



# 2016 Year in Review

## Cooperative Development Institute

*We envision a democratically-owned and just economy where everyone can fulfill their needs and aspirations.*





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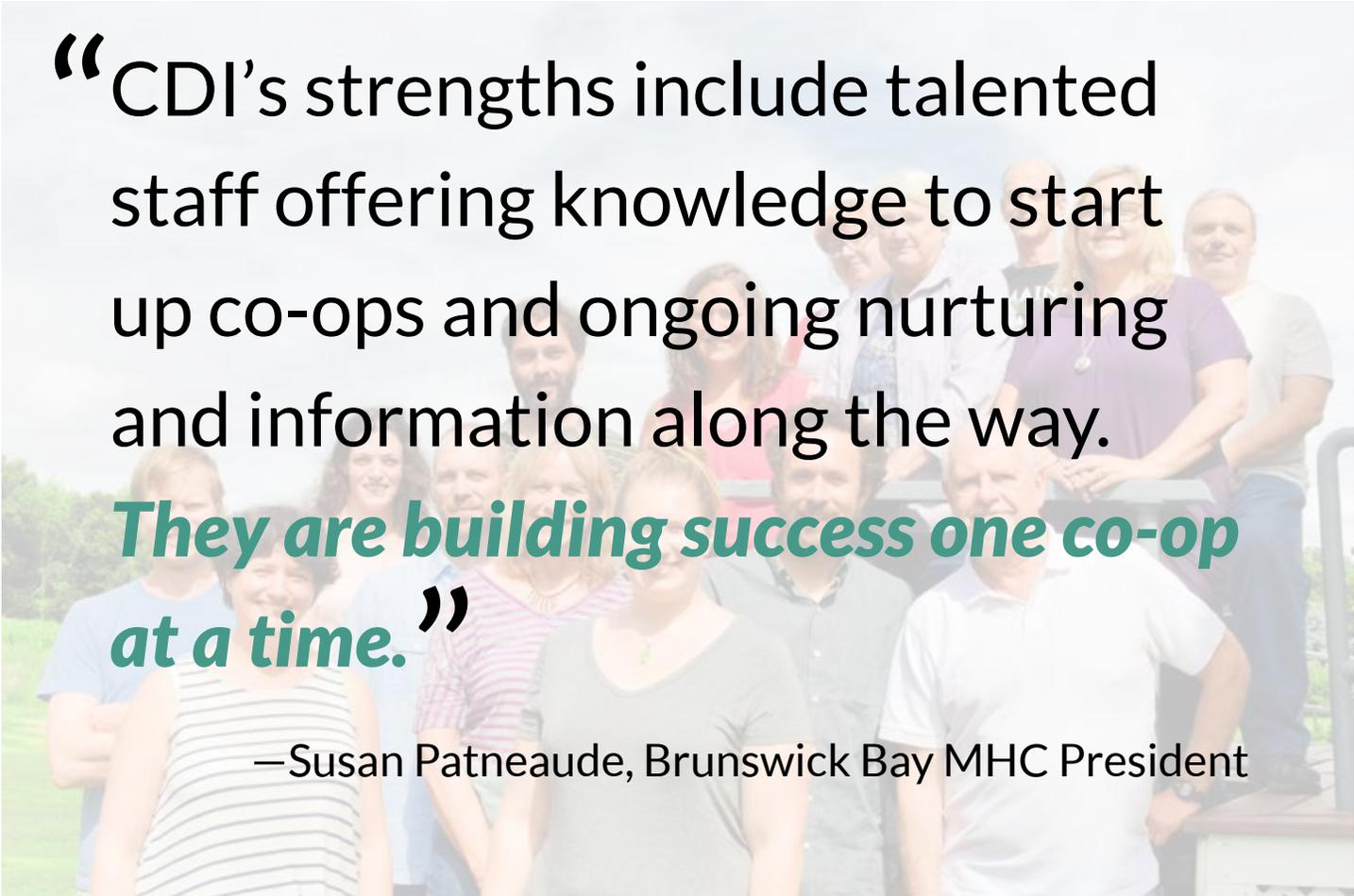
**CDI.coop**

*CDI is an equal opportunity provider and employer. Read our full statement of non-discrimination at [cdi.coop/about-us](http://cdi.coop/about-us).*

Front cover photo: Clean Bee Housekeeping Cooperative, Portland, Maine / Chris Busby, The Bollard

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“CDI’s strengths include talented staff offering knowledge to start up co-ops and ongoing nurturing and information along the way.

*They are building success one co-op at a time.”*

—Susan Patneaude, Brunswick Bay MHC President

## Cooperation Like We Mean It: The Year of Big Visions

For over twenty years, the Cooperative Development Institute has been a leader in democratizing and transforming our region's economy. We've helped create over 120 new cooperatives in every sector and state in the Northeast. We're proud of that—but this past year, we've set our sights higher.

*We envision a democratically-owned and just economy where everyone can fulfill their needs and aspirations.*

Sounds great—but can we get there from here? We believe we can. Here's how.

Last year was the year of the sectoral strategy. We built on the energy in the air for addressing inequality and focused on food systems, housing, business conversions, co-ops for Native Americans and New Americans, and arts. Each of these initiatives moved forward significantly in 2016, and worked collaboratively to hone a vision for the future. In 2017 and beyond, our focus will be on embedding co-ops in the positive visions people hold for a prosperous, equitable economy, and bringing top-quality support for individual enterprises, networks, and surrounding ecosystem change.

### Food

CDI's work in Cooperative Food Systems officially became a program in 2016. Although we've been doing food systems work for over 20 years, we reframed our work pro-actively and strategically to transform ownership to be more democratic and locally-rooted. To achieve this goal, we'll be working to measure cooperative ownership, as well as local foods purchasing overall; establishing a process to efficiently convert farmland for sale to cooperative ownership; supporting the development of multi-stakeholder food hub and food service co-ops; and engaging socially disadvantaged groups in cooperative development.

CDI is collaborating with multiple actors in the local foods movement, from farmland preservation to farm-to-institution groups to local fishing advocates. So many factors influence people's ability to grow, catch, sell, or consume healthy local food. Democratic ownership and control will ensure that the system remains rooted and resilient.

In 2016, New Roots Cooperative broke ground on a 30-acre farm in Lewiston, Maine, becoming Maine's first New American-owned cooperative. The four Somali Bantu farmers of New Roots farmed at Cultivating Community's incubator farm for 10 years before seeking their own farmland. CDI worked collaboratively with the farmers, Cultivating Community, Maine Farmland Trust, Land for Good

and Conservation Law Foundation to support these farmers to become a legal cooperative and to secure land. At the ground-breaking on August 11th, over 100 supporters from many parts of the community, including New Americans, American-born, elected officials, food systems organizers, and farmers, came out to celebrate this step forward for the Somali community in Lewiston. In New Hampshire, the New American Farmers Cooperative formed and had their first season while they worked with the Organization for Refugee and Immigrant Success and the Russell Foundation to secure land tenure.

Maine Farm & Sea Cooperative (MFSC) continued forward in 2016 after Sodexo was awarded the University of Maine food service contract. MFSC worked with Mano y Mano to serve food to over 100 Latino and Native American children at the annual Blueberry School in Downeast Maine, helping local food service workers to take the menu for the month-

long program from 0% local to 20% local with all scratched cooked food. MFSC has continued to work in Washington and Aroostook counties with schools, hospitals and an annual bike tour providing local foods consulting and on-the-ground food service programs. MFSC also released a report with the City of Portland in February that provided a 9-Step Plan for Institutions to support local farmers and fishermen.

### Housing

The New England Resident Owned Communities (NEROC) program has grown again, and is now a staff of 10, led by Andy Danforth. The program successfully aided five new residents' groups in becoming owners of their communities: two in Maine, two in Massachusetts, and one in Vermont, totalling 512 homes preserved as affordable housing. NEROC wants to see at least 100 more such communities by 2030, and is gearing up our ability to provide direct services, training, and networking opportunities to resident groups.



**A joyful new beginning for Colonial Estates with Mayor Howe and Sen. Pacheco**

In particular, we're seeing the community as a platform that can become the conduit for multiple forms of development, from wellness to economic stability to skill building.

Colonial Estates of Taunton, MA, converted in late summer 2016. Over 80% of Colonial's residents joined as members despite a rent increase that was necessary to match the competing offer. This purchase by the residents was the third time the Colonial Estates community had changed hands in recent memory. Residents were grateful for the chance remove the uncertainty that another sale may be in their future. Colonial has had a very active social committee that played a huge role in the conversion.

### Business Conversions

Business Ownership Solutions (BOS) is CDI's program to retain and grow good jobs and secure local ownership of businesses through conversion to employee ownership. We're part of the nationwide Workers2Owners collaborative, a Strategic Impact Initiative with the Democracy At Work Institute as the backbone organization and numerous state and local partners all dedicated to promoting the model of employee ownership conversion and focusing on economic and racial equity. The rapid increase in retiring baby boomer business owners threatens community economic stability, so there is tremendous opportunity and motivation to pursue this strategy. Conversions are also a great growth strategy for younger business owners, as evidenced by the success of Earth Designs, the latest BOS-assisted cooperative.

To help preserve longstanding businesses, jobs and services in our region, BOS is working to create public awareness and a supportive ecosystem of public and private institutions, policies, incentives and finance. Conversions of businesses to worker ownership is a cornerstone of the vision for building a prosperous, equitable economy in our 2016 report, *Cooperatives Build a Better Maine*. In 2017, we'll promote our report's findings with a comprehensive media and advocacy campaign, see [Maine.coop](http://Maine.coop).

In 2015, CDI organized a broad group of stakeholders to advance LD 1300, An Act to Create and Sustain Jobs Through Cooperative and Employee Owned Business Development, in Maine. The legislation adopted some of the best strategies that have been proven to work in other states. It would have improved access to financing, education and technical assistance for all cooperative and employee owned enterprises, provided a tax incentive to business owners who sell to employees, and created a Maine Employee Ownership Center. A bipartisan majority of both the Maine House and Senate approved the legislation earlier this year. Unfortunately, it died along with many other bills in the end-of-session political fighting that brought the legislative process to a halt. The agenda represented in LD 1300 has now been developed even further in our *Cooperatives Build a Better Maine* report.

### Ownership for Everyone

Most of the cooperatives we work with provide benefits to people with social disadvantages—be they elderly, low-income, women, disabled, immigrant, or

Native. Co-ops provide a way for people to combine their power to access more opportunities than they could alone. Co-ops provide security for people who face many social and economic barriers, grow good jobs and provide a space to contribute and be heard. In recent years, we have used grants from the USDA to support intensive work with socially-disadvantaged populations. This past year, that work resulted in several new immigrant-owned farms in the region (see the story of New Roots above), as well as significant networking and training that will lead to more co-ops in the future.

CDI is a regional organization yet we recognize the importance of local organizing to increase the impact of the cooperative economy. We are working to build a local cooperative ecosystem with community-based groups in the Lewiston-Auburn region of Maine, the state's second-largest metro area that contains two of the state's poorest census tracts and whose population is now about one-eighth New American. It is surrounded by farmland and small rural communities in Androscoggin County. We are working collaboratively to develop a vision for local community economic development that includes robust support for cooperatively-owned housing, food systems, and businesses, and we are catalyzing the resources necessary to make that vision come to fruition. Through this work we will create a more visible demonstration of the cooperative economy in a local area and will create a model for other communities in our region.

In New York State, we're supporting the development of an energy co-op model that permits higher-income members to help finance the participation of lower-income members, thus making renewable energy generation available to a much broader share of the population.

### Artist Co-ops

Robust cooperation requires robust culture, expressions that celebrate the uniqueness of individuals as well as honor our shared heritage and destiny.

As much as co-ops need art, artists need cooperation. In 2016, CDI shared this message with budding entrepreneurs and veteran artists, in person and online. What we heard was a deep desire to create meaningful paths toward earning a living, living well, and pursuing one's passion, whether in an urban homestead, shared studio space, or something as simple as a tool lending library. People feel the excitement of learning that co-ops are the way that artists have done that in the past and can do it now and into the future.

Our focus in 2017 will be raising money to create more tools and services for artist co-ops, particularly in communities of color. For example, we'll be working with the Urban Cooperative Enterprise Legal Center in Newark, NJ, to explore the establishment of an artist housing cooperative. We'll also be promoting co-ops at the Afro-Futurism conference at the New School. Stay tuned for further developments!

## Converting a Young Business

*Erin Domagal, Worker-Owner at Earth Designs and CDI Board Member*

I live in a community where it's common to run your own business or work for someone who does. We are artists, builders, growers, and makers with small companies that typically cannot afford to offer health insurance or 401Ks. My personal story involves years of working part time for a gardening company owned by my friend Aja Hudson while simultaneously pursuing other interests and job options; I worked in wilderness education & farming, attended graduate school, and started my own herbal apothecary business. I loved the gardening work: being outside, installing gorgeous environments, and especially working with plants. But I did not consider it more than a temporary gig. There's not much money in doing physical labor for someone else and I didn't envision owning my own gardening company. I was seeking work that was meaningful and challenging, provided opportunity for financial growth, and connected me to a larger cause.

Aja, the owner of Earth Designs, dreamed about changing the structure of her business to relieve some of the pressure and time commitment for herself. She wanted to find more motivation for employees to remain with the company. A friend from graduate school connected us with CDI and



Aja, myself, and four other Earth Designs employees began the transition work to a cooperative model. We worked over the course of a year to learn cooperative structure and governance, writing our bylaws under the guidance of CDI's Director of Business Ownership Solutions, Rob Brown. We officially formed Earth Designs Cooperative in March 2016.

What followed was an incredible year of transformation. Becoming a worker cooperative brought new job responsibilities as we restructured the business to support and encourage growth. We connected with the pride that comes with ownership, the sense of shared responsibility, and the growth that follows the challenges of democratic decision making. In autumn of 2016, I was invited to serve on the board of CDI. This opportunity expanded my

understanding of cooperatives beyond the inner workings of Earth Designs. I began to see it as an element of cultural, social, and economic change—a viable business model for creating companies that are sustainable for both the worker-owners and the communities they serve. Worker cooperatives offer the individual employee financial security and a voice in the future of the company, while promoting a culture of sharing and collaboration. I'm incredibly pleased to be engaged in this work and proud to be part of this movement. Please join us!

## Partnering for Impact

After participating in the first and second cohorts of the Democracy At Work Institute (DAWI) worker co-op developer fellowship, CDI staff were chosen as one of five groups from around the country for the 2017 Cooperative Chapter Network Fellowship organized by DAWI and the US Federation of Worker Cooperatives. The program kicked off in January with a retreat in Philadelphia, PA. Fellows are working to design and organize local, regional and statewide cooperative business associations and spent their first retreat learning about each other's work and exploring new development tools and strategies. CDI is facilitating the development of a statewide, **cross-sector Cooperative Business Association in Maine**. The Fellowship Program lasts for six months and wraps up with a final retreat in NYC in June. Cooperatives have a critical role to play in strengthening Maine's economy. The Maine Cooperative Business Association will facilitate

peer-to-peer technical assistance, mentoring and networking, and advocate for wider recognition, understanding and support of the cooperative economy among the public, private, and philanthropic sectors.

CDI is also a founding partner and steering committee member of the national **Workers2Owners Collaborative**, a nationwide Strategic Impact Initiative led by the Democracy At Work Institute. Here in New England, Collaborative members include ICA Group and Vermont Employee Ownership Center. All of us are strengthening our relationships and deepening our impact through this partnership.

Our work in **Lewiston-Auburn** is focused on convening nonprofits, businesses, immigrant associations, co-ops, development groups, and politicians to envision new forms of community economic development together.



**New Roots Cooperative Farm celebrated their launch with their supporters.**

*Photo: Maine Farmland Trust*

The **Greater Boston Chamber of Cooperatives** is an association of worker, housing, and consumer cooperatives dedicated to strengthening and expanding the Greater Boston cooperative economy through education, advocacy, and collaboration among its member organizations.

In the past, worker co-ops and housing co-ops have partnered on projects and offered mutual support in Boston, but this is the first time that they've come together with consumer co-ops to attempt building an organization with expanded capacity. The Chamber has gained particular traction around advocacy work with the City of Boston.

By request of the Greater Boston Chamber of Cooperatives, on January 24, 2017, the Boston City Council held a hearing on co-ops. The hearing was hosted by the chair of the housing committee and the chair of workforce development. The four-hour

session featured a panel about housing cooperatives, a panel on worker/consumer co-ops, and a panel of city employees. More than a 100 people filled the seats in the council chamber, excited to be a part of an unprecedented moment of co-op advocacy and visibility in Boston.

Since then, the City has considered a number of administrative changes that would include co-ops in their programs for housing development and small business support. The Chamber is bringing together dozens of co-ops in networking events and developing a marketing strategy for publicizing the co-op model.

In affordable housing news, CDI worked with a **network of lenders** including the Genesis Community Loan Fund, ROC USA Capital, Camden National Bank, and the Maine State Housing Authority to successfully convert five manufactured home parks to resident owned communities representing 512 homes.



## Information Please

By the numbers, CDI had a banner year. Our work spanned program areas and gave people across the northeast more financial security and the freedom to live fulfilling lives. As part of fulfilling our mission, CDI provided about 40 educational events to audiences totaling over 1,500 people. We also worked on several research and communications projects to strengthen our region's understanding of co-ops and co-op development.

This past year CDI went back to its roots—few people know that this organization was started in 1994 following a region-wide survey of co-ops' education needs conducted by Cornell professor Brian Henahan and a cooperative development specialist, Anders Ferguson. In 2016, Cabot provided seed funding for **a new region-wide census of co-ops**. CDI took on this project as a contribution to the development of locally-rooted co-op ecosystems. We worked with on-the-ground organizers to maximize the benefit of the research and outreach. And we improved on past survey formats to increase the ability to compare and aggregate findings within and outside the region. This census was aimed at a baseline of identifying existing cooperatives, and later work will connect these lists with economic impact data, cross-sector organizing, and public awareness raising.

CDI staff, board members and partners produced a major report entitled ***Cooperatives Build a Better Maine***. The report outlines a vision of a prosperous,

equitable economy where all Mainers—young and old, new and longstanding—can fulfill their needs and aspirations. The economy we envision is anchored by a robust cluster of cooperative and employee-owned enterprises that help many individuals and communities create more wealth for more Mainers, promote entrepreneurship and innovation, and deeply root ownership locally. We explain why our vision makes sense, what it could look like, and what steps we need to take to get there.



Our popular **Co-op Cathy column** gained steam in 2016. The pseudonymous Cathy provides introductory co-op education and technical assistance to inquirers who submit their questions via CDI.coop. We published six Co-op Cathy articles in 2016 and fielded dozens more inquiries behind the scenes, making Co-op Cathy one of our most-used resources for the co-op community and general public alike.

## Financial/Outcomes Overview

This past fiscal year we broke the million-dollar milestone—by a lot. We grew by about 60% from the previous year, from just over \$900,000 to \$1,400,000 (\$1,600,000 counting our fiscal sponsorship activity).

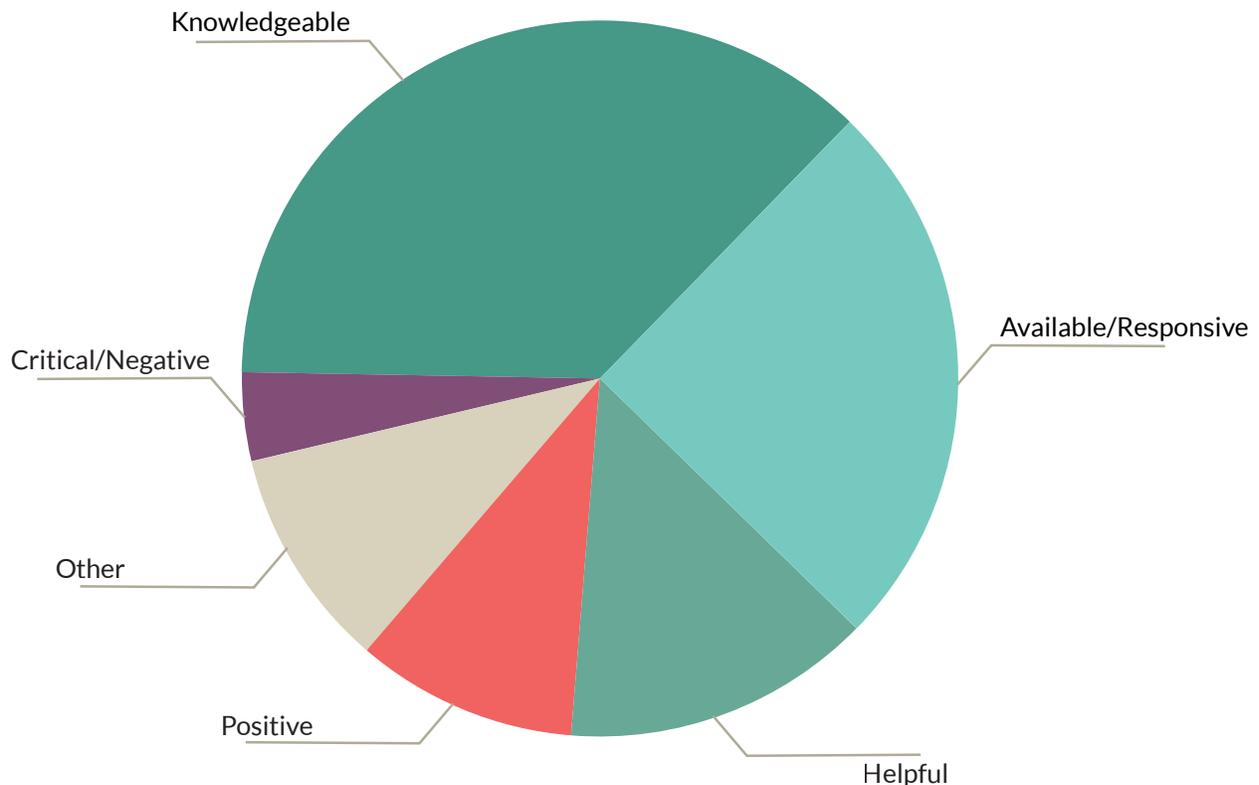
As our name implies, we mostly do cooperative development; it's 90% of our activity. That said, we're looking to invest more in our administrative capacities, so that our systems can mature along with our programs.

Our clients and collaborators appreciate what we can bring to move projects toward

fruition. This past year, when asked to comment on CDI's strengths, people found us as in previous years to be knowledgeable, responsive, and helpful. Our average rating among clients is 8.2 out of 10, and their likelihood of recommending us to a friend or family member is 8.9 out of 10.

***People found CDI to be knowledgeable, responsive, and helpful.***

For us to do our work, we need some solid resources. Our revenue comes roughly half-and-half from grants and contract income, and are enough to cover our expenses.

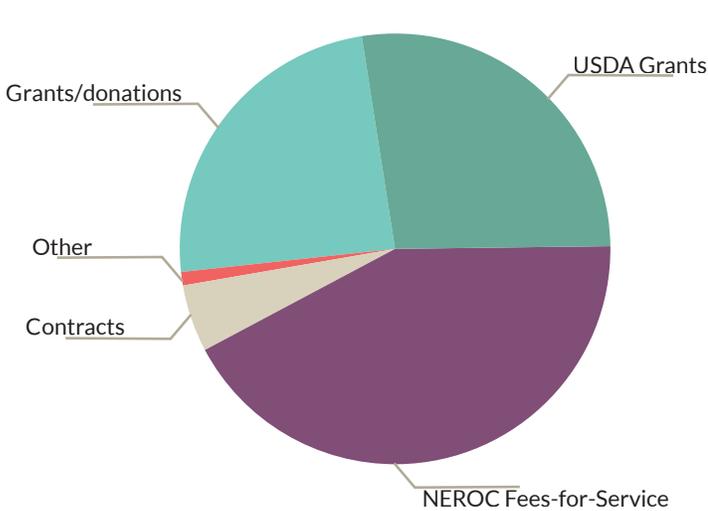


**Why CDI: Top categories of responses named in CDI's 2015 Client Satisfaction and Outcome Measurement report**

## How did we use the money?

We assisted cooperatives employing over 200 employees and helped 54 cooperatives strengthen operations. We provided about 40 educational events to over 1,500 people. We respond to around 80 new inquiries a year and work intensively with over 50 groups.

- » Helped create 5 new manufactured housing co-ops with 512 residential units
- » Assisted four other residents' associations that are working to buy their land
- » Helped seven new agricultural co-ops form, including one worker co-op farm and two immigrant-owned enterprises

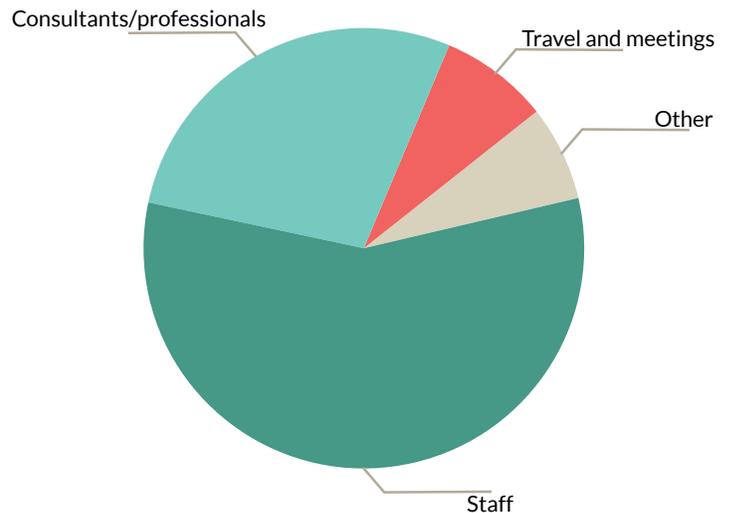


### Support and Revenue

- » USDA Grants: \$402,800
- » Other Grants and donations: \$453,700
- » NEROC Fees-for-Service: \$716,500
- » Other Contracts: \$95,000
- » Other Income: \$6,000
- » Total Income: \$1,674,000

- » Supported the creation of a first, model consumer-owned media cooperative
- » Assisted in the conversion of a privately owned landscaping business into a worker-owned cooperative employing 12 people – see page six
- » Provided ongoing technical assistance to another 26 manufactured housing co-ops

***We assisted cooperatives employing over 200 employees and helped 54 cooperatives strengthen operations.***



### Expenses

- » Staff: \$905,184
- » Consultants and professionals: \$434,659
- » Travel and meetings: \$132,058
- » Other expenses: \$112,637
- » Total expenses: \$1,584,538

## Advancing our Mission and Delivering Value to Our Funders

The US Department of Agriculture plays an important role in helping rural communities and economies to flourish and prosper. It devotes over \$100 billion to ensuring that rural communities have the support they need to access healthy nutritious food and develop economic opportunities that fit their unique needs. CDI continues to be a proud partner in advancing these goals in the Northeast, and for the eighteenth year in a row, CDI was awarded a Rural Cooperative Development Grant (RCDG) of \$200,000 for the federal fiscal year beginning in October 2016.

The generous support of the USDA has helped enable CDI to leverage \$854,000 in contract and grant funding, allowing us to assist rural co-ops in the Northeast access an additional \$3.3 million in grants, equity and debt financing for growth and development.

The RCDG is integral to fulfilling CDI's mission to work with people in the Northeast to create cooperative businesses and networks that grow a prosperous, equitable economy. This long-term partnership has allowed CDI to provide free or low-cost services to co-ops and other businesses in the the Northeast. In the year ending September 2016, CDI helped form nine rural co-ops and other group-owned businesses, helped create 42 jobs, retained 150 jobs, and preserved 229 units of affordable rural housing. Overall, in Federal fiscal year 2016, CDI's ROC program completed seven conversions in three states preserving 669 units of

affordable, privately-owned housing. We provided direct assistance to 44 cooperatives and provided 36 educational, training, and networking events to 1,450 people interested in cooperative development.

In 2016, CDI received increased USDA grant funding for our work with Socially Disadvantaged Groups. We received an award of \$175,000 to continue our work with Native Americans, New Americans, and other marginalized communities. With this support from the USDA, CDI created our Cooperative Food Systems program in 2016, and continued our work with 15 groups including the New American Farmers Cooperative in New Hampshire and the New Roots Cooperative Farm in Maine. As a result of a collaborative effort involving CDI, Maine Farmland Trust, and Cultivating Community, beginning in 2017, the New Roots Cooperative Farm will be farming on 30 acres of land in Lewiston, ME, with an option to purchase. The USDA Socially Disadvantaged Groups Grant also enabled CDI to work with the Passamaquoddy Nation, the Akwesasne Mohawk ONKWE Farming Collective, and Micmac Farms to develop cooperative food systems, and supported youth engagement through the ORIS Fresh Start Beginner Farmers Group and the Groundswell Beginner Farmers Group. CDI also assisted the Manos Unidas Multicultural Education Cooperative of Massachusetts in the development of their bilingual publication, *Fronteras Comunes*.

An additional USDA Housing Preservation grant allowed CDI to assist the Pioneer Co-op of Franklin

County, MA. Through the provision of technical assistance, training, direct grant funding and financing, the program undertook the rehabilitation of 5 multi-family properties, serving 10 low-income and 19 very low-income individuals in Massachusetts.

We received \$30,000 from the John Merck Fund to further support the Somali Bantu farmers in Lewiston to reach institutional markets. So far, this funding has helped to support collaboration among four groups that are doing food and farming working in the Somali Bantu community and a series of Farming for Wholesale Workshops.

CDI continued its longstanding partnership with the Broad Reach Fund of the Maine Community Foundation, which in 2016 allowed us to further develop the Business Ownership Solutions Program and to lay the foundation for a Maine Cooperative Business Association, which will serve as a platform

to network the various sectors of Maine's expanding cooperative economy. This year, CDI is working with the Broad Reach Fund to develop a long-term strategic plan to take cooperative development in Maine to the next level. The goal is to nurture a sustainable cooperative ecosystem in Maine. This plan is being developed in partnership with the Cooperative Fund of New England and the Genesis Community Loan Fund.

Building on the relationship established in 2015 with the Elmina B. Sewall Foundation, in 2016, CDI was able to strengthen and enhance our assistance to NEROC communities in Maine, and engage in additional pre-development outreach to owners and residents of manufactured housing parks. This led to the conversions of two manufactured home parks, Sunset Acres and Sunset Terrace, resulting in one hundred residents gaining ownership of their communities. CDI will continue to provide technical assistance as these communities engage in self-governance and democratic



**USDA funding made our work with socially disadvantaged groups possible.**

*Photo: RAISE-Op Housing Co-op, Lewiston, Maine*

decision-making to manage their communities. Funding from the Sewall Foundation also assisted with the further expansion of CDI's Business Ownership Solutions program in Maine and the development of the Maine Cooperative Business Association. With support from both the Broad Reach and Elmina B. Sewall Foundations, CDI was able to produce the *Cooperatives Build a Better Maine* report, a comprehensive overview of the flourishing present and promising future of Maine cooperatives, featuring profiles of successful cooperatives operating across a variety of sectors. The report offers succinct policy recommendations for advancing the development of Maine's cooperative economy. Additionally, funding from both foundations enabled the production of a video highlighting resident-owned communities and the residents we collaborate with to make ROCs vibrant democratically-owned and governed communities.

Additional sponsors who made the Maine report possible include: Cabot, AG New England, USDA Rural Development, ROC USA, Bangor Savings Bank, Belfast Co-op, Coastal Enterprises Inc., College of the Atlantic, Cooperative Fund of New England, Cooperative Maine, Local Enterprise Assistance Fund, Maine Farmland Trust, Maine Organic Farmers and Gardeners Association, Portland Food Co-op, and the VIA Agency.

We would like to thank Cabot Creamery Cooperative for their support to conduct the 2016-2017 Northeast Co-op Census. The census will help lay the foundation for cross-sector cooperative development, increase the

visibility of our collective efforts, assist with marketing, and enhance our advocacy efforts by showing the impact of the cooperative economy as we seek to enact public policies to support cooperative development. Additional support for the Co-op Census was provided by South Mountain Company, VSECU, CDS consulting Co-op, Park Slope Food Co-op, Local Enterprise Assistance Fund, Cooperative Fund of New England, and the Social Enterprise Greenhouse. We also wish to thank New Visions Foundation for invaluable general operating support for our continued outreach efforts in 2016. Finally, eternal thanks to our loyal sustaining donors, including CDI co-founder Bob Rottenberg. You make our work possible!



**Many funders helped make our report about Maine's co-op sector a reality.**

*Photo: Sarah Van Horn, NH Community Seafood*

## How CDI Changed and Grew in 2016

In 2016, CDI continued to add staff positions and expanded our Board of Directors to strengthen our capacity to build a cooperative economy.

### Business Ownership Solutions



We were pleased to bring on Marcel Gagne as a Cooperative Development Specialist in the Business Ownership Solutions (BOS)

program. Formerly, Marcel was with Western Maine Community Action doing workforce and business development under the Jobs Driven National Emergency Grant (JD-NEG) in Androscoggin, Oxford, Franklin, Kennebec, and Somerset counties of Maine. He has an extensive background in workforce development, community and economic development, training and talent development for non-profit and for-profit business, and as an advocate for education and life-long learning. Marcel is currently involved in the creation and implementation of the Institute for Continuous Improvement (ICI), a community/economic development process, in partnership with the Lewiston Auburn Metropolitan Chamber of Commerce. He serves as a board member on the Lewiston-Auburn (LA) Metropolitan Chamber of Commerce, is a board member and treasurer of Community Credit Union, and is Chair of USM's LA College Community Advisory Board.

### Resident Owned Communities

2016 also saw the addition of three staff positions in support of expanding Resident Owned Communities across our region. Jeanee Wright, Annik Paul, and Thomas Choate joined the NEROC team.



Jeanee Wright joined CDI as a Housing Program Specialist focusing on Maine. She has over 20 years of training experience and ten years of

cooperative development experience. Prior to joining CDI, she spent seven years serving on the Board of Directors in her cooperative, where she led a planning committee to overhaul her community's infrastructure. Her involvement and knowledge from that experience led her to a position as an Organizational Development Specialist with ROC-NH providing assistance with funding, training and education to more than 120 resident-owned communities in New Hampshire, where she focused on developing leaders in other resident-owned communities to identify, plan, fund and construct projects that ultimately stabilized community infrastructure. She is experienced in developing curricula and facilitating training designed to strengthen tools and processes to manage the role of operations managers and other maintenance volunteers. Jeanee is also experienced in acquisition, financing and post-purchase technical assistance. She is passionate about leading others to solutions through good action planning and commitment.



Annik Paul joined CDI as a Housing Program Specialist focusing on Vermont. Annik obtained her M.A. in Sustainable Development from SIT

Graduate Institute and wrote her thesis on planning and designing a volunteer-based organization. She spent a year volunteering with Transition Putney (Vermont) designing a framework for a sustainable, resilient, and socially just community. Her focus was on localizing the food system by supporting and creating community gardens, farmers' markets, buying clubs, a low-income CSA, and a food pantry. She received her B.S. from Worcester State University as a double major in Accounting and Finance. Prior to joining CDI, she worked for the Champlain Valley Office of Economic Opportunity/Mobile Home Program as a Resident Organizer.



Thomas Choate also joined CDI as a Housing Program Specialist in CDI's NEROC Program. Thomas's background includes time as a

research analyst, natural builder, carpenter, and a developer. This has included work with the Reinvestment Fund Development Partners, the Penn Institute for Urban Research, QBL Real Estate, a national consultancy for municipal and cultural development partnerships, and Carolina Common Enterprise. Most recently, Thomas provided business planning, investor relations, project management, and "deep green" land planning as a consultant for community-minded real estate developments, large and small, in Asheville, NC. Originally from Austin,

Texas, Thomas studied Latin American Politics at Southwestern University and received a masters in City Planning from the University of Pennsylvania.

## Development and Communications



Doug Clopp joined CDI as the Director of Development and Communications. He has over two decades of experience working in

both the non-profit and for-profit sectors focusing on developing advocacy campaigns, strategic partnerships, fundraising, communications, legislative advocacy, and grassroots organizing. Prior to joining CDI, Doug served as the national Director of Outreach for FairVote, responsible for advancing electoral systems change. He is the former Director of Strategic Partnerships and Deputy Director for Program for Common Cause, where he was responsible for developing partnerships with national and state organizations to support the organization's programmatic and campaign goals. On the the state level, Doug was the State Communications Director for Repower Maine, an affiliate of the Alliance for Climate Protection, where he focused on advancing clean energy and climate change legislation, and previously, was the Director of Governmental Affairs for the Consumers for Affordable Health Care Foundation. His private sector experience includes serving as the Vice President for Strategic Partnerships at Union Atlantic Electricity, a competitive electricity provider devoted to advancing a labor economy.

## Board of Directors



Josh Daly is the Director of the Southern Region for the Rhode Island Small Business Development Center (SBDC) at the University of Rhode Island. Josh works with start-ups and existing businesses, both high growth and main street, to help them launch, grow, and transition successfully. Before his work with the RISBDC at URI, Josh was active in the entrepreneurial community in New Orleans, mentoring through incubators, and consulting through the Small Business Development Center there. Prior to business consulting, Josh managed experiential education and university-community engagement programs at Loyola University. Josh holds an MBA from Loyola and an MA in Ethics from Saint Paul University (Ottawa). He lives in southern Rhode Island, his home state, and enjoys spending time with family and friends, getting outdoors and making music. He's a bookworm with a particular love of philosophy and political economy.



Erin Domagal is the Creative Director of Earth Designs Cooperative, a landscaping cooperative in the Hudson Valley, of New York state. Her passion for education and the environment flows through her previous work in wilderness and farm-based education programs and her work as herbalist and owner of Wild Seed Apothecary. She has a BFA in Painting from SUNY New Paltz and a Master's Degree in Education from Goddard College.



Jordan Motzkin is an entrepreneur and consultant. As an entrepreneur he is the Co-Founder and CEO of Big Box Farms, a NYC-based technology startup. Big Box Farms is developing breakthrough technology for the production of salad greens resulting in fresher, safer, and more nutritious produce and is partnered with the second largest produce distributor in the United States. The company has received National Science Foundation research grants, funding from the US Department of Agriculture, and has turned down millions in Venture Capital funding.

As a consultant Jordan formed PitchWorks, a consulting firm focused on providing strategic early stage growth and pitch advice for startups and new corporate initiatives. Clients include leading Venture Capital Funds, Private Equity funds, Senior Fortune 500 Executives, and first time entrepreneurs.

Jordan frequently lectures on the intersection of entrepreneurship and innovation at a variety of venues including Columbia University and the U.S. Japan Business Council. He has been interviewed and his work has been featured in Forbes, CNN Money, Mashable, CBS Television, Fox Business, Rockefeller Philanthropy Advisors and Net Impacts Principled Leader.

## Looking Forward to 2017

*As we look ahead to 2017, we are dedicated more than ever to using cooperative development as an agent for positive change in our communities and in our lives.*

*Cooperative development is more than, well, cooperative development. It is a catalyst for social and economic transformation that fulfills human needs and aspirations while providing greater economic security and freedom to achieve our fullest potential. CDI's Jeanee Wright offers this insight through the lens of our Resident Owned Community conversion program.*

### Envisioning the Future, Using ROCs as a Platform for Wellness

In 1974 my parents bought a single-wide mobile home in a land leased park and we lived there for a number of years before we moved to other housing. My parents were wage earners and often moved in search of better jobs, housing or a better sense of security. In my adult life and as a single mom for most of it, I have also been in search of that same security.

Fortunately, 10 years ago, my husband and I purchased a single-wide manufactured home. Ownership is great for the security it provides. We are also fortunate to live in a resident owned community (ROC), where we are one of 52 co-op member owners, each of whom pays towards the cost of owning and maintaining our investment. It's a great model, co-op ownership, and it has definitely secured our future and the future of the home we live in.

Resident ownership removes the fear of a developer buying the land and our having to move our home. We also know by stepping up and being involved with the co-op volunteer efforts, we have a say in how things are managed. Being managed directly by owners helps control costs and keep the lot rent affordable. While being a member of a ROC has provided housing security for my family, ROCs are so much more. They have helped to build a real sense of community and offer the prospect of a platform for long term wellness.

Recently, I've been thinking about ROCs in an even broader sense and in the context of how they relate to Maslow's Hierarchy of Needs which tells us that there are actually 5 levels of needs that motivate humans. Some are basic, such as food, shelter, safety and water, and other needs are emotional, such as love and belonging. At the top of the pyramid Maslow lays out the needs for self-actualization or self-fulfillment. I believe that this more in-depth theory of what motivates people can help drive our mission to help individuals build a foundation for a successful life.

This past year I participated on a panel at the I'M HOME Conference in San Antonio, Texas. The topic was a discussion on Manufactured Housing as a Platform for Family Wellness. The panel included three organizations, Augusta Communities, Family Promise, and CDI. Each provides services for residents living in manufactured housing communities.

Augusta Communities, located in California, is a non-profit that purchases manufactured housing parks

to provide affordable housing and then provides services and programs that promote family wellness. These services include after-school homework clubs, water conservation classes, youth summer camps, and financial literacy classes.

During the discussion, we all agreed that wellness matters in the lives of each of us, and that ROCs have enormous potential to be community based platforms to integrate and deliver an array of services, build even greater self-reliance, and strengthen our communities. Enhanced networking and the active promoting of services opens up a better chance for broad life opportunities and may help with aging-in-place initiatives.

The eight Maine co-ops that I work with are highly networked. Since 2013 these communities have been working to drive a networking platform. They come together three or more times a year to talk about challenges to the communities as well as to promote training and services to residents. These volunteer residents have helped to create community gardens and develop emergency preparedness plans. They have met with local vendors about discounts and state agencies about best practices for infrastructure management.

These services alone are a benefit to the community, but the underlying benefit comes from the individuals who promote their own wellness. Residents who once did not even know their own neighbors are suddenly

empowered to step up and get to know one another, all while promoting each other's best interests. Stories of job promotions and goals accomplished are what continue to support Maslow's theory of the human need for self-actualization and self-fulfillment. Providing people with the opportunity to drive their own success can actually affect outcomes for their entire life.

One community in Maine promoted a Good Shepherd Food Truck in the community. One might think this was to support the residents in the community, but actually it was to support the entire town. More than 70 families walked away from that truck with food. The



community walked away with a sense of pride and accomplishment. The town that they live in now has a different view and respect for the community. I guess you could say that everyone was fed on that day. They proved Maslow's theory on the need for belonging in its truest sense.

We are finding proof that promoting wellness for residents is just as important, if not more important, to meeting long-term affordable housing needs. Apparently, Maslow knew there was a bigger equation. I envision a future where manufactured housing communities are a place where working individuals, families, and retired individuals can live for a lifetime—where each person doesn't simply reside in the community, but develops a future that meets every need: from basic and emotional needs to self-actualization.

# CDI Statement of Mission, Vision, & Values

## Mission

Cooperative Development Institute (CDI) is the Northeast's center for cooperative business education, training and technical assistance. CDI's mission is to work with people in the Northeast to create cooperative businesses and networks that grow a prosperous, equitable economy.

## Vision

We envision a democratically-owned and just economy where everyone can fulfill their needs and aspirations.

## Values

CDI holds the following values as important within our organization and in our work with communities: cooperation and collaboration; equity, justice and fairness; integrity, honesty, and transparency. We aim to foster respect, inclusion, patience, trust, responsibility and wellness and to develop resilience and environmental sustainability. CDI fully supports the statement of values and principles adopted by the International Cooperative Alliance. CDI's work is also guided by the Madison Principles, professional standards set by cooperative development leaders in Madison, WI in 1994. Finally, in our resident-owned community work, we ascribe to the ROC USA™ Organizing, Training, and Technical Assistance Principles. All of these principles are proudly displayed on our website at: [cdi.coop/about-us/professional-principles](https://cdi.coop/about-us/professional-principles)

## How We Work

We provide direct technical assistance for co-ops of all kinds and at all stages of development. Through communication, training, and facilitation, CDI can help bring the resources and energy together to produce creative, lasting responses to our real human needs through cooperatives.

We work with start-ups, established cooperatives, and businesses considering conversion to cooperative ownership. We work with every kind of owner: consumers, workers, residents, farmers, fishermen, foresters, independent businesses and municipalities, and multi-stakeholder cooperatives.

Our staff and consultants bring experience and insight to all aspects of starting and running a cooperatively owned business.

CDI excels at analyzing and diagnosing our clients' needs, making client-specific recommendations, helping the client create an action plan, and monitoring or mentoring progress until the plan is completed or terminated. We are skilled in managing the special dynamics of individuals working together as a group to consider, undertake, or develop a common business venture. Our service delivery approach ensures the group is fully engaged in technical assistance and develops effective leadership skills to manage the challenges of operating a member-owned enterprise.

## CDI's Process

CDI makes democratic ownership work for everyone by adhering to a proven successful process.

- » Prospective clients fill out a request for assistance to establish a baseline level of information and help us make a referral to the most relevant resources and staff.
- » Within two weeks, CDI staff respond with preliminary resources or schedule an exploratory conversation.

If requested by the client, CDI staff provide 5-10 hours of pro-bono mentoring:

- » CDI staff help the client determine a plan for next steps, monitor progress, provide information, assist with problem-solving, and make referrals.
- » When mentoring is complete, CDI requires the client to complete a service satisfaction survey.
- » CDI staff check in at longer, 3-6 month intervals to track progress, identify emerging business issues and needs and provide further technical and referral assistance.

If the client requests more intensive consultation:

- » CDI formulates a scope of services fee-based proposal to address challenges and needs.
- » If appropriate, CDI assists the group in applying for funding or conducting fundraising activities to pay for services.

- » CDI staff, consultants, and/or partners work with the group to address the business need.
- » When the project is complete, CDI requires completion of a client satisfaction survey.
- » CDI staff follow-up every 3 to 6 months to track progress, identify new issues and provide technical and referral assistance.
- » CDI requires completion of an annual outcome measurement / census survey to measure progress.
- » The group will also be encouraged to pay it forward.

In some cases, consultation will be intensive and ongoing, based on a service contract.

- » In such a case, the group will receive an annual outcome measurement / census survey and a customer satisfaction survey at the same time.

We look forward to working with you!





# Cooperative Development Institute

*We envision a democratically-owned and just economy where everyone  
can fulfill their needs and aspirations.*

**Visit us online at [CDI.coop](http://CDI.coop)**