Limited (ACL)
Perron, Gérard	Consultant specializing in co-operative enterprises
Simard, Hélène	Conseil québécois de la coopération et de la mutualité (CQCM)
Sparrow, Mike	Nova Scotia Co-operative Council (NSCC)
Teumo, Victor	Consultant specializing in co-operative enterprises
Tétrault, Louis	Conseil de développement économique des municipalités bilingues du Manitoba (CDEM)
Tully, Glen	Federated Co-operatives Limited (FCL)
Williams, Jennifer	La Siembra Co-operative
Jacquier, Christian	International Labour Organization (ILO)

Appendix B: Agenda

Agriculture and Agri-Food Canada – Rural and Co-operatives Secretariat Policy Forum on Co-operatives

March 23 (evening) and March 24, 2010

**Lady Elgin Room - Lord Elgin Hotel
100 Elgin Street, Ottawa, Ontario**

Provisional Agenda

Purpose

As the first in a series of dialogues initiated by the Rural and Co-operative Secretariat (RCS), the Forum will provide an opportunity for input and suggestions towards shaping the Government of Canada's policy contributions to the overall environment in which co-operatives develop and grow.

Tuesday, March 23

18:30 – 20:30 **Registration / Refreshments (cash bar) & hors d'oeuvre**

19:30 **Welcome and Opening Remarks**

- Donna Mitchell, Executive Director, RCS
- The Honourable Jean-Pierre Blackburn, Minister of Veterans Affairs and Minister of State (Agriculture)

Wednesday, March 24

08:00 – 08:30 **Coffee, Meet and Greet**

08:30 – 08:45 **Welcome and Introductions**

- Donna Mitchell, Executive Director, RCS
- Introductions, Review of the Agenda - Raymonde D'Amour, Groupe Intersol Group

08:45 – 09:15 **Setting the Context**

- Christian Fortin, Manager, Policy, RCS

09:15 – 10:30 **Round Table Conversation 1 - Question for Discussion**

Given the emerging trends and opportunities facing our communities and regions, why should Canadians consider the co-operative business model to respond to these trends? What would impede them from considering or adopting a co-operative response? Which obstacles lend themselves to public policy intervention? (discuss within each of the three thematic)

10:30 – 10:45 **Break**

10:45 – 12:00 **Round Table Conversation 2 - Question for Discussion**

If in 2020, the national environment (public policy interventions, programs, knowledge) was 100% conducive to co-operative development and supported communities to take full advantage of the co-operative business model, what would it consist of? Please be specific.

12:00 – 13:00 **Lunch (served on site)**

13:00 – 14:15 **Round Table Conversation 3 - Question for Discussion**

What supports are in place to increase the capacity for a co-operative response to these trends and opportunities? How could these supports be enhanced? What new supports need to be in place to reach a 100% conducive environment? (discuss within each of the three thematics)

14:15 – 14:30 **Break**

14:30 – 16:15 **Moving to Action: Plenary Discussion and Prioritizing**

Of the ideas explored today, which should most be considered in the developing policy framework (over the next one to ten years)? What evidence is needed to support the implementation of these ideas?

16:15 – 16:30 **Next Steps, Evaluation and Closing Remarks**

Appendix C: Discussion 1 Details

This appendix includes the details that were captured by participants during the first discussion round. Refer to section 2 for a summary of the discussion.

Environmental Practices

Emerging Trend or Opportunity	Why consider the co-operative business model?
Development of energy system in rural communities (There is a desire to secure the supply of resources at the community level).	<ul style="list-style-type: none"> - Retain funds within the community. - Develop companies that reduce GHG emissions (owned by municipality or coop). - Increase buying power of a community when it comes together as a collective.
Dependence on fossil fuels	<ul style="list-style-type: none"> - Offer alternative energy solutions. - Re-think communities to reduce dependence on fossil fuels. - Use of new fuels. - Use of new fuel/carbon sources will promote environmental development that is less harmful to the environment and health.
Communication infrastructure There is an increased need for communication infrastructure.	<ul style="list-style-type: none"> - Provide and invest in communication infrastructure for their community and members.
General infrastructure (including waste management, community owned natural gas lines)	<ul style="list-style-type: none"> - Fill needs where government cannot step in. - Meet under-served needs of their community. - Link energy, waste and heat to create a closed-loop system.
Value Proposition of Co-op Reframe co-op enterprise; set of values, some of profits from all new co-ops goes to a fund	<ul style="list-style-type: none"> - Have a different purpose and therefore different obligations and different advantages. - Formal value proposition of co-operatives is needed to formally recognize the contributions of co-operatives. This was accomplished in Italy under legislation and taxation measures.
Community Development	<ul style="list-style-type: none"> - Allow human resources from the community to sit at the same table and work on the development of energy solutions specific to their community.
Potential privatization of government services	<ul style="list-style-type: none"> - Take these services over from government and still provide democratic control to their members.
Investment by co-operatives in the green economy	<ul style="list-style-type: none"> - Provide decentralized model with more democratic control. - Stabilize investments. - Given the proximity of the co-op model to the communities, it provides a great way for communities to adopt greener technology (and create jobs in their community).

Social Innovation

Emerging Trend or Opportunity	Why consider the co-operative business model?
Aging population (business succession, loss of expertise and corporate knowledge, health/home care)	<ul style="list-style-type: none"> - There will be an increased demand and need for services in health and home care; these services can be offered by new co-operatives. - Opportunity to develop co-operatives that provide environmental and other forms of responsible tourism to respond to new cultural demands. - There is a need for new models of co-operative housing that has a global and multi-functional approach. - Need to consider and reinvent the implications of volunteering within co-ops. - The co-op formula promotes knowledge development within communities (e.g. entrepreneurship as well as other areas).
Immigration There is an increased amount of immigrants that need economic integration into society. There is a challenge to share the co-op concept/model within different cultural groups. The workforce requires immigration to survive.	<ul style="list-style-type: none"> - Offer information sessions and networking opportunities for immigrants (to increase new social acceptance for newly arriving immigrants). - Highlight the capacities (technical or otherwise) of new immigrants to offer possibilities of employment and entrepreneurship. - New traditions of co-operation will help support the integration of immigrants into their communities.
Poverty and Inequality	<ul style="list-style-type: none"> - Create community wealth. - Allow democratic integration for all groups and collective enterprises.
Poverty and disparity There is an intensification of poverty in certain locations and demographic groups. No counter trend to reduce child poverty and weak labour market participation in Canada. Certain segment of society excluded from wage earning. Deindustrialization and thinning of the better paid jobs. Working poor is growing. Recession and deficit reduction measures likely to compound the problems.	<ul style="list-style-type: none"> - Co-ops can provide local solutions to local issues (e.g. chronic poverty from plant closures in a particular community). Solutions need to be tailored to the locality. - There is a need to connect economic development and social services, and to move beyond economic activity as an end in itself. This should be a means to something greater. Co-ops provide a proven model for this (e.g. co-ops in Basque and Emilia Romagna regions of Spain and Italy have successfully combined economic development and social services). - Co-ops can help integrate people in the labour market and provide training. - Co-op model has strengths but is not an alternative to progressive social policy and the social welfare role of the state.
Rural exodus/urbanization There is a shortage of manpower in the rural sector.	<ul style="list-style-type: none"> - Good mechanism to keep labour in rural communities. - A framework is needed to help co-ops integrate into the eco-community movement (e.g. new co-ops in regions minimize public expenditure). - The federal government is well positioned to put in place incentives to counteract rural exodus.

Emerging Trend or Opportunity	Why consider the co-operative business model?
Collaboration between grassroots and senior leaders There is a need for better linkages between organizations.	<ul style="list-style-type: none"> - Grassroots organization and senior leaders / decision makers are working in isolation which creates unnecessary tension. Collaboration between these groups is needed. The relationship needs to be reframed so grassroots organizations feel like owners. - Co-operatives build coalitions.
Youth/Aboriginal Youth It is not only indigenous youth that need opportunities to be included within the development of their communities.	<ul style="list-style-type: none"> - Offer opportunities to the youth to be included within their communities - Try to keep the youth within their communities (instead of youth leaving their homes)
Food Safety and Affordability There is an increased interest in food safety, food security, food quality; demonstrated through the emergence of local food markets and increased numbers of small scale food processors. Furthermore, there are increased concerns related to ethical and sustainable production methods; growing poverty and reduced affordability of goods. Globalization of the food industry has created economic challenges for small scale producers in rural areas; resulting in declining production capacity and long-term impacts on food security.	<ul style="list-style-type: none"> - Development of local co-op markets. A level of co-operation is required between organizations and consumers who want to buy more ethically produced products. The co-operative model lends itself well to this. - Co-operatives are a way for producers to reduce the costs of their inputs and improve market access.
Healthcare Rising costs of healthcare services and the aging population are affecting service delivery capacity and budget base. Regionalization of healthcare is creating large bureaucracies that are not locally sensitive, and resulting in reduction of local services. There are downward tax pressures and reduced transfers to provinces. Marginalization of certain demographic groups with regard to healthcare, and disparity in health indicators across income groups.	<ul style="list-style-type: none"> - Co-operatives can provide alternative service delivery models for health care that better meet local needs.

Emerging Trend or Opportunity	Why consider the co-operative business model?
Disabilities. Social inclusion of people with disabilities has improved dramatically over the past 40 years; the current challenge is economic inclusion. Efforts to integrate into the mainstream economy can result in isolated, low-paying jobs that don't work, so alternatives are needed.	<ul style="list-style-type: none"> - Co-ops can be used as a freestanding model or in partnerships to create opportunities for work and/or to help provide social supports (e.g., a good example is Common Ground co-op in Toronto). - Co-ops formed by groups of families/ community members can provide meaningful employment for people with disabilities and can serve as a way to integrate people with disabilities in our neighbourhoods and communities. - Advocacy and policy for people with disabilities has been towards individualization (i.e., rights as individuals to certain supports). This approach is not necessarily conducive to co-op development (e.g. Registered Disability Funds, which allow families to put money in a trust fund but have limited use and relevance, especially for poorer families).
Child care There is a lack of access to affordable childcare and no universal childcare policy. The old ways may not work anymore for co-ops in this sector.	<ul style="list-style-type: none"> - Quality of care is better when workers have a stake in it. - Offer alternative models to childcare.
Demographic shift – great opportunities for co-ops (i.e. people living longer, not working, have time and energy to support co-ops)	<ul style="list-style-type: none"> - We need to have people working to generate CPP. - Co-operatives offer additional employment opportunities.

Economic Development

Emerging Trend or Opportunity	Why consider the co-operative business model?
New economic model challenging current dogmas. We live in a society of dogma, without putting into question our economic model	<ul style="list-style-type: none"> - Sustainable organizations have a good balance between corporate, public and social, while maintaining equal results between economic, social and environmental results.
Current and future recessions	<ul style="list-style-type: none"> - Co-ops provide an important economical context that will play an important role in economic transition and development. - Co-ops offer a new business model (the triple bottom line).
Aging population and businesses closing due to lack of succession	<ul style="list-style-type: none"> - Early warning system required where provincial associations could help if they had the resources to support the succession and transformation of the organization to a co-op before they go out of business. - Support for inter-generational transition of wealth.
Encouraging local investment Individuals are likely to invest in local communities as opposed to large global markets.	<ul style="list-style-type: none"> - Co-op could provide interesting investment opportunities.
Housing	<ul style="list-style-type: none"> - Offer alternatives to address issues related to affordability of housing.
Land Management	<ul style="list-style-type: none"> - How do we remove land from the market and place it into a trust framework? This solution does not only apply to low income people, but there is an impact on professionals (e.g. nurses) who cannot live in the city where they work due to high prices of homes in that area and who must travel long distances.
De-industrialization and more intellectual goods and services	<ul style="list-style-type: none"> - Combine social objectives with economic development.

Note: It was noted that the discussion paper that was provided in advance of the session should have included the intersection of social, economic and environmental issues.

Appendix D: Discussion 2 Details

This appendix includes the details that were captured by participants during the second discussion round. Refer to section 3 for a summary of the discussion.

Environmental Practices

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
The co-op model is not well understood by the public.	<ul style="list-style-type: none"> - Ensure stronger representation of co-ops in government publications. - Ensure more co-op training featured in academic curricula across the country. - Develop certification programs. - Increase awareness of co-ops. This could be done by re-branding the co-op brand to something that is unique and inspiring.
Lack of access to environmental areas where there is a government monopoly (i.e., some segments of the energy sector in some provinces).	<ul style="list-style-type: none"> - Develop appropriate legislation and taxation regimes that facilitate the development of co-operatives in recognition of their social and economic contributions to society (e.g. Ontario's legislation for sale of energy into the grid, the Italian social co-ops legislation/taxation, the green energy act in Germany includes co-operatives).
Some co-ops are not moving as quickly as the private sector (There are some exceptions of this. Some larger co-ops are implementing environmental measures). Newer co-ops in capital intensive industries.	<ul style="list-style-type: none"> - Increase access to capital for new co-ops for capital intensive environmental projects. - Encourage co-ops to replicate and expand their ideas, as opposed to innovate new ideas so they can benefit from economies of scale. - Provide better sources of R&D and commercialization funding and support for co-ops.
Adopting environmental practices can make co-ops non-competitive	<ul style="list-style-type: none"> - Government regulations need to require all types of enterprises to adopt environmental practices so that co-ops are not at a competitive disadvantage.
Lack of access to capital	<ul style="list-style-type: none"> - Co-operatives have limited access to private and public sources of business financing and capitalization programs; it is especially difficult for co-ops interested in capital intensive environmental projects.
Need branding and global value proposition for co-ops that increase their scale and activities	<ul style="list-style-type: none"> - Set out what the co-op value proposition looks like in co-op related legislation. This value proposition must be recognized and supported by both the co-op sector and government.
Green economy movement The co-op concept is not fully defined as green capitalism.	<ul style="list-style-type: none"> - Integrate the concept of co-operatives into the green economy movement.

Social Innovation

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
Easy sale of co-operatives	<ul style="list-style-type: none"> - Co-operatives have access to federal financing and measures put in place to limit the sale of co-operatives and their assets (e.g. housing co-ops).
The transfer of enterprises to workers for the development of co-ops	<ul style="list-style-type: none"> - Offer tax credits and establish fiscal measures (e.g. Co-operative Investment Plan (CIP) in Quebec).
The public's misconceptions and prejudices of co-ops, especially the model's economic and social functions.	<ul style="list-style-type: none"> - Public awareness and information to create economic and social wealth.
Co-operatives Secretariat is not in a strategic position within the federal government.	<ul style="list-style-type: none"> - Place the Secretariat within a ministry that is more economically oriented.
Lack of recognition of the importance of co-ops within higher levels of government administration	<ul style="list-style-type: none"> - European countries (Italy, Spain and Portugal), provide the recognition of the socio-economic benefits of co-ops within their constitutions.
The co-op movement has control over the development of co-operatives within Canada	<ul style="list-style-type: none"> - Implications of large co-op organizations with public authorities.
The social and economic impact of co-ops is unknown	<ul style="list-style-type: none"> - Recognition of co-operatives' contributions by adopting indicators (e.g. human development index).
Misunderstanding across the country of the contribution co-ops have too many socio-economic issues	<ul style="list-style-type: none"> - The Co-operatives Secretariat has to better understand the contribution of the co-operative model with the federal and provincial jurisdictions.
Risk of straying from the democratic nature of co-ops	<ul style="list-style-type: none"> - Consider the public policy issues.
Lack of awareness and understanding about the co-op model and what it can contribute. The general population needs basic information on the co-op model.	<ul style="list-style-type: none"> - Federal government should co-design with co-op sector a public awareness/ promotion program. - Engage communities in discussions around their desired goals and how co-ops can help meet them. - Create an environment where people think about local engagement and solutions, and identify opportunities for new co-ops. - Use local examples of democratic organization. - Develop programs with capacity building and knowledge building objectives.

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
<p>Weak/ unequal support for co-operatives by government (federal and provincial levels)</p> <p>Federal government is fairly weak with regard to co-ops. There is a wide variation in provinces.</p>	<ul style="list-style-type: none"> - Enhance federal role in promoting the co-op model. - Federal government could work in partnership with co-op sector on programs that will promote the co-op model. - Federal leadership needed to encourage other provinces to fill in gaps and ensure that all regions have a basic level of services. - Federal government could establish a strong FPT group or interdepartmental committee. - More federal partnering with provinces. - Encourage provinces with little co-op support to learn from those that are strong (e.g. Quebec and Nova Scotia).
<p>Capitalization/ financing</p> <ul style="list-style-type: none"> - co-ops don't have access to all SME programs (including financing) - co-op sector weak in investing in co-ops at this stage - Difficulty of capitalizing co-ops, especially smaller co-ops 	<ul style="list-style-type: none"> - Federal, provincial governments and co-op sector, including credit unions, must work together to create investment incentives and facilitate capitalization. - Credit unions could play a more active role in providing financing support. - Develop federal tax measures, such as providing CIP, making RRSP eligible for CEDIF type tax credits or using another means to attract investors to co-ops - Federal government should commit to developing financing instruments that could be used to support co-ops for the next ten years. - Sector will invest if government helps provide incentives. - Minister should work with all federal departments to open up access to SME programs and create a level playing field (in light of the 2012 commitment). - Federal funds dedicated to co-ops.
<p>Young leaders needed; they are leaving rural and going to urban areas.</p>	<ul style="list-style-type: none"> - Support a national youth strategy for cooperative development in Canada. - Encourage knowledge transfer within the movement. - Provide mentoring opportunities for youth.
<p>Communication and coordination issues</p>	<ul style="list-style-type: none"> - Develop strong interdepartmental committee at the federal level (i.e., horizontal coordination) - Develop FPT committees. (i.e. vertical coordination) - Engage co-op sector in the discussions. <p>Note: Run up to 2012 is a good opportunity for a strong FPT group.</p>
<p>Possible issue with how results are measured in government. May miss some key results that co-operatives deliver, such as capacity building of communities</p>	<ul style="list-style-type: none"> - Need better understanding and increased recognition of the social/ environmental/ capacity building contributions of co-ops.

Economic Development

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
Policies	<ul style="list-style-type: none"> - Diversify economy (access the economic capacity supported by co-ops)
Legal framework. Inconsistent policies (finance, support, structure, integrated research that is grounded)	<ul style="list-style-type: none"> - Government should provide targets for the representation of the three sectors in local development. - Ensure a proper place for co-ops within all federal funding and intervention. - To provide indicators of support to co-operatives, which are found in each of their policies (e.g. quantitative targets). - Find the balance for an organization within three sectors and identify targets. Present the co-op model to foster development. To provide as an objective, 50% of SMEs will change hands in the next ten years. - European Union has developed a statute for multi-state co-op corporations.
Education/knowledge	<ul style="list-style-type: none"> - Federal promotion and incentives for education must be put in place for provincial counterparts. - Systematize knowledge. Finance one person to empower an organization, not an extensive study. - Education, understanding of issues, small business, benefits (e.g., South West Ontario). - Teach at all level, all fields, to provide well-rounded education. - Supply of expertise of co-op development is lacking (people need to learn and grow in these new organizational models).
Equalization? Could this be integrated into targets for co-ops? Cohesion between different Ministers and policies	<ul style="list-style-type: none"> - Stop attaching the co-op model to regions (e.g. rural) and go beyond this paradigm to connect to cities and international possibilities. . - Even education cannot be seen and developed under the United Nations resolution 193 (federal governments have to take a leadership role). - Clear federal position for co-operatives. - Move the responsibility for co-ops away from agricultural and relocate within a ministry that is more economically oriented. - Co-op presence on federal and provincial advisory councils and committees.

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
Obstacles: Misunderstanding, wrong perceptions, prejudices within government, (e.g. situated co-ops within agricultural ministry) prejudice within co-ops and their corporate statutes (e.g. the necessity to have a good financial performance for member investment), the implications of defining co-ops as non-profits/socially oriented when there are co-ops that generated large net profits.	<ul style="list-style-type: none"> - Education is needed to reposition co-ops. There is a clear lack of knowledge about the co-op model. Private enterprises have a tendency to use the co-op values/principles without using the model. - It is important to market and position the co-op model.
<p>To change society and the dominant models</p> <p>Co-ops can ask questions of companies beyond the purely financial aspects of profitability</p>	<ul style="list-style-type: none"> - “Autonomous economic models” is the statute needed for co-ops. View co-ops as an important tool for social transformation. (Vision: 10% of the GDP comes from co-ops). - Implement an equal system where the public, private and co-op sector integrate for a productive and necessary result (for example, see successes in local development, environment and innovative research).
Lack of capacity for co-op development	<ul style="list-style-type: none"> - Create incentives for co-ops that give to second tier co-ops (e.g. similar to a model of political donations, 75% refunds, or co-op refunds or tax credits).
Impact of co-ops is not understood	<ul style="list-style-type: none"> - Research capacity supported by federal government; focused on applied research. - Support for means to gather data specific to co-ops to measure impact (social, financial, environmental impacts). - Forums to present knowledge to ministers.
Co-op development not taught in business schools	<ul style="list-style-type: none"> - Funding for co-op scholars, professors. - Co-ops that donate to universities (tax credit). - Portion within business schools. - Co-op content would then be covered in the business school curricula.
Predominance of market based sectors and perceptions of co-ops that they only address failures in market	<ul style="list-style-type: none"> - Reframe market. - Support to reshape and reintegrate social and ecological dimensions into economics. - Support to demonstrate value of co-operative in transition – linked to trends (social-economic).
Co-op model not presented as an option, not well understood by government or business development organizations.	<ul style="list-style-type: none"> - All government documents should provide options to identify an organization as a co-operative (current options often limited to private business or not-for-profit). - Every CF Corporation has to have a co-op development expert, if they receive funding from government. - Position co-ops on equal billing with other models. - Combining efforts of social economy organizations and enabling conversation between players.

What obstacles are in place that could prevent adopting a co-op response?	What would be the type of public policy intervention that could help overcome the obstacle?
Perception that co-ops are too complicated to develop	<ul style="list-style-type: none"> - Need training on co-ops for paraprofessionals and other professionals. - Courses, case studies, templates. - Information in law schools and business schools.
Lawyers, accountants and professionals	<ul style="list-style-type: none"> - Co-op representation on government advisory panels.
Not sufficient access to various forms of capital money Need provincial ministries and departments to be more than registrants. No public policy competency co-ops across departments (weak, visibility, across department)	<ul style="list-style-type: none"> - Tax credits for individuals and institutions to invest in co-ops. - Multi-stakeholder models (Canada wide) and way for sector and organization and worker co-ops to finance equity up front. - Loan guarantees. - Mandated inter-departmental committee that carries impact and support across ministries. - Co-op sector needs own, more prominent location and role to convene and coordinate. - Autonomy of co-op sector to represent urban and rural
Lack of capacity for development regional and in context of needs	<ul style="list-style-type: none"> - Tax credit for development (i.e., "co-op" tax credit) - Federal tax credit for national co-op sector institutions. - Worked to enhance regional capacity. - Business structure of choice for all
Fizzle factor – delays in providing first response lead to assist in momentum	<ul style="list-style-type: none"> - Delays for funding, and responses to applications lead to burnout and slow downs, which lead to even slower development.
Lack of investment of community in own co-op projects (need for education and patient capital)	<ul style="list-style-type: none"> - Loan guarantee program specifically for co-ops. - Worker co-op vehicle to finance equity up front.
Credit unions do not understand the model – not creative in mobilizing local capital	<ul style="list-style-type: none"> - Tax credits as incentives for co-ops to invest (reallocation, patronage, dividends). - Multi-stakeholder model. - Policy to enable credit unions to offer security, loan guarantees (i.e., special category for co-ops – guarantee power).
Guaranteed and equal access to all government funding programs	<ul style="list-style-type: none"> - Explicit mention on forms and in program materials (i.e. "Are you a co-op?") - Educate staff on the co-op model so it is understood and reflected. - Special capital investment for co-ops to reflect their structure.
Need for more research	<ul style="list-style-type: none"> - Better dissemination. - Harness the existing research. - Get the information to the appropriate Ministers.
Weak FPT coordination	<ul style="list-style-type: none"> - PT must be more than just registrars.
Procurement	<ul style="list-style-type: none"> - All government procurement policies should factor in the organizational structure (e.g. social economy organization or co-operative) in order to promote local businesses.
Co-operative representatives	<ul style="list-style-type: none"> - Co-operative representatives are needed on all departmental or Ministerial Committees.

Appendix E: Discussion 3 Details

This appendix includes the details that were captured by participants during the third discussion round. Refer to section 4 for a summary of the discussion.

It is 2020. The national environment is 100% conducive to co-operative development and supporting communities to take full advantage of the co-operative business model. What has been achieved?

(Comments are grouped by themes.)

Increased Collaboration (vertical and horizontal)

- Stakeholder concept is replaced with “partners”. Talk about “co-production” and “co-construction” of policies and program implementation.
- Consistent national, provincial and territorial vision for co-ops.
- A framework is in place to bring together different levels: federal, provincial and regional players.
- Accountability framework is in place
- Creation of an inter-ministerial committee to better position and develop the co-operative movement (recognition).
- Co-ops facilitating government services by having a national infrastructure program supporting roads, telecom, energy solution, small communities, co-ops.
- Recognition and development of partnerships between the public and co-operative sector.
- A forum for dialogue (e.g. inter-ministerial committee) exists for co-operatives. Co-operatives have influence on a revival of globalisation. A strong and well used system for the capitalization of co-ops is established (the selection criteria includes the successful development of co-ops).
- Broader recognition of co-ops as a regular stakeholder in government consultations across all sectors (Agriculture, social affairs, finance, etc.)

Government Recognition for Impact and Increased Support

- Government recognizes need and opportunities for tax incentives for co-op development (and continuum for).
- Established a meaningful respected Co-op Secretariat with a good budget.
- New (secretariat of state)/minister for co-operatives been established.
- Co-op, social enterprise, and non-profit sector are positioned as having impact, legitimacy and influence.
- Government understands multiplier effect of community investment.
- More research in impact of co-ops that is more broadly known.
- Canada has a regional economic development vision and strategy tied to clear and intentional policy on Canadian ownership.
- Co-ops recognized as regular element of the economy.
- Governments recognize co-operatives as one of the most important vehicles for socio-economic development (essential in rural regions).
- Statistics Canada measures the co-operative movement with social economy indicators.
- Co-operatives are the link between co-operation and sustainable development. They are recognized as the best model for sustainable development measures.
- Federal officials that are responsible for co-operatives have moved into an economic oriented ministry such as Industry Canada.

Legislative Changes

- Government procurement policies preference for local and/or social enterprise / key consideration (monitored and enforced).
- Land trusts (e.g. for farmers retiring and selling their land).
- Co-op-legislation (2 classes of co-ops) equity stays in co-op, sector pays tax support, dividends back to members, normal tax laws apply to co-op.
- Legislative disincentives to demutualization / no profit gains to a few for demutualized co-ops.
- National co-op legislation – CUs operate nationally, co-ops are able to operate across provinces.
- All the provinces/territories have sensible legislation for co-operatives (e.g. the prevention of selling co-operatives as seen in Italy).

Supporting Policies and Regulations

- Social enterprise as procurement driver. Preferential treatment for co-ops and social enterprise organization as a means to pursue government objectives using its purchasing power (e.g. procurement, free-trade, set-asides, etc.).
- Policy is supportive of co-op sector, but co-ops have also joined with other like-minded organizations to achieve a common goal (co-ops, social enterprise organisation, civil society organization).
- Policies conducive to the consolidation of professional co-operatives.

Financial Support and Incentives for Co-ops

- Co-op Development Fund launched in 2011 will have grown from \$70M to \$200M.
- Co-ops eligible for all government business support programs.
- Demutualized co-ops – reserves have to go to a co-op develop fund (similar to Italy).
- Tax preferential treatment for a portion of reserves that are not taxed.
- Tax credits and incentives (value of tax credit is well understood as a means of business retention)
 - For development and technical assistance
 - For equity pools and loan guarantee facilities
 - For business conversion to a co-op
 - For investments in leadership building
- Co-op brand recognition = common = co-op capital unit = consolidation of financial services = co-op investment plan with tax incentives (CDEFs)
- Co-ops qualifying for government support as corporate business (i.e. CFCD, BDC, other program). Educate these agencies about co-operatives.
- Provinces/Territories have implemented an adequate support system for co-ops (e.g. Quebec's system of solidarity financing exported to other provinces). Some other examples include: RIC, tax credits and subsidies.
- A tax is implemented to internalize the externalities (2025).

Public Recognition

- Development of a national brand for co-ops – common across different sectors.
- Shift in public discourse and within government to understand that Canada has 4 sectors (private, public, voluntary, co-operative)
- After another recession, recognition that co-op model provides less economic fluctuations and better risk. Members have invested interest in this co-op; focus on regional economic development and community support.
- Most people (citizens) are aware of and involved in the co-op model as a means of achieving their particular goals (on how that can be done).
- The significance (social and economic impact) of the co-op sector is understood inside and outside of government.
- People are aware of and understand social enterprise and why it is a reasonable/desirable approach to development.
- Co-ops are considered real solutions (not only when everything else has failed).

- Society (organizations and individuals) recognize that the products and services of co-operatives contribute to the collective wealth.
- Consumers are buying their products because they come from a co-op business with values and principles that establish ethical buying that goes beyond simply a price.

Co-op Sector Development

- Increased use of co-ops in more sectors.
- A permanent CDI that is managed by the co-op sector.
- There are more co-op developers.
- “We need a benevolent dictator!”
- There is enough strength within the local, regional, provincial, national organizations and federal government.
- Rural co-op development in place.
- Private sector succession to co-op success and also invest in social sector – Blend at CSR and Yield
- 20,000 new co-ops are playing an important role in the success of enterprises in general; this is to say, enterprises are being converted into co-operatives in order to succeed.
- The multi-functional growth of co-operatives has a global approach to communities.
- The co-op movement invests in its own development, complementing efforts from the state.
- There exist many experiences for young co-operators.
- Increased presence of co-op schools (integration of immigrants).

Capacity Building for Co-ops

- More paraprofessionals (lawyers/accountants) who understand co-ops.
- Strong sectoral co-op federation that supports development and after-care support of co-operatives across the country.
- Leadership development across whole sector.
- Informs the education system by being part of the core curricula.
- Stronger youth programs across Canada (e.g. co-op youth camps more robust).
- A national “Youth Program” for co-ops would exist across Canada (Federally supported).
- Third party government program delivery with provincial associations and sector federations developing co-ops, monitoring co-op performance, and collecting data on co-ops (similar to housing agency).
- Co-op sector benefits from intellectual capital of retiring baby boomers and in furthering social economy sector.
- Strong networks within the co-op movement permits professional services (e.g. co-op expertise and human resources).
- Faculties of administration/commerce have at least one course that focuses on the co-operative model. The co-operative perspective is integrated into the education process for children. This exists in Uruguay and Costa Rica.
- Co-ops allow for professional multi-disciplinary organizations that support various aspects of professional development (legal, financial, trade).

Social and Economic Impacts

- Closing on the poverty gap and less income dispersion.
- Co-ops are used as a mechanism to preserve jobs in communities.
- Rural regions are represented by dynamic and innovative co-operatives. This allows better land use, responsible use of resources and collective wealth.
- Co-ops are integrated into the local economy.
- 34% of the Gross Domestic Product is produced by the co-operative sector.
- Take the example of co-operative funeral businesses that had an impact on the standardization and consolidation of the market.
- Pollack Hardware in Winnipeg. Community stepped in and bought the hardware.

- By 2020, there is a co-operative fair trade system within the Americas. A system of international co-operation; co-operative business across the Americas.

What supports are currently in place today that will enable us to reach a 100% conducive environment?

Current Supportive Infrastructure

- We have infrastructure to build off of (CCA/CCCM; PA; Sector Federation).
- CURAs will help us make the case for co-ops.
- Support program like CDI.
- CDI initiative/provides support fund of co-op development.
- We have replicable models (like CEDIFs).
- Provincial level examples of useful models (Québec, Nova Scotia).
- Healthy strong national support organization (e.g., CCA, CCQ, CCEDNet).
- RIC
- Canadian-based international co-op development programs.
- CIP in Québec.
- Capitalization (export the solidarity financing system from Quebec).
- Ongoing co-op and social enterprise research support.
- CO-OP Zone.
- Microcredit for access employment for immigrants.
- Use existing infrastructure to optimize the benefits for co-ops.
- Streamlined – no need to go from sector commission – but needs to increase from \$250K to \$1M (ISCO).

Current Government Support

- Co-ops Secretariat is passionate.
- Current process and willingness to listen.
- Government support for 2012 as year of co-op.
- N.S. co-op investment incentive programs.
- RRSPs
- A friendly minister (and secretariat).
- Existing, but limited procurement (set asides).

Existing Successes of Co-operatives

- Lots of innovation on the ground (but how do we scale up what's working?)
- Established co-op forum based for new movement – incubator support.
- Co-op mechanisms of fund raising (offering statement or promotion in other provinces and territories).
- Successful existing intra-co-op initiatives.
- Emergence of multi-stakeholder co-op as adaptation to newly development needs.

Changes in Public Discourse

- Economic crisis stimulation, co-op support.
- Growing social and environmental conscience.

What could be better?

Legislative Changes

- 2 structure for co-op (equity support).

- Argument could be provision of social, environmental benefit and support for businesses that provide rewards (CSR) across all agencies, not excluding co-ops.
- Holistic approach to govern co-ops (don't apply insurance act)
 - Social economy model (exempt them from limitations of specific acts)
 - 50% rule Energy Act specifically exempts green energy co-ops
 - Financial products and insurance product for all members within co-ops
- Law that prohibits the sale of co-ops.

Government Recognition and Support

- Value proposition for co-ops as social economy businesses.
- Expanded Co-ops Secretariat across all ministries.
- Recognition of co-ops as equally viable form of business.
- Research has evolved and reinforces the principles/values of co-operatives.
- The different levels of government have a policy that supports fair trade commerce by co-operatives that is equal to the policies which regulate the private sector.
- The government has put in place incentives that permit co-ops to invest more into the co-op formula.
- Tax credit to stimulate member investment within their co-operative.
- Federal Co-operative Investment Plan.
- A theoretical environmental framework is accepted and applicable to the co-operative sector.
- Indicators are developed by Stats Can for evaluating the increased impact of co-operatives on the Canadian economy.

Better Infrastructure to Support Development of Co-ops

- Make CDI a permanent program (and grow it).
- Incentives for business retention (using co-ops) and succession (e.g. tax incentives, loan guarantees, etc.).
- Incentives for new co-op business development.
- Recognize micro-credit (work of credit unions).
- Improving inter-departmental infrastructure.
- Federal and provincial policies offer co-op education and officials responsible for co-ops are repositioned under a more economic oriented department.
- Well-defined targets to promote co-operative development to the point of being the third pillar of the economy.
- The co-op brand is developed and stimulates the engagement of consumers.
- An international committee is actively reflecting on co-operative education. The co-op movement is actively reflecting on an international co-op model.

What supports need to be in place to reach a 100% conducive environment?

- Legislation for two co-op structures, predisposition of government to look at various models.
- Tax regulation barriers for blended organizations (charitable status as well as a co-op).
- Explore legislation that would prohibit demutualization of co-ops that receive government investment, particularly non-profit co-ops.

Appendix F: Details from the Prioritization Exercises

This appendix includes the details that were captured by participants during the discussion on priorities. Refer to section 5 for a summary of the discussion.

Year	Priorities
2010 - 2011	<ul style="list-style-type: none"> To separate the co-operative model from simply being viewed as a rural entity, federal officials responsible for co-ops are relocated to a more economic oriented ministry (e.g. Industry Canada), with a mandate to put in place an inter-departmental committee that integrates the economic, social and environmental dimensions of co-operatives. Develop a Co-operative public relations campaign and education awareness program. Investment strategy for co-ops. Research on the survival rate of co-ops in relation to private industry. Indicators on the social and environmental impact of co-operatives. Implement the co-operative public relations campaign and education awareness program. Develop a data capturing and analyzing component at Statistics Canada. Co-operative development fund (co-ops and general public) with three objectives: start-up, development and professional network. An autonomous Co-operatives Secretariat that has achieved and Co-operative Investment Plan and a program for tax incentives.
2012	<ul style="list-style-type: none"> Initiate the Co-operative Development Fund (starting at \$70M). Announce comprehensive range of capitalization programs at a summit (FPT). Announce permanent and expanded CDI approved by Treasury Board. National branding program in place (identify the criteria). Research contribution of co-operatives as key economic, social and environmental indicators (conducted by independent and credible verification board like Conference Board of Canada). Announcement of co-op investment fund instrument (e.g. RRSP, eligible for tax treatment). Research conducted to identify the innovation and successes of the co-op sector, with the results widely disseminated. Identification of the development needs of co-operatives by each sector. A strong national co-ops organization with an asymmetrical model. Research to study the existing structures, models and similarities and differences with co-op sector. At the international summit for co-operatives, a public declaration by government states the initiatives for 2020 as the year that #% of the Gross Domestic Product is generated by co-operatives. An autonomous Co-operatives Secretariat that puts in place a permanent Co-operative Development Initiative (CDI). Federal government announces programs and incentives that will be launched for the development of co-ops. The co-op movement has focused its research priorities.
2013	<ul style="list-style-type: none"> Co-ops must have indivisible reserves to access public funds.
2014	<ul style="list-style-type: none"> Co-op investment strategy with continuum of tax credits and incentives. Functional co-op investment fund instrument (e.g. RRSP, eligible for tax treatment). Equal access to financing.
2016	<ul style="list-style-type: none"> Legislative and operational framework is in place to enable financial and non-financial co-ops to do business and grow their sector.

Year	Priorities
2018	<ul style="list-style-type: none">• Conduct review of all Canadian and international jurisdictions and develop a co-op value proposition legislation (social benefits and tax benefits, rights and responsibilities).• All the faculties of administration/commerce have an obligatory course on the co-op model.
2020	<ul style="list-style-type: none">• Expand Co-operative Development Fund to \$200M.• A Co-ops Secretariat that is autonomous and modernizes and harmonizes co-op legislation and laws.• Primary and secondary schools in Canada have adopted pedagogy that fosters co-operative education (ILO resolution 193).

Appendix G: Summary of Participant Feedback from the Forum

Overall the event was well received and was a success.

80% of the respondents indicated that the meeting venue and logistics were suitable. 95% indicated that the forum provided a great learning and networking opportunity.

Further Comments:

- The participants enjoyed the opportunity to express their ideas in addition to the high level of interaction and engagement during the discussions.
- A majority would appreciate being part of an ongoing consultation process.
- The discussion paper was favourably received.
- Overwhelmingly, it is thought that the event was a good start to a longer process that needs further engagement opportunities.
- Some participants noted that pre-determined ideas influenced the direction of the discussions, thus limiting the depth of discussion of some issues.
- Some participants suggested that there should have been more focus on longer term federal policy and program strategies for co-operatives.