

Report on the 2019-2022 Strategic Plan

CWCF's three Strategic Priorities are:

- I) We seek to engage and strengthen our members.
- II) We seek to build awareness and scale up worker co-ops.
- III) We seek to build the Solidarity Economy.

The focus in this report is on what we have achieved over the duration of our 2019-22 Strategic Plan, organized primarily according to our three strategic priorities and with more focus on the last year. Some of the activities fit in more than one priority area but are placed where they best fit. On occasion, this includes notable activities which occurred after the financial year-end of August 31st, 2022.



Engage and Strengthen Current Members



Engage worker co-op members in a variety of ways; in-person, social media, and conferences.

- Our plans to prioritize in-person connections with members did, of course, have to shift to online due to the pandemic. We hosted a webinar in spring 2020 on various issues to support worker co-ops' response to the pandemic, and then a series of networking sessions for members hosted by the executive director and board members. Various other webinars have been held, including on the [Solidarity Economy Principles](#) and a screening and discussion of the documentary, [Atautsikut: Leaving None Behind](#) about Inuit- and Cree-led co-operatives in Northern Quebec.
- Our telephone check-in campaign last year connected with 21 Worker Co-op members, comprising roughly 38 percent of our membership. We also held a meet-and-greet event during our board meeting in Calgary in June, 2022.
- Since launching in 2019, our [member profile series](#) has run monthly in our newsletter, and has featured most of our worker co-op members, along with a few of our associate members.
- Since launching in 2019, our [blog series](#) has also appeared monthly in our newsletter, exploring a wide range of issues related to worker co-ops.
- The Conferences held since the start of this Strategic Plan have been well received: 2019 in Tatamagouche, NS [Building Resilient Communities – Ecology, Equality, and Workplace Democracy](#) and the virtual 2021 Conference: [Building Better Together](#). In fall 2020, we hosted an [AGM only plus special guest speaker, Dr. Jessica Gordon-Nembhard](#), on *Diversity and Inclusion Aren't Enough*. As part of the commitment to working more closely with the Quebec Regional Federations, in June 2019 we held a

Conference in Quebec City on *Meeting Worker Co-op Challenges* in conjunction with Quebec Federations; it included a recorded keynote by [Noam Chomsky](#).



Improve the Technical Assistance Program including the grants component.

- We increased the maximum amount to \$3,500 for our grants and in recent years have increased our total budget including \$45,000 for this past year. Between 2019 and 2022 a total of 28 co-ops received a Technical Assistance Grant.
-



Build up and strengthen leadership.

- We reviewed CWCF's current practices, leadership development and compensation for volunteers such as board/committee members and conference presenters. Research indicated that CWCF is comparable in terms of compensation for volunteers for similar organizations.
 - Over the past year, staff participated in two online training sessions, one on managing stress during a pandemic and another on anti-racism and anti-oppression.
 - We have added two BIPOC advisor positions to our board, one of which is open and seeking applicants.
-



Recruit new regular members

- Although not yet with a formal recruitment plan, we have continued to attract new worker co-op members. We've drafted a plan for recruiting members for implementation as time allows.
-



Grow the Tenacity Works Investment Fund

- The Fund's Investment Committee and the CWCF Board have decided that the Tenacity Works Fund interest rate can be set within a range of 4 – 8%, depending on level of risk. We seek to grow our Fund's capital once the federal [Social Finance Fund](#) is rolled out.
 - Although only a few will be available, we have decided to offer loans to worker co-ops to replace federal COVID loans, to enable repayment such that the grant portion can be kept.
-



Enhance management skills in worker co-ops

- We launched the Worker Co-op 101 series of webinars (Introduction, Finance, and Governance) and have offered them regularly. We also partnered with the USFWC to offer two webinars in their Co-op Clinic series: Foundations of Workplace Democracy: Tools for Accountability, and Co-op Structure and Decision-Making.
 - We have offered Worker Co-op Management Intensives at our in-person Conferences: in 2019 on Human Issues in a Worker Co-op; in 2022 on Resilient Strategic Planning. Several workshops at the 2021 virtual Conference were on enhancing management skills.
-



Build Awareness and Scale Up Worker Co-ops



Support worker co-op development / Develop a pilot project for worker co-op start-up training and collaboration

- We launched the virtual [Worker Co-op Academy](#) in 2021; it provides training and coaching to start a worker co-op. We translated and adapted it from the [Parcours COOP](#) program of the Quebec Réseau COOP. The first cohort with three groups completed the program last fall. The second cohort is now about one-third of the way into the program, which is now taking place over 10 months.



Promote and demonstrate the value of the worker co-op model

- This has been done through our member profiles, blog posts, and social media.



Engage in federal and provincial lobbying on worker co-op interests

- We have carried out a federal lobby effort for a large worker co-op conversion and development project, “Building Community Resilience.”
- A current focus is on various tax incentives which could have a significant impact on worker co-ops. Most notably: having any tax and other incentives accorded to Employee Ownership Trusts also made available to worker co-ops.
- Lobbying around improving and continuing the federal Social Innovation / Social Finance Program is being carried out under the leadership of the [People-Centred Economy Group](#) with the support of CWCF.



Build the Solidarity Economy



Increase racial justice in the worker co-op movement (an addition to the Plan)

- CWCF’s [Racial Justice Action Plan](#) has been developed by the JEDI (Justice, Equity, Diversity and Inclusion) Committee and is being implemented.
- The Racial Justice session at the 2021 Conference which was planned by the JEDI Committee was excellent, supported by very positive feedback on our evaluation.
- CWCF’s application to the federal EcoSystem Builders program was approved for just under \$50,000 for a project to do promotion /networking re: conversions to co-ops in BIPOC communities and other equity-seeking groups.
- We have also added two BIPOC board advisor positions and launched our racial justice granting/bursary program.



Collectively collaborate with solidarity economy organizations

- Collaboration continues with the PCE Group (People-Centred Economy Group, hosted by CCEDNet), and the JEDI Committee (see above).
- CWCF has recently committed to the [Solidarity Economy Principles](#).



Other CWCF Strategies and Activities



Communicating our strategic plan

- The Communications Team meets regularly. We developed and regularly update our communications plan. This plan provides objectives, strategies and tactics for our social media, newsletter, and website communications.
- CWCF's website was enhanced significantly at the start of the current strategic plan and is being continually improved.



Running and promoting registered plans program through administering RRSPs and TFSAs

- This Program, which supports community investment in qualified co-ops, CED Investment Funds, and non-profits, ceased growing during the pandemic. We decided to promote it. It was recently rebranded as "Common Good Capital: CWCF's Registered Plans Program". Program staff have made a couple of presentations about Common Good Capital. Indications are that it will be growing in the new year.
- The behind-the-scenes bare trustee with whom we work informed CWCF that it will eventually cease offering these services, so we have investigated other options. We have identified one, though we are first trying to work with a different trustee which is in the co-operative sector.