

10:15 a.m. Break

10:45 a.m. Françoise Morissette, continues

11:45 a.m. Lunch

COOPERATIVE EDUCATORS' ROLE IN SHAPING SUSTAINABLE ORGANIZATIONS

INTRODUCTION BY ROD KELSAY, ACE DIRECTOR

12:45 - 1:45 p.m. Creating a Sustainable Strategy
Jim Hoyt, Vice President, Strategic Planning and Corporate Services, GROWMARK, Inc.



GROWMARK

Jim provides management direction to GROWMARK's strategic planning efforts and the Corporate Communications and Marketing Services, Human Resources, Government Affairs, and Flight Operations business units. He serves on the boards of Interprovincial Co-operative Limited (IPCO), a Canadian interregional cooperative; ACDI/VOCA, an international cooperative development organization; and the Iowa FFA Foundation.

Jim holds a B.A. in marketing. He has served on the board and executive committee of the Canadian Co-operative Association, and was the 2001 recipient of the "Cooperative Spirit Award" for Outstanding Contributions to CCA. As a volunteer with VOCA (Volunteers in Overseas Cooperative Assistance), he assisted agricultural businesses in Poland to restructure through cooperative development.

Jim was raised on a diversified farm in northeast Iowa. He is a former Iowa FFA state president, an AIC/NICE youth scholar, and an alumnus of the Graduate Institute of Cooperative Leadership.

In today's business climate, the quality of your cooperative's direction may be the most important work of your board of directors and management. Providing added value to your members is one of the key principles of cooperation, but it doesn't happen without thoughtful planning. This session will offer insight into the essentials of strategic planning and how to use them in developing a sustainable strategy for your cooperative. It will also focus on the role a cooperative educator can fulfill in a disciplined process. You will be given tools and a concept that are currently in use and can be adapted to fit your needs. If you plan to attend, be sure to know your cooperative's mission statement.

1:45 - 2:15 p.m. Break

INTRODUCTION BY SYLVIA RIOS ORTIZ, ACE VICE PRESIDENT

2:15 - 3:15 p.m. Creating a Sustainable Leadership Team
CUSOURCE® Credit Union Knowledge Network's **Reverend Alisdair Smith**, B.A., M.A., National Learning Facilitator



One of the most sought after speakers and workshop leaders in credit unions and cooperatives across Canada, Alisdair brings wisdom, experience and humor to his practice. He studies, works and teaches in human creativity and development related to leadership, governance, and ethics. Alisdair teaches and designs programs for CUSource. He teaches Leadership and Teamwork at the Masters level as guest lecturer at St. Mary's University in Halifax, and at The Vancouver



School of Theology. Alisdair is Deacon and Business Chaplain at Christ Church Anglican Cathedral in Vancouver. He is also certified in Managing Organizational Transition by William Bridges & Associates (Mill Valley, California), certified as a Leader for Business as Unusual and The Employee Workshop for Organizational Change by Price Pritchett & Associates (Dallas), and a Trainer in Team Building by The Lead Group (Chicago).

Join Alisdair Smith, National Learning Facilitator for CUSource, as he challenges and provokes us to consider "Sustainable Leadership." What might sustainable leadership look like, what might a sustainable leadership team behave like, what might its characteristics be and very importantly, how might we develop it in ourselves and in those we educate? This interactive session will provide new academic and practical perspectives, and learning exercises designed to build sustainable leadership in your organization and in the organizations we serve.

INTRODUCTIONS BY JESSICA GORDON NEMBARD, ACE DIRECTOR

3:15 - 4 p.m. Knowing What Counts
Laurie Mook, Director of the Social Economy Centre of the University of Toronto



Laurie has degrees in accounting, international development, and education. She was a Social Sciences and Humanities Research Council of Canada doctoral fellow at the Ontario Institute for Studies in Education of the



University of Toronto. As part of her research, Laurie has taken the lead in designing accounting statements that are appropriate for organizations with a social mission. One such adaptation is the Expanded Value Added Statement that illustrates the impact of the organization upon the surrounding community and the effects of the organization on an array of stakeholders.

This presentation brings together the concepts of sustainability and social accounting, and encourages you to make direct connections between sustainability and co-operatives through social accounting tools and processes. The role of co-operatives and co-operative educators in educating for sustainability will also be discussed.

4 - 4:30 p.m.

Governments Sustain Cooperatives

- **LeAnn M. Oliver**, USDA Rural Development's Deputy Administrator for Cooperative Programs
- **Christine M. Burton**, Director, Rural Policy and Strategic Development, Co-operatives, Policy and Research



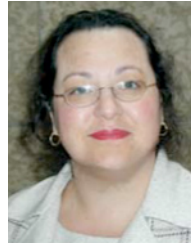
LeAnn has served as USDA Rural Development's Deputy Administrator for Cooperative Programs in Washington, D.C., since October 2006. She is responsible for delivery of programs and services to agricultural and other cooperatives serving rural America. Programs include Value Added Producer Grants and Rural Cooperative Development Grants. In addition, she also supervises the dissemination of research and other information related to the renewable energy industry and its effects on



rural America, as well as overseeing the agency's Empowerment Zone/Enterprise Community program and other projects related to community development.

LeAnn holds a Masters Degree in Public Administration with a concentration in public finance from State University of New York at Albany; and a Bachelor's degree in political science from Willamette University in Salem, Oregon.

LeAnn will be speaking about the research review effort underway by USDA Rural Development and will also discuss future activities related to cooperative education publications.



Christine re-joined Agriculture and Agri-Food Canada as Director of Rural Policy & Strategic Development in April 2006, having served the Government of Manitoba as Assistant Deputy Minister of Rural Economic Development and Co-operative Development from March 2002 to December 2004, and as Assistant Deputy Minister of Strategic Initiatives from December 2005 to March 2006. In July 2008, Christine also assumed the role of Director, Co-operatives Policy & Research.

While Assistant Deputy Minister in Manitoba and also responsible for Cooperative Development, she oversaw the expansion of provincial outreach and programming. She was an advisor on rural, agricultural and cooperative issues to the Premiers of both Saskatchewan and Manitoba.

Christine received a B.A. in political science and history from the University of Regina. She has an LL.B. from the University of Saskatchewan and pursued a joint Masters in Public Administration at the Universities of Winnipeg and Manitoba.

This presentation provides information about the lay of the land of cooperatives in Canada, as well as the role of the Federal Government in promoting sustainability – economic, social, environmental and organizational – in the cooperative sector.

4:30 - 5 p.m.

Wrap up, and preview of Mobile Learning Sessions on July 31

5 - 5:30 p.m.

ACE Annual Meeting

6:30 - 7 p.m.

Reception
Pearson Foyer

7:15 - 10 p.m.

ACE Banquet and Awards Ceremony
Pearson Room



THURSDAY ♦ JULY 31
Pearson Room

6:45 a.m.

Breakfast
Registration

INTRODUCTION BY COLETTE LABEL, ACE DIRECTOR AND PAST PRESIDENT

7 - 8:45 a.m. Desjardins' Sustainability Program
Patrice Camus, ecoconsultant, Mouvement Desjardins

9 a.m. - 4:30 p.m. Mobile Learning Sessions
Two choices of tours — St-Albert/Embrun and Ottawa
(see description of Mobile Learning Sessions)

Participants have dinner on their own



FRIDAY ♦ AUGUST 1
Pearson Room

7 a.m. Breakfast
Registration

THE SUSTAINABILITY CHALLENGE FOR COOPERATIVES

8 - 8:20 a.m. Observation on Mobile Learning Sessions and introduction to Friday's program

8:20 - 10:15 a.m. Attracting the Next Generation
COORDINATORS: **Cathy Statz**, Wisconsin Farmers Union, and **Robin Puga**, University of Victoria

PANELISTS:

- **Rizick Rosario Peña**, Manager, Departamento de Servicios Educativos, Cooperativa de Seguros Múltiples de Puerto Rico
Cooperative Education for the Very Young
- **Tanya Gracie**, SNHU student Post-secondary Programs in cooperative related programs
- **Kathryn Foulds**, Canadian Co-operative Association, Ottawa Youth Action Plans
- **Tom Pierson**, Executive Director, NASCO
Young Cooperator engagement
- **Robin Puga**, British Columbia Institute for Co-operative Studies
Reinventing Cooperatives

Question and Answer Session



Cathy coordinates a variety of cooperative education programs for Wisconsin Farmers Union members, their children and the general public, including the WFU Summer Camp Program at Kamp Kenwood, and the National Farmers Union College Conference on Cooperatives.

She grew up on a dairy farm near Sauk Prairie, Wisconsin, where she was active in the WFU youth and summer camp program. She received the Farmers Union Torchbearer Award in 1991 and served on the NFU Youth Advisory Council in 1992.

Cathy holds a Bachelor of Arts degree in English (with Secondary Level Education Certification) and a Bachelor of Music degree in Voice Performance from Lawrence University in Appleton, Wisconsin, and is the 2006 recipient of Lawrence University's Nathan M. Pusey Young Alumni Achievement Award.

In 1997, she completed the National Cooperative Business Association's Future Co-op Leaders program in Washington, D.C., and participates in the New Visions, New Ventures cooperative discussion group in the Twin Cities (Minneapolis/St. Paul). She has been a member of ACE since 1997, and was named the 1999 recipient of the ACE William Hlushko Award to Young Cooperative Educators. She is now an ACE director.



Robin earned his Bachelor of Science with distinction from the University of Victoria where he specialized in Software Engineering. In 2000, Robin founded a web development company specializing in affordable Open Source web solutions, providing non-technical users with the ability to update their own websites. Robin joined BCICS in 2002 to help enhance the Institute's information technology facilities. He has since designed and implemented its recent online projects, including the Co-operative Learning Centre.



In 2006, Robin began co-hosting the radio program Each For All: The Co-operative Connection, an educational program focusing on cooperatives and social economy organizations. He is also coordinating a new volume of Youth Reinventing Co-operatives about youth cooperatives around the world.



Rizick graduated from the Universidad de Puerto Rico in 1993 with a degree in cooperatives. In 1996, she earned a Master's degree in library and information sciences. She is also certified by the Insurance Institute of America, and has been recognized for her cooperative spirit and contributions as an employee.



Since joining *Cooperativa de Seguros Múltiples* in 1993, she managed various offices throughout the island of Puerto Rico. In 2005, she became the manager of the cooperative's education department. Rizick is also a director of ACE.



Tanya is at the Canadian Co-operative Association for the summer. Previously, she spent eight months working as a Co-operative Development Intern with the Ontario Co-operative Association.

Tanya graduated from Wilfrid Laurier University in June 2007. While completing her undergraduate degree she spent summers working with GROWMARK in university relations, career development and human resources. She is now pursuing a Master's degree in Community Economic Development through Southern New Hampshire University. Between her academic experience, professional experience and personal interests, Tanya has also become involved in the Social Economy Student Network, the Youth Advisory Group for the Canadian Commission for UNESCO, and in June, became a director of the Canadian Association for Studies in Cooperation.



Kathryn was introduced to the cooperative sector when she was hired as a summer research assistant at the Canadian Co-operative Association (CCA) in 2007. A recent graduate from the history program at the University of Ottawa, Kathryn used her research and analytical skills to examine the rich history of the Canadian cooperative movement and develop a strategy to celebrate CCA's 100th Anniversary in 2009. Kathryn was given the opportunity to continue working on the project in



December through the Ontario Co-operative Association internship program and will remain at CCA until the fall of 2008 when she will leave the organization to commence teachers college at the University of Ottawa.



Tom resides in Ann Arbor, Michigan and works as the Executive Director of NASCO (North American Students of Cooperation).

He began his cooperative career in 2000 as a member of worker co-op Hard Times Cafe in Minneapolis. He served on steering committees for forming the Federation of Workplace Democracies in Minnesota and U.S. Federation of Worker Cooperatives; and had a hand in organizing a Midwest Worker Cooperative Conference in Madison. In 2006, Tom received the



William Hlushko Award for Young Cooperative Educators for his efforts developing worker cooperative educational programs.

10:15 - 10:45 a.m. Break

10:45 a.m. - 12 p.m. Sustaining Research and Education

COORDINATOR: **Christina A. Clamp**, School of Community Economic Development, Southern New Hampshire University

PANELISTS:

- **Brent Hueth**, University of Wisconsin Center for Cooperatives — *Assessing the economic impact of cooperatives*
- **Mike Boland** — *Using the Web to link students and cooperatives*



Cooperative Specialist **Christina** has served on the board of the National Cooperative Business Association since 2000.

Since 1994, she has been active on the board of the ICA Group, a developer and technical assistance provider to employee owned and worker cooperative businesses. She is chair of the board of the Cooperative Development Institute in Greenfield, Massachusetts. She also serves as the treasurer on the board of the Allston Brighton Community Development Corporation, Boston. Previously, she served on the board of Northeast Cooperatives, Brattleboro, Vermont. She was clerk of the Childspace Development and Training Institute Board, a national replication program for sectoral development to create and re-design jobs held by primarily low-income women in the field of childcare using a worker cooperative model.

Christina earned her bachelor's degree from Friends World College where she first studied cooperatives in the American South, India and Central America. She went on to complete her M.A. and Ph.D. in Sociology at Boston College where she studied worker cooperatives and employee ownership. Her doctoral research was on the management of the Mondragon Cooperative Corporation.



Brent is the Director of the University of Wisconsin Center for Cooperatives and Associate Professor in the Department of Agricultural and Applied Economics. He received his Ph.D. in Agricultural and Natural Resource Economics from the University of Maryland, College Park. Prior to joining the University of Wisconsin, Brent spent two years at the University of California Berkeley as a Research Economist, and then eight years at Iowa State University as Associate Professor in the Department



of Economics. His research and teaching focuses on cooperative organizations and agricultural markets. He is the Principal Investigator of a large-scale USDA-funded research project to measure the incidence and economic importance of cooperative activity nationwide. This research is expected to generate the most comprehensive inventory to date of U.S. cooperative firms, and will serve as a unique resource for researchers seeking to understand, critically evaluate, and improve cooperative performance.



Mike is a professor of agricultural economics and associate director of the Arthur Capper Cooperative Center at Kansas State University where he has teaching, research, and continuing education responsibilities in agribusiness management strategy. He has received numerous national, university, and college teaching awards and was

recently selected as the 2008 National Association of Land Grant Universities USDA National Agriculture and Food Excellence in Teaching award. He is president-elect of the Western Agricultural Economics Association.

Mike has co-authored more than 50 case studies on agribusinesses. He served as co-chair of the USDA National Food and Agribusiness Management Commission and in May 2008, was appointed Chair of the USDA International Agribusiness Task Force whose charge is to look at ways to incorporate competitiveness and trade topics into agribusiness management curriculum at land grant universities. He also serves as the faculty advisor and case writer for the Executive Seminar on Agribusiness and is an instructor in strategy at the International University of Ecuador in Quito.

He took his Ph.D. in agricultural economics from Purdue University specializing in marketing, production, and strategic management.

INTRODUCTION BY JAMES WADSWORTH, ACE DIRECTOR

12 - 1 p.m.

Show and Tell Lunch
Dr. Bernard Gélinas,
COOP SANTÉ AYLMEYER HEALTH COOP

The Aylmer Health Co-op is a multi-stakeholder venture between citizens, doctors and health professionals created to improve community health care services within the Aylmer sector of the City of Gatineau, Quebec. The cooperative is owned by close to 9,000 members, and became the owner of the Aylmer-Lucerne Medical Center in 2004.

OPEN MIC — Participants are invited to speak about their work or research.

1:00 - 1:45 p.m.

The Equity Challenge

David G. Barton, professor and director of the Arthur Capper Cooperative Center at Kansas State University



David is Professor and Extension Agricultural Economist in the Department of Agricultural Economics at Kansas State University. Prior to coming to K-State, David completed his Ph.D. studies at Purdue University and was a faculty member in the Department of Agricultural Economics at Cornell University.

He has served as a director on the Kansas Cooperative Council (KCC) Board of Directors since 1985 and as chair of the KCC Education Committee since 1986. In 2008 he helped organize and was appointed President of Agricultural Cooperative Employment Services, Inc. (ACES). ACES is a cooperative organization formed by agricultural cooperatives in the United States to assist them in the recruitment, selection and development of employees interested in living and working in rural areas.



Sometimes the survival and sustainability of cooperatives is an essential resource to the community, and educators have a key role to help boards understand this. David Barton recommends using the discipline of Balance Sheet Management at the co-op level and acknowledging that stakeholders have conflicting interests (as customers, owners, patrons and members) at the stakeholder level. Furthermore, a strong balance sheet is essential as is having a profitable business. Boards should make decisions on other important financial issues, such as revolving cooperative equity, based on balance sheet management and profitability.

INTRODUCTION BY ROGER HERMAN, ACE DIRECTOR

1:45 - 2:30 p.m.

Building a Tax Policy Framework to Sustain Cooperatives

Monica Juarez Adeler, Ph.D. Candidate, Centre for the Study of Co-operatives, University of Saskatchewan, Winnipeg Inner-city Research Alliance, University of Winnipeg



Monica, originally from Argentina, completed a law degree at the Northeast National University in Corrientes before moving to Spain, where she did a Master's of Business Administration and completed the course work for a Ph.D. in electronic commerce at the School of Law, University of Santiago de Compostela.



Planning to go into practice in that country, she embarked on another law degree in Spain, which she completed in 2004 at the University of Alicante. After a couple of years in Germany, circumstances lured her to the University of Saskatchewan, where she is currently a Ph.D. candidate in interdisciplinary studies (law, commerce, and cooperatives). Since July 2007 she has been living in Winnipeg, Manitoba where she's doing an internship at SEED Winnipeg on favourable policies to support co-op development in the province.

Monica's research identifies effective tax policy models and strategies of policy advancement for the cooperative sector. It draws on a comparative analysis of tax models from Spain (i.e. Mondragon Co-op) and Italy (i.e. Emilia Romagna region), and scans tax policy and legislation regarding cooperatives in Manitoba.

2:30 - 3 p.m. Break

INTRODUCTIONS BY JESSICA GORDON NEMBARD, ACE DIRECTOR

3 - 4:15 p.m. Making Environmental Sustainability Part of Your Cooperative

- **Paula Anderson**, B.A., M.Sc., Manager of Waste Reduction and Sustainable Business Programs, Peterborough Green -Up
- **Russ Christianson**, M.I.R., B.Comm., Rhythm Communications



*Peterborough Green-Up is a non-profit environmental organization working toward community sustainability in the Greater Peterborough Area. **Paula** has been instrumental in the development of many innovative community sustainability tools such as the Sustainable School Peterborough Program — focusing on waste, water, energy and greenspace conservation, a regional on-line reuse and recycling guide, green shopping guide and a sustainability audit tool and workshop series for small to medium businesses.*



She has an undergraduate degree in environmental science and community development as well as a Master's of Science degree in sustainable systems design. She also brings with her first hand experience using sustainability principles in her own small farm enterprise — Sun Root Organics Market Garden. She shares her time with Trent University where she is a course instructor in the Emphasis on Food and Agriculture Program, in the Department of Environmental and Resource Science/Studies.



***Russ** is the President and founder of Rhythm Communications. He has a broad range of experience in strategic positioning, market research, feasibility studies, business planning, management systems, facilitation, and multi-stakeholder consultations. Russ is the developer of Whole Systems Feedback, a unique motivational research methodology.*

Over the past twenty years, Russ has helped launch more than 100 cooperatives in a wide variety of sectors, including travel, housing, retail, distribution, food processing, renewable energy, health, culture, construction, forestry, and manufacturing. Russ is also a cooperative entrepreneur, having pioneered a national label for organic foods in the early 1990s.

“Making Environmental Sustainability Part of Your Cooperative” will be a participatory workshop focusing on understanding how environmental sustainability is intrinsically linked to the Cooperative Principles and Values, and how individual co-ops can get started with bringing environmental sustainability into their workplace. Workshop participants will leave with a host of “greening” strategies and ideas, and a solid place to start with planning for environmental sustainability.

4:15 - 4:30 p.m. Wrap Up

ADJOURN

MOBILE LEARNING SESSIONS

9 a.m. - 4:30 p.m.

Thursday • July 31, 2008

ACE Institute participants will have a choice between **two** tours of Canada's Capital Region cooperatives and caisses.

NOTE: Coaches will leave the Lord Elgin Hotel at 9 a.m. for both tours.

Mobile Learning Sessions

OTTAWA MOBILE LEARNING SESSION

Morning

Families Matter (www.familiesmattercoop.ca) is not only the name of this cooperative, but its vision. This new venture attempts to give people with developmental disabilities the choice of where they live. The co-op has created a partnership with the new McLean Co-operative Homes Inc. (www.mcleancoop.com) and Christian Horizons, a Support Service Agency (www.christian-horizons.org), to create units for Families Matter members with developmental disabilities. This is a cooperative project that may very well change the way services are delivered.

This project is considered by the Ontario Ministry of Community and Social Services to be an innovative residential model. Annualized funds provide a permanent Community Integration Facilitator at McLean Co-op, ensuring successful integration of members with developmental disabilities into the housing co-op.

Noon

From regular responsibility audits to ethical suppliers to using reclaimed building materials, Mountain Equipment Co-op (www.mec.ca), a member-owned cooperative dedicated to outdoor pursuits and social duty, has been a North American leader in sustainability. The unique Ottawa location is a reconditioned building, the first retail store in Canada to comply with C2000 Green Building Certification. Learn more from the Ottawa store's sustainability officer, and browse the cooperative's offerings. Tour-goers will stop for lunch in the vibrant Westboro Village of Ottawa.

Afternoon

Young developmental workers who saw the injustices of the cocoa trade brought home an idea for a better system. They created La Siembra Co-operative (www.lasiembra.com) that gives fair prices to cocoa farmers and, more recently, cane producers. The cooperative has seen astounding growth and name recognition since 1999. ACE participants will hear from the enthusiastic member-owners of this Fair Trade worker cooperative, and visit a nearby retailer specializing in the cooperative's delicious chocolate, cocoa and sugar products.

Late Afternoon

Alphonse Desjardins is a hero among Canadian cooperators. He founded a caisses populaires movement that endures. A special exhibit at the Canadian Museum of Civilization (Musée Canadien des Civilisations) in Gatineau, Quebec (www.civilization.ca), a very short distance from Ottawa centre, highlights his contributions as well as other pioneers. The museum overlooks Ottawa River and Canada's Parliament Buildings, and is itself a work of art, created by Albertan Douglas Cardinal to reflect the sweeps and beauty of the natural world. Tour-goers are welcome to stay late or return to nearby Lord Elgin Hotel at 4:30 p.m.

There is no scheduled event for dinner.

ST-ALBERT/ EMBRUN

MOBILE LEARNING SESSION

Morning

The Embrun area is known for its dedication to the cooperative model for community services. The ACE tour will first visit St-Albert Cheese Co-op Inc. (La Fromagerie coopérative St-Albert Inc.) founded in 1894 (www.fromage-st-albert.com). It is hoped that ACE participants will be able to see the tail end of the day's production (cheese making happens very early), and talk to the plant's manager. Next door is the cooperative's boutique with some of the best Old White Cheddar.

Tourgoers will then visit the growing town of Embrun and look in on one business operated by la coopérative Agricole d'Embrun. The group will be joined by provincial cooperative leader Denis Bourdeau who will explain the history of the area and how it has become particularly cooperative.

Lunch

Stopping at the Embrun Chevaliers de Colomb hall to enjoy a buffet, ACE participants will hear from the local Caisses Populaires manager, a new youth cooperative and Cooperative Hydro Embrun. The energy cooperative is owned by consumers, the only of its kind in Ontario. The cooperative is able to provide power to its members at half the cost others pay just outside Embrun's boundaries.

Leaving the outskirts of Canada's Capital Region and heading into its heart, ACE participants will visit Conservation Co-operative Homes (www.conscoop.ottawa.on.ca), an early housing cooperative leader in sustainable living.

From limiting the number of parking spaces for members to capturing energy that might have been lost, the cooperative is a study in what works and doesn't. Meet the cooperative's board members and examine the building's innovations.

Late Afternoon

The coach will stop by the Lord Elgin Hotel for those who wish to end their tour. It will then continue on to the nearby Canadian

Museum of Civilization (Musée Canadien des Civilisations) in Gatineau, Quebec (www.civilization.ca). There, participants will meet the Ottawa ACE Mobile Learning Session group (see Ottawa tour), and stroll through the museum or its beautiful grounds. Tour-goers are welcome to stay late or return to the Lord Elgin Hotel at 4:30 p.m.

There is no scheduled event for dinner.

