



Equal Exchange: Increasing Education and Participation for Remote Office Employees in a Worker-Owned Cooperative

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Abstract

This project focuses on Equal Exchange's Education Committee goal to increase the education and training opportunities for remote staff and regional offices around the United States. Since Equal Exchange is a worker cooperative, education among membership is a very important task in its workplace principles. This report explains the objectives and inputs used to implement educational and training programs so that they better reach employees outside of the main office in West Bridgewater, Massachusetts. Though not all results are reported here because of delayed implementation and constrained budgets, this report will give anyone in the cooperative movement a good idea of what it means to have a strong educational program. It will also offer a variety of ways to train and educate potential worker-owners, which leads to better decisions made within the company. Having a higher participation rate empowers employees and encourages them to work longer for the company. In worker cooperatives, having employees stay longer means increased equity both for the company and for each employee.

Executive Summary

Equal Exchange is a worker-owned cooperative so employees are expected to fulfill their worker-ownership track duties prior to being presented for worker-ownership votes. The Equal Exchange Education Committee reports to the worker-owner body, and is in charge of the education curriculum, library, Exchange Time, and the Mentor Buddy Program and oversaw this project. This project focused on the 11 full-time employees of Equal Exchange who worked outside the West Bridgewater office and could not fully participate in the educational component of worker-ownership because of location, time zone difference, and lack of available technology. Many employees were not able to meet the curriculum guidelines because they never received Exchange Time videos, time zone differences made it hard to participate in meetings, and they were not able to meet frequently with their Mentor. Having educated employees that are able to finish their education curriculum and understand fair trade, product quality, globalization, budgeting, participating, cooperatives, etc. benefits Equal Exchange because employees can better market their products, company, and worker-ownership to the public, and increase their participation as worker-owners. A stronger worker-owner body also builds economic capacity for Equal Exchange as more employees stay and build equity for the company and make educated decisions that keep the co-op viable. This project proposed to develop a redesigned Education Committee with an education program for regional offices and remote employees of Equal Exchange who did not have access to on-site book libraries, video libraries, video technology, and live visual participation in meetings and Exchange Times. Previously both the Worker-Owner Coordinator and the Education Committee Chair had too much responsibility and not enough support. By defining and creating positions with specific job descriptions, the Education Committee could take on many of the previous tasks of the Worker-Owner Coordinator and Education Committee Chair. These new positions focused on remote offices and leveled the education and participation playing field for all offices, regardless of location. Increasing on-site technology and local access to book and video resources gave remote employees the opportunity to have the same education as employees of the Equal Exchange main office in West Bridgewater, MA. All remote employees were asked to participate in a survey that was used to find the common problems, themes, requests so their needs could be evaluated. The results of this survey lead the Education Committee on the next steps to take. By the end of this project's implementation the Hood River, Oregon and the Madison, WI office both had onsite video libraries consisting of every Exchange Time video on DVD, had many of the Exchange Time videos online available to download for employees who are not out of any of the main three offices, had all the new orientations digitalized and in PowerPoint available for download online, updated and online worker-owner manuals, and with a new video camera Equal Exchange was able to video broadcast its Worker-Owner, Board, and staff meetings online to those regional offices so they could fully participate. The success of this program was evaluated by conducting a pre and post survey through an online survey company called Survey Monkey to see if needs were met and satisfaction levels were higher. The committee also kept check lists to see if videos were being watched, books were checked out, noting if more worker-owner track employees are completing their curriculum before their one-year vote, and seeing if more regional employees are participating in large all staff meetings.



Equal Exchange employees at the West Bridgewater Office in 2007

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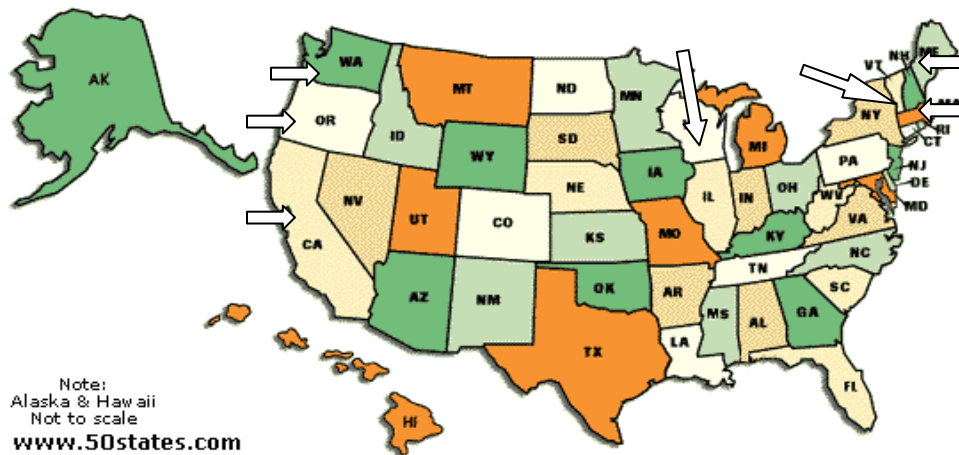
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I. Community Needs Assessment

At the time of this project, Equal Exchange was a fast growing fair trade coffee company. With organizational growth of over 20% hiring new employees was an on-going process. In order to remain competitive in the marketplace and provide exceptional customer service, regional offices and remote employees were set up throughout the northwest and a Midwest office was being established in Madison, Wisconsin. As a worker-owned cooperative all members of the company were reviewed and voted for worker-owner membership after their one year service and reviewed by current worker-owners. In order to continue to work for Equal Exchange one must be a worker-owner after his/her first year of work unless a petition was reviewed and accepted by current worker-owners. Once voted into the company, an employee bought a Class A share of stock, giving him/her full voting rights (1 share = 1 vote) and he/she became owners of the company. If there was profit, dividends were distributed each year and employees were required to retain 50% of their patronage rebate in their internal capital account. This built equity among Equal Exchange and for each employee.



The staff attended regularly bi-monthly worker-owner meetings, attended Exchange Time sessions every Thursday morning, attended bi-weekly staff meetings, and participated in committees. Worker-owners voted in worker-owner meetings where they elected all the members of the Board of Directors and voted on decisions affecting the company at large, such as a new operation, new location, or a change in the By-Laws.

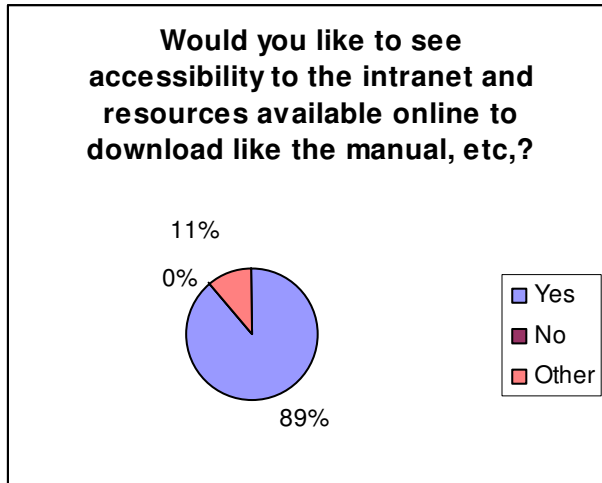


Arrows represent all the cities where remote full-time employees work (seven states).

The Education Committee conducted a survey in April – May 2005 of the 11 remote employees to get their feedback on how things were going, what changes they would like to see, what needed to happen to improve the Mentor Buddy Program, to receive Exchange Time videos, to participate more in meetings, to have updated worker-manuals, etc. All employees of the company were asked to suggest questions and then the survey was created by the Education Committee. The Education Committee combined the responses and decided on 10 questions to use. The survey was then passed around the Education Committee and sent to remote employees who were very active in

providing suggestions for the survey, and a final version was put online at <http://www.surveymonkey.com>.

The Education Committee received 9 out of 11 potential responses. One remote employee decided not to participate because he trusted everyone else's answer to reflect his opinions, and another employee had no internet access. *See Appendix A for the results of the survey questions.*



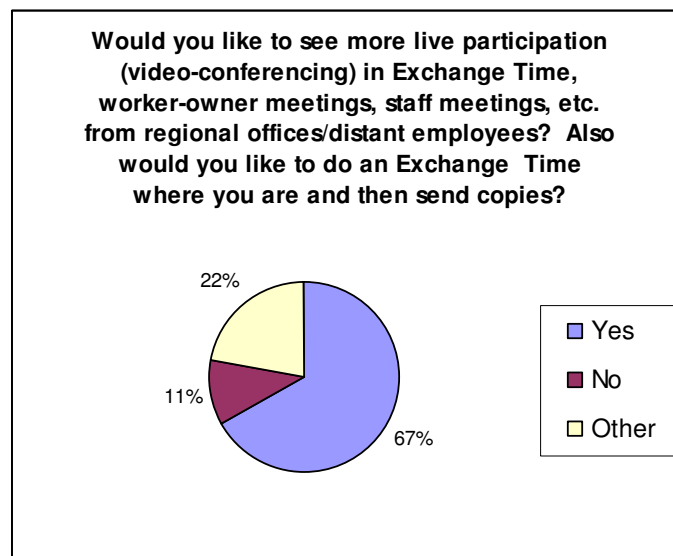
Graphs from the survey results:

Many remote employees of Equal Exchange (EE) who are not out of the main three offices – West Bridgewater, Hood River, and Madison did not have intranet access. The intranet is a private internal online web page for EE employees only. Meeting agendas, minutes, staff rosters, contact information, quality control forum, worker-owner voting forms, help desk, discussion boards, etc. are all on the intranet. If an employee cannot access

the intranet, he/she miss important information and updates.

Another major issue was the fact that in all the meetings whether they involve staff, educational, Worker-Owner, or Board of Directors there was no live video broadcasting to other offices. Any employee was welcome to call in and listen and take part via the phone, but he/she could not visually participate. When remote employees participated in meetings no one could see their faces or emotions and vice-versa.

Exchange Time was the only meeting that was taped and sent to remote employees. Also, the only Exchange Time presentation location was in West Bridgewater. No other offices had the facilities or support to film their own Exchange Times. This meant that all educational resources came out of the West Bridgewater office. The majority of remote employees also said they did not watch Exchange Time videos because they did not get them or did not prioritize the time. This was because most remote employees were not supported to watch the videos even if they happened to receive them. The lack of participation and knowledge about the company, governance, fair trade, cooperatives, etc. impacted the employee retention rate



for Equal Exchange. Equal Exchange was not a place for making a lot of money, but rather a refuge or incubator for those seeking to work for social justice and worker-control. If employees feel out of the loop or disempowered to participate they may feel encouraged to seek work somewhere else. Also if an employee does not understand what it means to work for a cooperative, pressure for a higher salary might encourage him/her to seek work elsewhere.

II. Problem Identification

Problem Statement:

Equal Exchange struggled to keep up as an active educated worker-owned cooperative while it hired new employees, opened up regional offices, and expanded existing departments. Members, particularly in regional offices were not completing their education curriculum on time, not participating in all the meetings, and not watching Exchange Time videos.

Below is the list of problems that the Education Committee prioritized to address:

- The Education Committee Chair and Worker-Owner Chair had too much responsibility and did not delegate enough.
- The intranet contains information about staff, product, cooperative, governance, and the computer system that was accessible to Hood River and West Bridgewater employees only. Unfortunately staff that was outside those two offices did not have access to the intranet and therefore missed out on programs and information that united and educated the members.
- Exchange Time sessions were only viewed live by West Bridgewater staff. Each session was filmed and supposedly sent to Madison and Hood River where staff was then supposed to send it to other employees; however often the video got lost, damaged, or never was resent. Thus many employees did not view the footage and missed out on educational opportunities. Those that were new to the company had a year to complete curriculum that consisted of many Exchange Time sessions. Many employees outside of West Bridgewater were not able to complete the curriculum so they were voted in the company even though they did not have the full educational capacity as a proper worker-owner.
- Worker-owner manuals were also very out of date and there were no online versions for offices to download. This means that a new non-West Bridgewater employee might have had to wait longer than a West Bridgewater employee to receive their manual.
- Lastly, the Mentor Buddy Program was a support system where a new employee who's on worker-owner track (buddy) was teamed up with a worker-owner employee (mentor) who supported him/her throughout the year making sure they were enjoying

his/her job, learning about the cooperative, understanding their manual, and completing the curriculum. However lots of times mentor and buddy teams came out of different offices and because of the lack of technology and resources, mentors were not able to fully give the time and commitment to their buddies and thus the buddy was left with less support.

- In the end this lack of participation and education, lead to withdrawal of the cooperative and unity. Lower retention rates of employees, lead to less equity building for both the company and employees.

With all of these problems, worker-owner track employees were not able to get the proper education and resources prior to their worker-ownership vote. Even current worker-owners missed out on continuing educational opportunities and participation because of the lack of technology like video broadcasting and conferencing, time zone differences, and off-site book and video libraries. Less trained employees lead to less marketing, promotions, and knowledge to the public about fair trade, coffee processing, and cooperatives. If an employee did not really understand how to properly brew coffee or explain the steps of fair trade in a producer country, then they could not meet the needs of their customers and the coffee producers. Also with the lack of knowledge combined with the lack of adequate technology like live broadcasting and on-site libraries, employees could not fully participate as worker-owners. Since worker-owners are the heart of Equal Exchange, less participation leads to fewer quorums at meetings and unification of the worker-owner body.

This table below represents the identified causes (problems) in the education/participation of Equal Exchange employees and shows the negative effects (outcomes). This table was derived from information gathered in the pre-survey and from observations and conversations among staff.

Causes	Effects
Too much responsibility and work for the Worker-Owner (W-O) Coordinator and Educ. Comm. Chair	Not enough is being done, not effective positions, not able to work on other projects, Worker-Owner Manuals are not updated and orientations are not given soon enough.
Not updated worker-owner manuals	Lack of knowledge about the governance matrix, EE and fair trade history, bylaws, etc.
No intranet access to non-West Bridgewater or Hood River employees	Lack of staff, quality, coffee, cooperative, and fair trade knowledge, less unification of staff and fewer marketing skills
Exchange Time videos inaccessible and not available on intranet	Lack of educated and trained employees, worker-owner track employees not completing curriculum
No on-site video or book library	Distant employees are marginalized by lack of on-site resources, leads to less cooperative participation
Mentor Buddy Program lacking support for separate offices	Mentor is not able to fully help out the buddy and therefore buddy does not receive proper support/guidance
Pre-recorded video broadcasting of meetings	Less participation, risk of not meeting quorum, lack of unification

Project Target Community:

This project targets 11 off-site employees who have been shortchanged by unequal access to education resources and participation opportunities at Equal Exchange. These employees whether they were on worker-owner track or were already worker-owners lacked resources, technology, and educational seminars that employees of West Bridgewater had. This gave them an unfair disadvantaged when it came to completing their curriculum and participation.

Stakeholder Analysis: * A = Direct Impact *B = Indirect Impact

Stakeholder	Stakeholder Interest(s) in the Project: Benefits (+) and Costs (-)	Assess. of Impact	Potential Strategies for Obtaining Support or Reducing Obstacles
Distant EE Employees	Very interested. (+) Will have access to on-site resources, increase education capacity, become more knowledgeable, level playing field, market products better, take more ownership of company, participate more; (-) more time will be spent on education and participation than before	A	<u>Participation:</u> Engage the distant employees in the creation of the survey (pre and post); Education Committee will communicate through conference calls. <u>Outreach:</u> Have monthly check-ins to see if things are going well. Let them know that this project is for them and was helped created by them.
All employees of EE (Worker-Owner Body)	(+) Increase in participation, secure quorum, unification of worker-owner body, better communication; (-) meeting times will change, require flexibility in schedules, less money spent elsewhere	A	<u>Participation:</u> Engage entire employee base for the creation of the survey (pre and post), explain the benefits of having more employees finish the education curriculum and having access to resources, report through bimonthly W-O meetings, have open Education Committee meetings where anyone can come and give advice and/or ask questions. <u>Outreach:</u> Find out what time works best for everyone to schedule mutual time meetings.
Education Committee	(+) More defined program, delegation of tasks to responsible appointed members, better communication with W-O Coordinator and W-O Body, more respect of program, budget spent – might lead to more resources next year; (-) Less money spent elsewhere for other projects, more time spent on this project and less on others, more work, more need for consistent dedicated members, more accountability and responsibility	A	<u>Participation:</u> Appoint positions to active members, task delegation, empower members with responsibility and room for innovation. Have monthly check-ins to make sure tasks are getting done. <u>Outreach:</u> Education Committee Chair will have more direction on what to report at bimonthly W-O meetings and will ask for feedback, meet with the W-O Chair more frequently for advice. Conference calls with distant employees for advice and check-ins.
Worker-Owner Coordinator	(+) Less responsibility, able to focus on more important and pertinent projects, better communication with Education Committee, creation of a sustainable position; (-) A lot of meetings with Education Chair at first to sort out positions and task delegation	A	Explain benefits of project to W-O Chair and obtain full support, find ways to involve W-O Chair and help make their job more sustainable. Work with W-O chair to design positions for Education Committee = less responsibility for W-O Chair position in the long run.
Equal Exchange as a company	(+) The more employees appreciate the company and its mission, the more they are willing to stay and build up their capital accounts, creating equity for themselves and for EE; employees who receive adequate education and training, will be able to market the products better and live the mission of EE	A	Explain benefits of project to EE at staff meetings, show employees the importance of internal capital account and why the capacity for equity is so important
Other Cooperatives	(+) Will have the EE model and experience to use for their own growing regional offices	B	Write up an evaluation of project in a year to determine effectiveness and if proven beneficial to the cooperative, make this model accessible for other cooperatives to use.
Cooperatives near distant employees	(+) Increase in membership and equity, communication and opportunity to learn from EE's experience (-) Funds used that could have been used for something else	A*	Allocate Education Committee budget for members to join other cooperatives if desired, explain reasoning to the other cooperatives.
Public/ Customer base	(+) Better customer service for customers, EE employees know product line better, able to communicate better, public is better educated about fair trade, coops, quality, coffee, etc.	B*	<u>Outreach:</u> Spring 2006 write up article on evaluation of project for EE's bi-annual Java Jive Article for public to see what Education Committee has been up to and how dedicated EE is to the employees.

Project Goals in Community Economic Development Terms:

Summary: Technology development, increase in education capacity, increase in participation, and more unification of cooperative.

Cooperatives like Equal Exchange live by seven principles (see Appendix B for a full listing). There are a few of these principles that talk about the education, participation, and economic situation of the members:

- Voluntary and Open Membership
- Democratic Member Control
- Member Economic Participation
- Education, Training, and Information
- Concern For Community



Cooperatives are successful because they allow the members whether they are producers, consumers, or worker-owners to exercise their ownership rights as members. They promote the idea of true democracy, since they are “owned by those who work to make them prosper, and controlled by those same persons on the democratic principle of one person, one vote”. Unlike most traditional businesses, cooperatives serve to nurture “widespread well-being rather than making a few persons well-off” (Adams and Hansen, 1992, p. 1). Equal Exchange does follow this model, however with the exceptional



The EE Library in its new home in West Bridgewater

growth the “widespread well-being” was starting to focus on one particular office, and not the overall membership. In order for members to have had real democratic control, they must have participated and in order to fully participate they must have been knowledgeable about the issues and have had a fair playing ground. If some members could attend meetings and have full access to video and book libraries while other members struggled to meet the basic requirements, then this created a disadvantage to those members who did not have the same level of access.

“Education, Training, and Information” were all big parts of making sure worker-owner track employees were ready for their membership vote. If they hardly met with their mentor, had not finished their curriculum, and had yet to participate in a meeting, then they were not ready to be worker-owners and this hurt the company. Having employees who were well-educated on the issues, participate in the meetings, vote on new employees, and understand the principles of fair trade, coffee processing, and cooperative structures means that Equal Exchange’s employees would have more true ownership and responsibility over the company, be more dedicated, more unified, and

would be able to market the company's image and mission to the public on a much higher level. Better marketing would lead to increase sales and appreciation for this type of *viable* alternative business. Also the longer employees remain in the company, the longer their internal capital accounts built up and created equity for both Equal Exchange and themselves.

The Education Committee hoped to identify the lack of resources, knowledge, and participation by conducting a survey for all regional employees. The survey was used to find the common problems, themes, requests by the regional employees so their needs could be evaluated. The results of this survey led the Education Committee on the next steps to take. By the end of Spring 2006 the Hood River, Oregon and the Madison, WI offices both had onsite video libraries consisting of every Exchange Time topic on DVD, had many of the Exchange Time videos online available to download for employees who were not out of any of the three main offices, had all the new orientations digitalized and in PowerPoint available to download online, updated and online worker-owner manuals, and with a new video camera had the ability to video broadcast the Worker-Owner, Board, and staff meetings online to those regional offices so they could more fully participate. *See Appendix G for Conventional Corporation Structure v. EE Model: Cooperative Corporation.*



An Exchange Time video Library

Below is the summary of the steps the project took to achieve a positive outcome:

(a) Outline of Goals:

- Increased worker-owner education of members in regional offices/distant locations
- Increase participation among distant employee membership

(b) Definition of Goals:

- Goals were defined by the big picture (long-term) development and the project objectives are what are needed in order to achieve this dream.

(c) Assess the feasibility:

- Deadlines were set to see if they were met
- Education Committee continued to meet to assess needs/advances, etc.
- Conference calls were hosted with distant employees to hear their feedback
- Reported progress to the worker-owner body at every-worker owner meeting (bi-monthly)

(d) Project Verification:

- Pre-Survey was conducted in Spring 2005 that determined the needs, desires, problems, common themes, and other advice of the remote employees

- Then in Fall 2007 a similar survey was conducted that determined if needs/desires were met, and if employees felt more ownership, educated, and participated more
- Library check lists were looked at in the Hood River and Madison offices to see if Exchange Time videos were watched and books were checked out (this was being implemented at the time this project reported)
- Compared quorum numbers of previous worker-owner meetings to future meetings to see if more members participated in the meetings (this was just being implemented at the time this project reported)
- Discussions were held at worker-owner meetings to see if there was still institutional support and progress being made
- Compared previous curriculum checklists to future years of new members to see if more distant employees were now able to complete curriculum (this was not implemented at the time this project reported)

Project Objectives:

Goal I: Increase education of members in regional offices/distant locations

<u>Objective 1: Improving the Education Committee (May 2005)</u>		
Input	Date	Person Responsible
Working with the Worker-Owner (W-O) Coordinator on what their position's real needs are from the Education Committee	4/26/05	W-O Coordinator and Education Committee Chair
Outline job positions and duties of Education Committee members	4/27/05	Education Committee Chair and Committee Members
Approval of the new job positions from the Worker-Owners	5/5/05	All Worker-Owners
Appointing people for the new positions	5/25/05	Education Committee Chair
Education Committee Chair meets with W-O Coordinator on 2005's worker-owner budget and lists money available for purchasing technology and resources	April – May 2005	Education Committee Chair and W-O Coordinator
Learning from other cooperatives who have regional offices	May – Winter 2005	Education Committee
Having a regional-office employee on the Worker Owner Cabinet to work directly with the Education Committee Chair on issues such as regional office cooperative education/training, time/schedule problems, mentor program, orientations, manuals, etc.	Spring 2006	W-O Coordinator
<u>Objective 2: Find out real needs, desires, wants, advice from distant employees and then evaluate a year later (April/May 2005)</u>		
Input	Date	Person Responsible
Create and conduct pre-survey to 11 distant employees	April – May '05	Education Committee Chair
Create and conduct post-survey to unknown # of distant employees	September 2007	Education Committee Chair

Objective 3: Have on-site book and video libraries (Winter 2005)		
Input	Date	Person Responsible
Burning DVD copies of all (historical, important, unique, high quality) Exchange Time videos	January 2006	Exchange Time Coordinator
Recording all future Exchange Times and burning to DVD	January 2006	Exchange Time Coordinator (Education Committee Chair if absent)
Ordering most important books (Top 5) for Hood River and Madison	December 2006	Librarian
Mailing DVDs and books to Hood River and Madison	February 2006	Exchange Time Coordinator and Librarian
Have checklists available for West Bridgewater employees to use to monitor usage	Fall 2007	Librarian and Exchange Time Coordinator
Purchase new camcorder that has high quality sound recording and visuals	October 2005	Exchange Time Coordinator and Education Committee Chair
Give internet access to employees not out of Hood River or Madison so they can download and watch videos online	Not Implemented	Exchange Time Coordinator
Purchase a DVD recorder/burner that is compatible with both the old VHS camcorder, VCRs, and the new camcorder	December 2005	Exchange Time Coordinator
Watch and list important previous Exchange Time videos to put on DVD and after recording to DVD, distribute to regional offices	January 2006	Exchange Time Coordinator
Objective 4: Updated Worker-Owner Manuals and available for download (Spring-Winter 2005)		
Input	Date	Person Responsible
Working with Governance Committee, Personal Committee, Marketing Department, Board of Directors, Worker-Owner Coordinator, Management Team and others to update relevant sections of the Manual	Summer-Winter 2005	Education Committee Chair and W-O Manual Coordinator
Working with the Marketing Department to get Manuals uploaded onto the Intranet	Fall 2005	Education Committee Chair and W-O Manual Coordinator
Most relevant parts of manual (Personnel Policy, Governance Matrix, History of Fair Trade and EE, and By-laws) will be translated to most needed 2 nd language (Spanish, Portuguese, or Cape Verde Creole) for 2 nd language employees Personnel Policy, History of EE, and Annual Report, other documents not implemented	Spring 2007	Education Committee Chair
Objective 5: Improving Mentor Program (August 2005)		

Input	Date	Person Responsible
Finding new ways to have mentors and buddies from different offices able to meet and finish curriculum	Summer-Winter 2005	Mentor Program Coordinator
Revamping Mentor Program all together, bring outside expertise from other cooperative mentoring programs	Spring 2006	Mentor Program Coordinator
Have at least 2 large social/education events each year for mentors and buddies to work together, company-wide (Mentor Buddy Breakfast and Co-op Month Activity)	Fall 2005	Education Committee Chair, Education Committee Members
Updating/changing curriculum to contain relevant/needed education training and also to list the top 4-6 prioritized Exchange Times	Feb. 2007	Exchange Time Coordinator
Objective 6: Digitalizing new employee orientations and having them available online (Summer-Winter 2005)		
Input	Date	Person Responsible
Getting volunteers to type up all orientations and putting them in PowerPoint	Fall 2005	Orientation Coordinator
Record orientation to use for training purposes for regional offices, new orientation givers	September 2005	Orientation Coordinator
Working with the Marketing Department to put them up on the intranet available for download	Winter 2005	Orientation Coordinator

Goal II: Increase participation among distant employee membership

Objective 1: Employees understanding the cooperative model better (July 2005+)		
Input	Date	Person Responsible
Allocating funds (Education Committee pays for it) for distant office employees to join other local cooperatives to experience more cooperative participation	Not Implemented	Education Committee Chair
Education Committee researches with distant office employees on what local cooperatives are available to join and decide together which ones to allocate money for membership	Not Implemented	Education Committee Chair
Large group of West Bridgewater employees attend Eastern Conference on Workplace Democracy in Manchester, NH to learn about what other coops are doing and how to bring viable coop techniques back to Equal Exchange	July 2005	W-O Coordinator, Outreach Ombudsman
Education Committee Chair reports back on different learning levels/possibilities to Education Committee, and discusses how EE should consider other approaches to education/training	August 2005	Education Committee Chair
Two Equal Exchange employees attend the West Coast Coop Conference to learn about what other coops are doing and how to bring viable coop techniques back to Equal Exchange	October 2005	Outreach Ombudsman
Continuing to encourage employees, especially remote employees to attend Co-op Conferences; Exchange Times are given to all staff on the experience and materials are shared	2006, 2007	Outreach Ombudsman, Education Committee Chair, Worker Owner Coordinator
US Federation of Worker Cooperative Conference (NYC) Eastern Conference for Workplace Democracy (Asheville,		

NC)		
Recommendation of other types of learning/teaching capacity with references be given to all staff to encourage more small groups, popular education, etc. when doing training/presenting	March 2006	Education Committee Chair
Education Committee Chair volunteers to speak at workshops and panels on EE's education program	2006, 2007	Education Committee Chair
US Federation of Worker Cooperative Conference (NYC) Eastern Conference for Workplace Democracy (Asheville, NC)		
Objective 2: Live broadcasting of meetings (January 2006)		
Input	Date	Person Responsible
Purchase new camcorder and computer equipment	September - November 2005	Exchange Time Coordinator and Education Committee Chair
Having meetings at mutual time-zone compatibility (afternoons instead of mornings EST)	January 2006 and continuing to be implemented	W-O Coordinator, Exchange Time Coordinator
Letting regional offices conduct Exchange Times and have them broadcasted to Madison and West Bridgewater (vice-versa)	October 2007	Exchange Time Coordinator

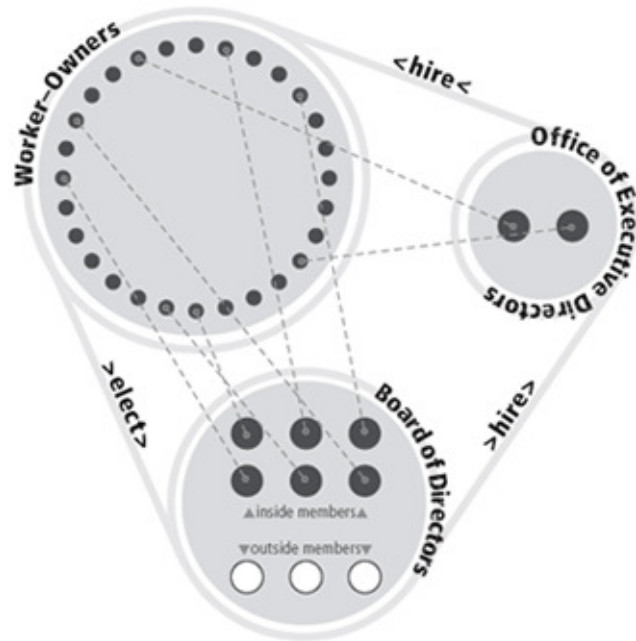
The Education Committee was able to meet many of the objective dates and fulfill the prerequisites because of its annual budget, communication with the W-O Coordinator, dedicated eight members and the five new positions, monthly meetings, and bimonthly reports to the Worker-Owner Body, and support and enthusiasm from regional offices.

III. Project Design

Review Of The Literature:

Equal Exchange, like most worker-owned cooperatives which “exist primarily to provide employment to their member-employees,” was also in a unique position because it also existed for another reason: to market and sell fair trade products in the United States (Honigsberg, etc. al., 1991, p. 32). Not only was the company trying to make it viable for its employees but also for the lives of thousands of small farmers throughout the world. Since most of the fair trade producers who supply the coffee, tea, and chocolate come from cooperatives, Equal Exchange's founders decided a long time ago that it only made sense to be a cooperative as well. Being structured the same way showed its solidarity with the producers and acknowledged that “cooperatives have been a means for farmers to get a better deal in the marketplace” (Nadeau and Thompson, 1996, p. 13).

Education and training on coffee growing and processing, quality, producer profiles, governance, fair trade, specialty coffee, and cooperatives were all important subjects to every employee of Equal Exchange. Membership education is essential for many cooperatives to survive, especially worker-owner cooperatives where employees make the decisions, vote on membership, and at the same time are promoting the products/services of the company. Having an education program and many opportunities to participate in the decision-making process creates a positive workforce. “The organizational setting in which we work has a very powerful influence on the way in which we view our jobs, and possibly other aspects of our lives” (Webb, 1986, p. 11). Employees might ask themselves, “is Equal Exchange a long-term career decision for me? Am I an empowered worker? Do I have true ownership in this company? Is this worth the hard work?” Since this project focused on a long-term educational and training program with increased participation, the Education Committee hoped to have all positive answers for those questions. The idea was to create a workplace that offers “awareness, authenticity, congruence and commitment at work” (Clock and Goldsmith, 2003, p. 277).



Equal Exchange Decision Wheel

Just like with other cooperatives such as Ace Hardware, members at Equal Exchange get together to discuss “problem solving...training and education” (Nadeau and Thompson, 1996, p. 28). Training and education among membership is vital to cooperatives staying competitive in the marketplace and having knowledgeable staff. Equal Exchange knew this and wanted to strengthen “the professional capacity of our membership” (Nadeau and Thompson, 1996, p. 30). When it comes to worker cooperatives, one thing they do best is “democratizing knowledge.” This is because cooperatives realize that having educated employees is a smart business decision. “When workers own the factory or their jobs, what they learn adds directly to their ability to control work and their own enterprises. Education becomes one means to achieve economic self-governance. If economic aspirations are to be fulfilled, then learning must be continuous” (Adams and Hanson, 1992, p. 167). Each objective the Education Committee had was key because “every increase in democratic approaches to leadership creates an expanded sense of ownership, empowerment, and competency on the part of employees and a diminished sense that autocratic managerial elites are required to run organizations” (Clock and Goldsmith, 2003, p. 283). Employees would learn how to make financial, governance, sustainable, and cooperative valued decisions through the education and training programs that were offered. This was why the Education Committee worked to have such a good on-going education curriculum.

Worker-Owner Track employees were asked to complete as much of the curriculum as possible during their first year, and worker-owners were also given the opportunity to go to Exchange Times each Thursday to learn new things or have their memories refreshed with another presentation on a particular topic. The curriculum was developed over years based on experience and knowledge that was categorized into specific topics. People with this experience and knowledge were then asked to teach the topics, because “once categorized it can be taught” and on-going educational topics were able to be repeated each year (Adams and Hanson, 1992, p. 168). It is well-documented that the “lack of education has been identified repeatedly as one of the single most frequent causes for cooperative business failure” and looking at long-term cooperatives like Mondragón as an example, their “effective workplace education has contribute directly to the success” of their cooperatives (Adams and Hanson, 1992 p. 167).

Participation is critical to ensuring viability and support among the cooperative’s base. “A number of major studies have found that the earnings of employee owned firms are superior or equal to those of conventional companies, and that employee ownership contributes significantly to productivity and performance when it is accompanied by employee participation in decision making” (Logue et. al., 1998, p. 78). If the Equal Exchange employees understood the importance of fair trade and cooperative workplaces, then they were more likely to market their products better and strive harder because they believed in the mission of the company. Not only did the employees believe in the mission but also took on the responsibility and ownership for the success or downfalls of the company, because they themselves were owners and they knew their performance influences the outcome of the company’s viability. Employees were able to get this understanding through education and training so long as the members “insure that any education or training program derives from their collective interests and needs.” That was why the curriculum contains topics that are relevant to being an employee at Equal Exchange, but diverse enough to give a good rounded education to each employee regardless of their department or position.



EE employees participating in a Co-op Month activity

Like any good education program at a cooperative, Equal Exchange’s contained “vocational, performance, political, and cultural elements” (Adams and Hanson, 1992, p. 168). Through this strong education program Equal Exchange ensured that it would “affirm the development of people, the building of self-confidence and the achievement of personal competence as an integral part of their social goals.” Through this, “individuals assume responsibility for their workplaces; through self-defined education, workers gain control over what is to be learned, when, and how” (Adams and Hanson, 1992, p. 169).

Since each cooperative is different throughout the world, “there is no single blueprint for how to involve employees” for Equal Exchange to learn and model from;

however through innovation in the Education Committee by studying other cooperative models and having continual conference calls with regional offices, Equal Exchange was able to “develop its own system that fits its culture, management, and workforce” (Logue et. al., 1998, p. 78). The workforce of Equal Exchange is unique because of the growing number of remote employees and regional offices, so the committee looked at larger cooperatives like Mondragón to see how they are able to train, educate, unify, and create room for participation among their distant offices. It is important to understand how these other companies work towards “company-wide communications” which makes sure that all the employees:

- “Understand the mission of the organization,
- Inform everyone about the performance of the organization, and
- Understand customer needs”

All of these attributes will “build strategic unity, overcome resistance to change, build organization capabilities, and improve customer satisfaction” (Logue, et. al., 1998, p. 88). “Successful organizations today are those that get, manage, and distribute knowledge and training the fastest and at the least cost” (Patterson, 2003, p. 20). In the case of Mondragón they too were emphasizing education and increasing their capacity. “In recent years, Mondragón has placed great emphasis on strengthening its educational institutions” in order to have and attract skilled competitive employees (Whyte and Whyte, 1991, p. 215). Larger cooperatives like Mondragón and Equal Exchange were realizing the importance of education and training of their membership in order to remain



Co-op Month Jeopardy Activity

competitive, foster new ideas and entrepreneurship, as well as retain good skilled employees. Studying employee training manuals like that of Burley Design Cooperative provided examples of communication, capacity for participation, and methods of training and education which influenced the Education Committee of Equal Exchange. In studying Hanover Consumer Cooperative Society the committee learned that “participation by members in the decisions of a co-op is vital to its success” and “its vital co-ops creatively search for ways to get members involved” (Zimbelman, 1997, p. 58). The Education Committee through this project figured its own creative ways to get members involved because it learned how vital participation was. Burley Design Cooperative’s Manual is very similar to that of Equal Exchange. Burley Design goes on to say that they, “have studied and taken inspiration from the successes of Mondragón co-ops” similar to that of Equal Exchange (Eicher, 1991, p. 2.3.3).

It was beneficial to not only study the policies that Mondragón had in place such as the pay ratio, capital accounts, etc. but also we learned from their educational experience and training programs. Equal Exchange was experiencing what Mondragón experienced years ago and that is the need to “adopt the equilibrio” to try to balance “the economic and technological imperatives with social values and objectives” (Whyte and Whyte, 1991, p. 296). Mondragón learned that “an organization is not solely a technical system or solely a social system, but rather a sociotechnical system...Improved performance and increased commitment by the members to the organization cannot be achieved simply by changing technical systems or by changing human relations” (Whyte and Whyte, 1991, p. 220). Equal Exchange needed to not only develop better equipment and hire better management, but it also needed to focus on developing itself internally and finding ways to empower employees to be entrepreneurs and business owners. As Mondragón and Equal Exchange have discovered, when “cooperatives become larger and more complex, developing and maintaining a democratic, participative organization becomes increasingly difficult” (Whyte and Whyte, 1991, p. 225). This is why the Committee has taken on the task of helping regional employees increase their education and participation as a serious endeavor for Equal Exchange. A worker co-op of almost two hundred people, Rainbow Grocery in San Francisco has a Mentor Program similar to that of Equal Exchange, however when it comes to participating in meetings and making decisions they tend to meet more often in a department rather than as a large group. They also don’t have any other offices, so regional issues are not a problem for them.

Another large cooperative the Committee looked at was the Cooperative Health Care Associates (CHCA) in New York City who are used to working with multiple locations. They have a good retention rate and Mentoring Program and have a lot of internal hiring. They remind Equal Exchange that “giving worker-members a stake and a say in the company provides both financial incentives and a sense of involvement” (Nadeau and Thompson, 1996, p. 53). Just like at CHCA, EE wanted to create fun and likable training and it developed its “own method of hands-on demonstrations accompanied by peer teaching. Having workers actively participate ensures that training remains lively and engaging.” Good quality training like this gave Equal Exchange the ability to “stand up to stiff competition” and was the reason for its “high-quality performance” similar to CHCA (Nadeau and Thompson, 1996, p. 54). The majority of Equal Exchange’s training was done internally by other staff members who continued to teach new staff through the experience and expertise of seasoned staff. In addition the teachings were usually done by other staff who know the needs and participation levels of their fellow coworkers, so the trainings were done in a fun and engaging manner, with respect to different teaching methods – large visuals, handouts, activities, games, and questions and answers. Instead of just focusing on the end result, the Education Committee encouraged presenters to shift their focus to also include the process. “Most instant trainers spend all their time preparing the content of their training session, and pay little attention to the process parts. As a result their presentations are often somewhat boring, with little audience interaction” (Charles and Epstein, 1998, p. 14). The presenters also tried a variety of teaching methods similar to the model of popular education. Discussions and debates emerge after each presentation to exchange thought provoking ideas. The presenters who served as moderators understood that “conducting

this program effectively requires more than a lecturer” (Pressel and Gardner, 1992 p. 147). *See Appendix I for the Worker Owner Curriculum Check-list.*

Similar to EE, other cooperatives like the Alvarado St. Bakery have “quarterly membership meetings” at “which members can participate in discussion on a wide arrange of issues” (Nadeau and Thompson, 1996, p. 57). This was why it was so important for the Committee to continue to communicate to the staff about its project to get their input and feedback. Having a clear structured and reorganized Education Committee and Worker-Owner Cabinet was a positive outcome because “structure means employee-owners are better informed about the company and more dedicated” since they knew now how to join one of these committees, who to talk to about a specific issue, and who was accountable to get things done similar to the process at the Bookpeople’s Cooperative (Nadeau and Thompson, 1996, p. 61). *See Appendix H for Education Committee Appointment Policy.*

CHCA also has much of their training in dual-languages which is something the Committee started to look at in the latter part of this project here at EE with its expanding Spanish and Cape Verdean Creole population (Nadeau and Thompson, 1996, p. 54). It was very difficult for employees even in the West Bridgewater office to participate when English was not their first language. Though it was not one of the original objectives in this project the Committee did end up focusing on translation and interpretation for the non-native English speaking employees that increased their participation as well.

The thought of encouraging the regional offices to join other cooperatives was because the Committee figured this “combination gives consumers [in this case worker-owners] a strong image of local ownership and regional strength, combined with national capacity” (Nadeau and Thompson, 1996, p. 43). Belonging to a large national cooperative like EE but at the same time working with local groups would help regional offices feel a sense of community in their region and create a unique sense of identity. However later on it was discovered that there were not many local co-ops for regional employees to join, so instead they were encouraged to attend cooperative conferences. Equal Exchange staff attended conferences not only to learn from others but also recognize the positive influence it had on start-up cooperatives or cooperatives struggling to maintain their membership. The heart of this mission comes from the idea that “cooperatives are committed to their communities” and at Equal Exchange it defines the co-op community as one of its own (Nadeau and Thompson, 1996, p. 40). The Worker-Owner budget purposely allocated funds each year to sponsor the cooperative conferences and used the staff to speak at some of the panels and workshops. *Sample PowerPoints for these sessions can be found in Appendix J for the USFEDCOOP Presentation and the ECWD Power Point Presentation*

Program:

The Education Committee worked with the W-O Coordinator as well as other departments to purchase technology like a DVD burner, new camcorder, new DVD player, and online live broadcasting systems with its annual budget. The Committee made sure that the Hood River and Madison offices had full Exchange Time video libraries (through the burning and distribution of DVDs), available books (Top5 each year), and the capability to broadcast their own Exchange Time. The Committee also

worked with many committees and departments to update the Worker-Owner manuals and had them uploaded online as well as new employee orientations. It asked that Exchange Times and bi-weekly staff meetings be changed to a more mutual time-zone so that other offices not on Eastern Standard Time could participate and watch live. Also it studied other models used by cooperatives and non-cooperatives to see how they have membership participation and education programs for non-regional staff. Overtime it implemented some of these programs that were learned from these companies. In addition it encouraged full cooperative participation among members and allocated money for non-West Bridgewater employees to join other cooperatives to increase participation, which eventually switched to sending staff to cooperative conferences instead.

Education Committee's Mission Statement:

“The Education Committee of the Board exists to advance Equal Exchange’s Mission and Guiding Principles through staff education. It aims to develop competent and engaged worker-owners through the worker-owner curriculum and provide a dedicated space for continuous learning. Our tasks have included: coordinating exchange times; maintaining a useful and accessible worker-owner curriculum; providing input about staff retreats; assigning mentors to new staff on worker-owner track; creating ways for non-West Bridgewater employees on worker-owner track to complete worker-owner trainings, and reviewing and updating the Worker-Owner manual.”

Project's Mission's Statement:

“The Education Committee will seek to ensure that all worker-owner and worker-owner track employees of Equal Exchange will have access to completing the education curriculum on time, have equal levels of participation in meetings and sessions, and will have resources available on-site to borrow and/or download. The Education Committee seeks to do this by making sure worker-owner manuals are updated more frequently and available online to download, both the Hood River and Madison offices have video and book libraries consisting of all Exchange Time videos on DVD, an improvement of the Mentor Program to fit the needs of mentors and buddies from different offices, live broadcasting of Exchange Times and meetings, available technology for other offices to host Exchange Times, digitalizing all new employee orientations and having them available online to download, opportunities for non-West Bridgewater employees to join other local cooperatives to increase their understanding and participation in the cooperative model, and encourage full participation and quorum in Worker-Owner meetings from all employees.”

Participants:

At the time of this project there were 11 non-West Bridgewater full-time employees. Most of these members were worker-owners but a few were on worker-owner track. Three new employees were soon to-be-expected to work out of the Madison office, while six worked out of the Hood River office. However out of those six, only three were in the office everyday because some of the employees were on the road or lived far away. Also one employee lived in Vermont, one in Washington, another in California, and one in Maine. These employees visit the West Bridgewater office at least once, if not twice a year – for the Annual Retreat and sometimes Board and department meetings.

- John Roper of Hood River, OR: Capital/Operations Coordinator [W-O Track]
- Brian Henry of Hood River, OR: Customer Service Coordinator/DSD Manager (W-O Track)
- Jim Feldman of Portland, OR: West Coast Sales [W-O Track]
- Tom Hanlon-Wilde of Hood River, OR: West Coast Sales Manager [W-O]
- Roxanne Magnuson of Lyons, OR: Natural Foods Sales [W-O]
- David Owens of Tacoma, WA: Direct-Store-Delivery (DSD) [W-O]
- Ian Sitton of Boulder Creek, CA: Natural Foods Sales [W-O]
- Alistair Williamson of Portland, OR: Capital Coordinator [W-O]
- Ron Arm of Madison, WI: Direct-Store-Delivery (DSD) [W-O Track]
- Kevin Hollender of South Royalton, VT: Food Service [W-O]
- Bill Holt of Westbrook, ME: DSD [W-O Track] *

* W-O = Worker-Owner

Community Role:

The community was involved through a variety of ways. The project first started when during an Education Committee report to the Worker-Owner body, two worker-owners expressed their concern that distant office employees were not receiving Exchange Time videos on time and were disadvantaged with regard to education resources. The Education Committee immediately responded by asking for more feedback from the worker-owner body and encouraged them to email the Education Committee Chair. Then at the next Education Committee regular meeting, regional office employees were asked to call in to the meeting to offer feedback. One employee did call-in and talked with the Education Committee about his experience and gave advice for about 40 minutes. After that, the Education Committee decided to create a survey and emailed all the employees and even faxed regional offices to make sure they got it. Around seven responses were received that were used to create the questions for the surveys. Many of the email responses were from regional office employees. Then the Education Committee created a survey, sent the survey for a final review to the distant office employees via email and then after a few editions it was put up at <http://www.surveymonkey.com> and the eleven distant office employees were asked to fill out the survey in a timeframe of three weeks. The Education Committee looked over all the results of the survey and wrote up the common themes, problems, patterns, etc. that

were going on. After that, the Education Committee Chair reported the upcoming projects for the summer to tackle these problems. The report was given at the Annual Worker-Owner meeting on May 5, 2005 where it got approval of the new project and job positions. The community of employees had the opportunity to give feedback and at every bimonthly Worker-Owner meeting where the Education Committee Chair reported back to the Worker-Owner body on progress being made, new obstacles to overcome, etc. The Worker-Owner body was always asked for feedback. Throughout the years of this project, conference calls, monthly check-ins, and emails went back and forth between the Education Committee and the regional office employees to track progress and to make sure things were going well.

Lastly in the fall of 2007 another survey was created by the Education Committee with staff input and feedback with a focus from the distant office employees that assessed and evaluated the project to see if beneficial steps had been made.

Host Organization:

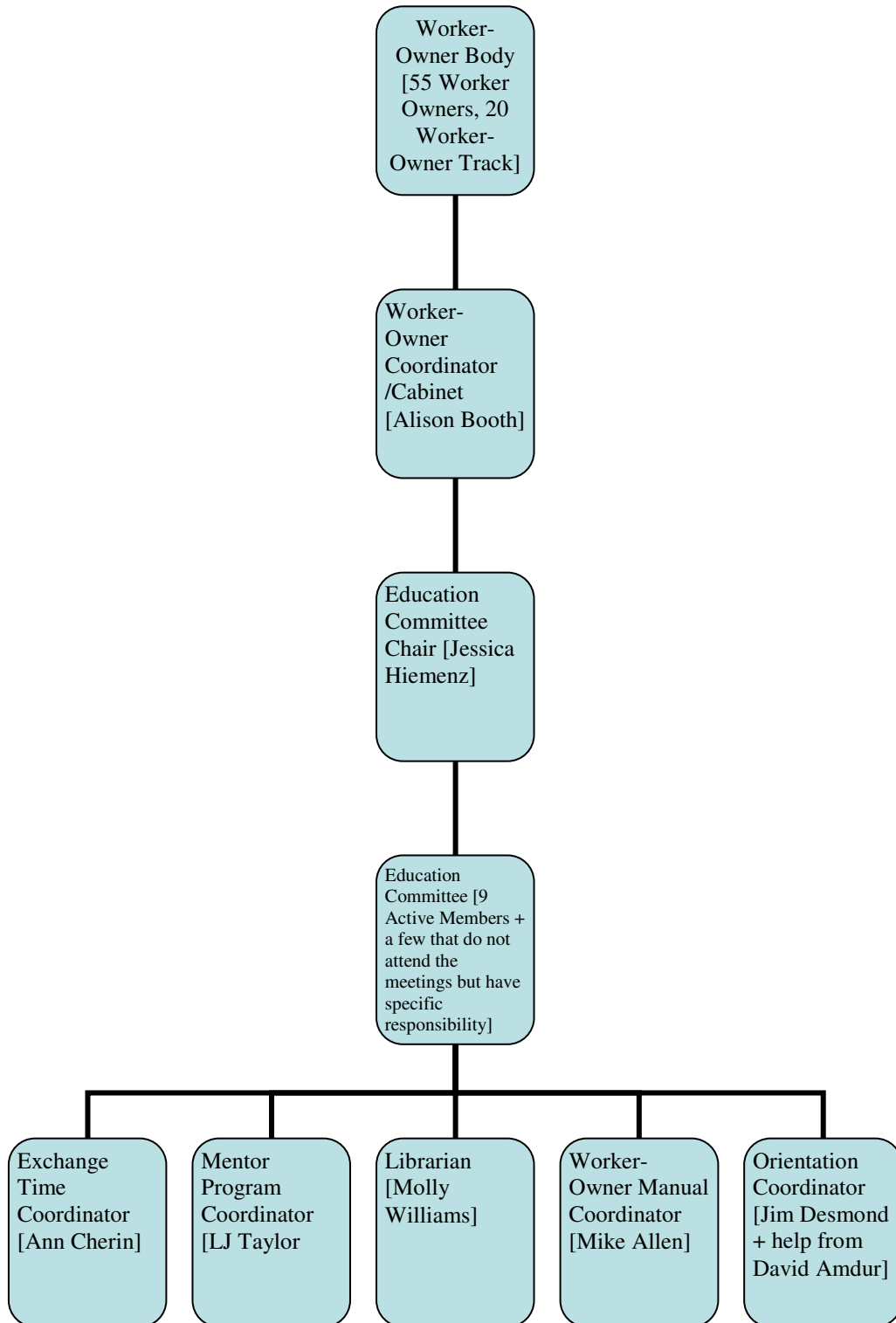
The organization piloting the project is the Education Committee with help from the Worker-Owner Coordinator.

Equal Exchange was broken into two main governing bodies. One was the Board of Directors, who was elected by the Worker-Owners and oversaw the Office of Executive Directors (OED). The Board was chaired by the Chair of the Board of Directors. The two committees reported to the Board were the Governance and the Personal Committee. The other governing body was the Worker-Owner Body since Equal Exchange is a worker-owned cooperative. The chair of the Worker-Owner body was the Worker-Owner Coordinator who was voted on by the Worker-Owners. One committee reported to the Worker-Owner Body and that was the Education Committee. Both governing bodies met to decide and vote on different issues. The Board was responsible for approving the annual budget and supervising the OED, while the Worker-Owner Body was responsible for voting on membership and certain policies that affect the entire company.

The Education Committee used to be a committee of the Board but because it was directly impacting the worker-owners and was created for the benefit of the worker-owners, it was decided upon in 2002 to move it to a committee of the Worker-Owner Body. Since then the Education Committee Chair has been appointed by the Worker-Owner Body or the previous Education Committee Chair. The Education Committee Chair gives a 10-15 minute report to the W-O Body at every bimonthly meeting. During this project, the Education Committee had eight members – one being the Education Committee Chair and another was the Worker-Owner Coordinator who was required to sit in on the meetings. Under the old Education Committee Chair there was only one assigned position which was the Exchange Time Coordinator, the person who organized and scheduled speakers to present a variety of topics every Thursday morning for the education curriculum requirement. There were no other defined positions. In light of this project in 2005, the Education Committee changed their structure through the advice of the Worker-Owner Coordinator because previously the W-O Coordinator and the Education Committee Chair had too many responsibilities and not enough support. Both positions were unsustainable to manage along with the regular daily workload. Everyone

who had a position also had a full-time job with Equal Exchange such as a Sales Representative, Interfaith Liaison, Production, Quality Control, etc. Only 10% of their time was supposed to be used for other committees like the Education Committee outside of their regular job responsibility. So with the old structure it was impossible for the Worker Owner Chair and the Education Committee Chair to have so much responsibility. With this new structure, the Education Committee took on some of the responsibilities that had been designated to the W-O Coordinator and appointed members to these positions. Also a cabinet was formed under the Worker-Owner Coordinator which included the Education Committee Chair as well as a Treasurer, Minister of Membership Votes, Annual Elections, Outreach Ombudsman, and Agenda Agent. The Education Committee Chair worked with some of these cabinet members on projects like annual budget (with Treasurer), networking and learning from other cooperatives and presenting at cooperative conferences (with Outreach Ombudsman), and setting the agenda with the Agenda Agent. The Education Committee also created four new assigned positions to take on responsibilities and be accountable for specific tasks. This helped to take a lot of the workload away from the Education Committee Chair and empowered the new positions. *See Appendix C for Governance Matrix.*

Organizational Chart: The new 2005 Education Committee Body matrix:



All positions were fulfilled, and there were even non-position members who backed up and volunteered for extra activities. Most group decisions were made by a consensus-basis, with the Chair having the final say. All financial decisions were approved by the Chair, as well as the Worker-Owner Coordinator and financial requests were signed off by the Worker-Owner Treasurer.

The Education Committee Chair oversaw and was accountable for the five programs as part of his/her overall responsibility, however each particular position had a main contact person for these projects and was empowered to lead the program.

- The **Exchange Time Coordinator** worked to ensure that all historical, important, and new Exchange Times were filmed and burned on DVDs and sent to the Madison and Hood River offices for regional library setups. They also oversaw the purchasing of new technology.
- The **Mentor Program Coordinator** continued to oversee the entire program, but also focused on ways for mentors and buddies from distant offices to improve their communication and be able to finish the curriculum.
- The **Librarian** still did the biweekly *Bookspot* where they highlighted a book for members to read, continued with information quizzes, and oversaw the main library in West Bridgewater, but also made sure that libraries were setup in Hood River and Madison for the Top5 books.
- The **Worker-Owner Manual Coordinator** made sure that all sections of the Worker-Owner Manual were updated and available for download online.
- Lastly, the **Orientation Coordinator** made sure all new members had attended orientations, that orientations were typed up and put into PowerPoint and available online to download.

Method:

Improving the Education Committee (May 2005)			
Program	Participants	Responsibility	Implementation
Creation of a new and more responsible Education Committee	Worker-Owner Coordinator, Education Committee	Education Committee will now be accountable for all related programs with the libraries, Worker-Owner Manuals, Orientations, Mentor Program, and Exchange Times. This includes making sure orientations are typed up, put in PowerPoint, and available online to download; mentors and buddies no matter what offices they come out of are able to meet and finish curriculum, Worker-Owner Manuals are updated more frequently and available online to download, Exchange Time videos are burned to DVDs and distributed so that regional video libraries will be set	New positions in the Education Committee with job descriptions were appointed to active members in the summer of 2005, and now they are making sure the programs above are completed by Spring 2006. Education Committee worked with Worker-Owner Coordinator to allocate money for this project.

		up in Hood River and Madison, book libraries will be setup with the Top5 books in both Madison and Hood River, and meetings will be changed so that regardless of what time zone any employee in the US is part of, they will have the opportunity to watch and participate in the meetings/sessions through live video broadcasting. EE will prioritize education curriculum among its employees are being crucial to the development and economic capacity of the business.	
Find out real needs, desires, wants, advice from distant office employees (April/May 2005)			
Program	Participants	Responsibility	Implementation
Creation of a survey to assess the status for distant office employees	Education Committee, Worker-Owner Body, all EE employees	Education Committee was told that employees outside the West Bridgewater office are not receiving Exchange Time videos, lack onsite-resources, and are not able to complete their curriculum. Education Committee is responsible for all of these problems and worked with all the employees, particularly the distant office employees in the creation of a survey to access the status.	The survey was completed and the results are now in. The Education Committee outlined the common themes, problems, needs, and requests and presented it at the annual Worker-Owner meeting on May 5, 2005 and the steps it is taking to implement this project by Fall 2005.
Employees understanding the cooperative model better (July 2005+)			
Program	Participants	Responsibility	Implementation
Employees attend coop conferences	Equal Exchange employees who are able to attend coop conferences	Report back what they learned from the conferences to the staff of Equal Exchange.	Eastern Conference on Workplace Democracy was in July 2005 and 8 Equal Exchange employees attended. The West Coast Coop Conference in Sugar Brush was in October 2005, and two Equal Exchange employees attended. After the July conference, the Chair of Education Committee reported her findings to the Education Committee about cooperative education and methods of education and a discussion followed. The Committee agreed that Equal Exchange needs to have a diverse range of educational components – to reach out to everyone –

			visuals, audio, engaging activities, etc. Then a report through Exchange Time was given to the employees for an hour and a half and then a report to the Worker-Owner Body.
Encouraging distant office employees to join other cooperatives in their area	Remote office employees and Education Committee	Education Committee Chair meets with Worker-Owner Coordinator to determine how much money should be left to allocate funding for cooperative membership. Education Committee wants EE members to understand cooperative models and increase their participation.	Remote office employees are asked if they would like to have this opportunity. Education Committee will help to research local cooperatives in their area and together will agree upon which ones to allocate money for membership. Distant office employees will then be able to participate in these cooperatives to have a better understanding.
Remote office employees having access to participate			
Program	Participants	Responsibility	Implementation
Purchase new technology and move meeting times	Remote office employees, Education Committee, and Worker-Owner Body	Worker-Owner Body agrees to move certain meetings to more mutual time-zones. Education Committee purchases technology available so that distant office employees can watch meetings/sessions through live broadcasting over the internet. New technology purchased allows regional offices to host and film Exchange Times that other offices can watch.	Technology is purchased, some meeting times are moved, and regional offices are encouraged to participate.

Products And Outputs:

By the end of 2007 these products and outputs were accomplished due to this project:

- Digitalized orientations in PowerPoint available online to download
- Parts of the Worker-Owner Manuals updated and available online to download
- Parts of the Worker-Owner Manual translated and available to download
- Other education/training materials in 2nd languages purchased and distributed
- Book libraries in Hood River with Top5 books
- Video libraries in Hood River and Madison consisting of all historical, high quality, unique, or important Exchange Time videos on DVD
- All new Exchange Time videos on DVD in West Bridgewater
- All important/historical Exchange Time videos copied to DVD and distributed
- New and more responsible Education Committee
- Sustainable Education Committee Chair and Worker-Owner Coordinator positions

- Formal Education Committee Chair and membership appointment policy
- New DVD recorder, camcorder, and DVD player purchased in the West Bridgewater office
- New technology available for video broadcasting and conferencing
- Development of new Mentor Program to help mentors/buddies from separate offices
- Worker-Owner track employees finishing their education curriculum before their membership vote
- More educated employees of Equal Exchange with a better understanding of fair trade, cooperatives, coffee processing, and quality
- Unification of Equal Exchange employees
- More participation of Equal Exchange employees from distant office locations
- Appreciation and understanding of the company from employees
- Higher retention rate from employees, which leads to more build up of internal capital accounts (equity) for both Equal Exchange and the employees
- Public is more informed about fair trade, cooperatives, coffee, etc. because employees can now market themselves and the mission better
- All employees are encouraged to attend regional and national cooperative conferences and also present on topics about our co-op
- Other cooperatives now have the Equal Exchange experience to use as a model if they are dealing with regional offices
- Outreach to other cooperatives, Education Committee Chair presents at two co-op conferences
- Large cooperatives are proven to be viable in the United States' economy

IV. Implementation

Staffing Pattern:

The Worker-Owner Coordinator and the Education Committee Chair through the approval of the Education Committee came up with 5 new job descriptions or areas of most concern to the education of the worker membership: Exchange Time Coordinator, Librarian, Orientations Coordinator, Worker-Owner Manual Coordinator, and the Mentor Program Coordinator. The Worker-Owner Coordinator trained the Education Committee Chair on their new responsibilities and tasks. Then the Education Committee Chair worked with the Education Committee on appointing the new positions and trained them on the necessary skills and tasks in order to complete the job. The Education Committee worked directly with the Worker-Owner Coordinator and the Worker-Owner Cabinet. *See Appendix D for a full listing of job descriptions.*

Budget:

The W-O budget for year 2005 was \$3,000 of which \$1,000 was used to purchase new computer software to have online voting and discussions. Another \$1,000 was allocated for conference calls, *Putting Democracy to Work* books, Worker-Owner Manual costs (printing, outsourcing, etc.) and other Worker-Owner expenses. The

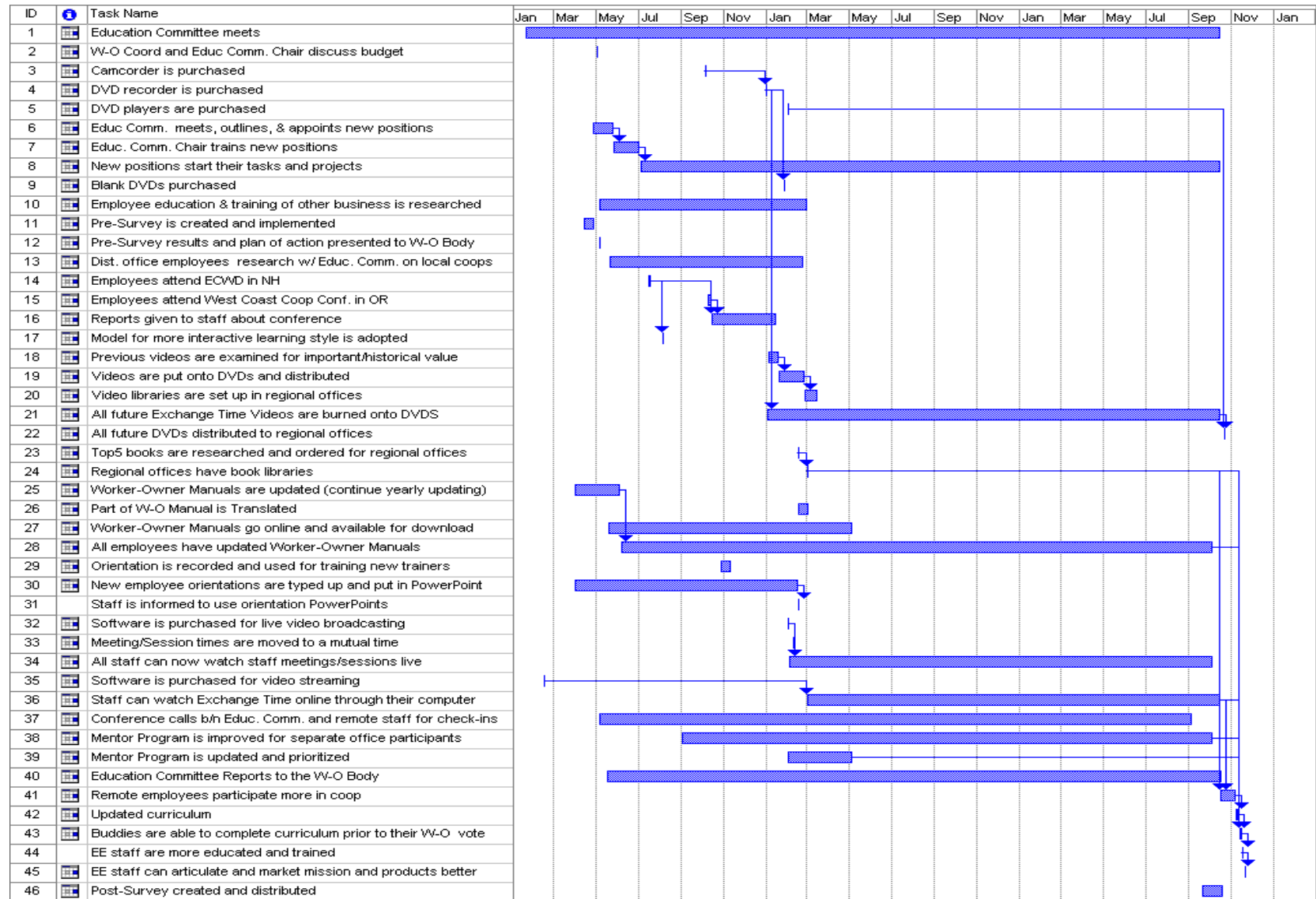
Education Committee was given \$300 to purchase a video camcorder and \$250 for a DVD recorder. Fortunately the Marketing Department purchased the video camcorder with the Education Committee, with them spending \$600 of the total costs. Both groups used it mutually. Another employee donated his stereo system for audio and Marketing purchased a new projector screen. Also a used DVD player was donated by a staff member. The Education Committee was still over budget, so some purchases did not happen until the Fiscal 2006 year.

The Worker-Owner budget for year 2006 was \$4,000 which was \$1,000 more than it had been the year before. Also \$2,300 of the \$4,000 was allocated for the Education Committee, leaving the remainder amount for conference calling and other Worker-Owner expenses. If conference calling was able to be reduced (which was the goal with a new phone system) then the extra \$1,000 could have been used for a retreat or more technology purchases. There was money allocated specifically for conferences/education training for Committee members, and also money allocated for the purchase of blank DVDS. In addition, the Committee also had access to another General Ledger (GL) account of \$4,000 which was used for books, publications, and miscellaneous. It achieved its goal to get permission from the overseer of this General Ledger and from the Finance Department to use this General Ledger for all its training materials such as Worker-Owner Manual inserts, books/videos for the library, blank DVDs, etc. The Worker-Owner Coordinator also asked for a Capital Expenditure of no specific amount of money, to be used to purchase technology that can broadcast videos/DVDs on the screen in the conference room. It was felt that since all staff and all departments would be using this technology and equipment regardless for just training/education purposes, then money outside the Worker-Owner budget should be used. *See Appendix E for a full listing of available funds and expenses in regards to salary, equipment purchases, and other expenses for yr 2005 and yr 2006.*

GANTT Chart: January 2005 to January 2008

The GANTT Chart below describes the different activities that took place and the outcomes that came out of the activities. The date each occurred is shown below with corresponding months above. The lines and arrows represent how certain activities influenced other activities and lead to predicted outcomes.

(Scroll down to next page)



V. Monitoring and Evaluation

Monitoring

This table indicates the monitoring actions that took place for each month of the project. Some monitoring tasks were weekly, while others were monthly, quarterly, or yearly. The initial project was supposed to take place between Fall 2005 to Spring of 2006. However because of delayed implementation and budget constraints, some activities did not happen until after the project reporting was done. Also some outcomes were not accomplished/revealed until after the project reporting; this is why October 2007 is at the bottom of the table to show when the final monitoring and evaluations should have taken place.

Month	Monitoring/Evaluation Action
May 2005	<ul style="list-style-type: none">• Survey results are released and plan of action is announced at W-O Meeting• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance• Keep track of quorum # at W-O meeting and of remote employees participation
June 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance
July 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance• Check-in with timeline to see if objectives are met• Keep track of quorum # at W-O meeting and of remote employees participation
August 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance• Check-in with timeline to see if objectives are met• Repot given to W-O Body at monthly meeting and feedback requested• Is project implemented by due date (everything purchased, videos and books sent, ready to go?)
September 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Keep track of quorum # at W-O meeting and of remote employees participation
October 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Staff asked for feedback on big October Coop Activity
November 2005	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Repot given to W-O Body at monthly meeting and feedback requested• Keep track of quorum # at W-O meeting and of remote employees participation• Keep track of curriculum check-lists of new worker-Owners
December 2005	<ul style="list-style-type: none">• Due to the holidays, no monitoring/evaluation was done
January 2006	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance
February 2006	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance• Repot given to W-O Body at monthly meeting and feedback requested• Keep track of quorum # at W-O meeting and of remote employees participation
March 2006	<ul style="list-style-type: none">• Monthly education committee meeting check-in to see if tasks have been done• Conference call to remote staff for a check-in and guidance• Look at video and book checklists at Hood River and Madison to determine usage

April 2006	<ul style="list-style-type: none"> • Monthly education committee meeting check-in to see if tasks have been done • Conference call to remote staff for a check-in and guidance • Keep track of curriculum check-lists of new worker-Owners
October 2007	<ul style="list-style-type: none"> • Monthly education committee meeting check-in to see if tasks have been done • Conference call to remote staff for a check-in and guidance • Look at video and book checklists at Hood River and Madison to determine usage • Post -survey results are released and evaluated to determine success of project • Keep track of curriculum check-lists of new worker-Owners
November 2007+	<ul style="list-style-type: none"> • Monthly education committee meeting check-in to see if tasks have been done • Conference call to remote staff for a check-in and guidance • Look at video and book checklists at Hood River and Madison to determine usage • Report given to W-O Body at annual meeting and feedback requested • Keep track of quorum # at W-O meeting and of remote employees participation

Manage Information Systems:

There was a pre and post survey created with input from all employees, implemented by the Education Committee, and filled out by the remote office staff. The pre and post survey were compared to see if satisfaction levels had risen, to see if needs/requests had been met, and problems had been fixed. Also continuing conference calls between the Education Committee with the distant office employees for monthly check-ins and seeing if the Education Committee was moving in the right direction took place. The Education Committee Chair reported back on the progress being made and programs implemented to the Worker-Owner Body and answered feedback and questions.

Lists for video and book checkouts were created and sent to Hood River and Madison to see if employees were watching and reading the books. Remote employees' curriculum checklists were compared before the project was implemented and after the project was implemented to determine if more remote employees were completing their curriculum prior to their one-year vote. Also number of participants (like quorum at meetings) was compared before and after project implementation to see if more members were attending and participating in meetings/sessions. Numbers of participants were always counted before meetings start to determine quorum. However because of delayed implementation and budget constraints, a lot of the monitoring and evaluation did not take place until after this project report was done.

Logic Model

Long-term Outcomes	<ul style="list-style-type: none"> • More equity built up for Equal Exchange • Longer retention rate for regional employees • Public is more informed about fair trade and cooperatives because employees can now market EE and themselves better • Co-ops are seen as a viable business and remain competitive 					
Intermediate Outcomes	<ul style="list-style-type: none"> • Regional employees understand the cooperative model better • Increased participation from regional employees • EE is seen as a role model for co-op education programs • Other co-ops see the importance of having an educational program • EE worker-owners are able to make educated decisions and votes 					
Short-term Outcomes	Educ. Comm. Is able to meet the	Regional employees	Regional employees are	New employees	Mentors are able to serve their	Orientations are more

	needs of regional employees access to participation Regional employees attend co-op conferences to learn and feel connected	are able to participate at most meetings live Regional offices are able to record and broadcast Exchange Times to West Bridgewater	able to finish their curriculum on-time Regional employees have access to resources on-site	get their manuals faster All regional employees are able to get updates faster	buddies better Buddies feel more supported and a stronger connection to EE	visually attractive and participatory Orientation Coordinator can give orientations to remote employees through online conferencing
Outputs	Improved Education Committee	Live Broadcasting of Meetings	On-site book and video libraries	Updated Worker-Owner Manuals and available to download	Improved Mentor Program	Digitalized new employee orientations and available online
Activities	Outline Job positions and duties of Education Committee Members Work with the Worker-Owner (W-O) Coordinator on what his/her position's real needs are from the Education Committee Approval of the new job positions from the Worker-Owners Appointing people for the new positions Learn from other co-ops who have regional offices Have a regional-office employee on the W-O * Cabinet to work directly with the Educ. Comm. Chair on issues such as regional office cooperative education/training	Purchase new camcorder and computer equipment Have meetings at mutual time-zone compatibility Let regional offices conduct Exchange Times and have them broadcasted to Madison and West Bridgewater	Education Comm. Chair meets with W-O Coordinator on 2005's worker-owner budget and lists money available for purchasing technology and resources Burning DVD copies of all (historical, important, unique, high quality) Exchange Time videos Recording all future Exchange Times and burning to DVD Ordering most important books (Top 5) for Hood River and Madison Mailing DVDs and books to Hood River and Madison	Working with Governance Comm., Personal Comm., Marketing Department, Board of Directors, W-O Coordinator, Management Team and others to update relevant sections of the Manual Working with the Marketing Department to get Manuals uploaded onto the Intranet Most relevant parts of manual (Personnel Policy, Governance Matrix, History of Fair Trade	Finding new ways to have mentors and buddies from different offices able to meet and finish curriculum Revamping Mentor Program all together, bring outside expertise from other cooperative mentoring programs Have at least two large social/education events each year for mentors and buddies to work together, company-wide (Mentor Buddy Breakfast and Co-op Month Activity) Updating/changing curriculum to contain relevant/needed education training and also to list the top 4-6 prioritized Exchange Times	Getting volunteers to type up all orientations and putting them in PowerPoint Record orientation to use for training purposes for regional offices, new orientation givers Working with the Marketing Department to put them up on the intranet available for download

	<p>, time/schedule problems, mentor program, orientations, manuals, etc.</p> <p>Education Committee Chair volunteers to speak at workshops and panels on EE's education program</p> <p>Recommendation of other types of learning/teaching capacity with references be given to all staff</p> <p>Continue to encourage employees, especially remote employees to attend Co-op Conferences</p>		<p>Have checklists available for West Bridgewater employees to use to monitor usage</p> <p>Purchase new camcorder that has high quality sound recording and visuals</p> <p>Give internet access to employees not out of Hood River or Madison so they can download and watch videos online</p> <p>Purchase a DVD recorder/burner that is compatible with both the old VHS camcorder, VCRs, and the new camcorder</p> <p>Watch and list important previous Exchange Time videos to put on DVD and after recording to DVD, distribute to regional offices</p>	<p>and EE, and By-laws) will be translated to most needed 2nd language (Spanish, Portuguese, or Cape Verde Creole) for 2nd language employees</p>		
Inputs	<p>Pre-Survey results regional employees</p> <p>Post-survey results regional employees</p>	<p>Other co-op education, training, and participation program models</p>	<p>Catalog of digital equipment</p> <p>Inventory of what EE already has and would need</p>	<p>Inventory of Manuals – what is outdated, needs translation</p> <p>Other co-ops manuals</p>	<p>Other co-op Mentor Programs</p> <p>Outdated curriculum to update</p> <p>Old VHS videos of previous Exchange Times</p>	<p>Butcher paper orientations and graphics</p>

* W-O = Worker-Owner

(Kellogg Foundation, 2004, p. 54)

Evaluation

Summary Evaluation Table:

Outcomes	Performance Indicators	Data Gathering Method	Sources	Timeframe
Short-term Outcome #1: Educ. Comm. Is able to meet the needs of regional employees access to participation Regional employees attend co-op conferences to learn and feel connected	Post-survey showed high levels of satisfaction and a decrease in listed problems/concerns High attendance # of regional employees at co-op conferences	Survey Meetings and check-ins Conference Calls Monitoring	Regional Employees Survey Results Education Committee Members Regional employee feedback	Yearly Monthly Quarterly Yearly
Short-term Outcome #2: Regional employees are able to participate at most meetings live Regional offices are able to record and broadcast Exchange Times to West Bridgewater	Quorum is easily reached and more employees are attending and participating in meetings West Bridgewater employees watch Exchange Times made by regional offices	Check-lists Monitoring	Meeting Minutes Exchange Time Sessions	Quarterly Weekly
Short-term Outcome #3: Regional employees are able to finish their curriculum on-time Regional employees have access to resources on-site	Worker-Owner track employees are completing curriculum before their vote More employees are watching Exchange Time videos and reading books from the library than before	Curriculum Check-lists Book and Video Check-lists	Exchange Time Coordinator files	Yearly Weekly
Short-term Outcome #4: New employees	New Employees' satisfaction high	Interviews and Feedback	Regional employees	Yearly

get their manuals faster				
All regional employees are able to get updates faster	Regional employees' satisfaction high			
Short-term Outcome #5: Mentors are able to serve their buddies better Buddies feel more supported and a stronger connection to EE	Mentors' satisfaction high Buddies' satisfaction high	Post-Survey Results Monitoring/Feedback	Regional Employees Survey Results	Yearly
Short-term Outcome #6: Orientations are more visually attractive and participatory Orientation Coordinator can give orientations to remote employees through broadcast	Orientation Coordinator is satisfied Regional employees feel like they are participating more	Interviews Monitoring/Feedback	New orientation, Orientation Coordinator, regional employees	Yearly

See Appendix F for the Evaluation Plan

Sustainability Plan

Field Observation:

These observations took place at every monthly Education Committee meeting where it determined what programs and tasks had been accomplished and what still needed work. To determine which programs and tasks to focus on, it looked at its goal and input chart, and then monitored the outcomes. The effectiveness was evaluated by its monitoring programs and having monthly conference calls with remote office employees. Remote employees were asked if things were better and if they felt like they were more trained and able to participate. The effectiveness was monitored by reporting to the Worker-Owner Body every other month at the bimonthly meetings to hear feedback from the employees. The Committee felt like it was serving the mission of the organization by following the Education Committee's mission, and since Equal Exchange was a worker-owned cooperative, it followed three of the seven cooperative principles to justify its project. Also it asked the approval of the Worker-Owner body when it announced the changes in positions of the Education Committee members and appointed job duties; and when it announced its plan of action and allowed for feedback.

Sustainability Elements:

- The financial circumstances were the one largest obstacle to this project. Since the Education Committee only had a limited amount of money for the Fiscal Year 2005 (\$1,000 for technology and \$1000 for everything else) it was not able to purchase all the technology needed to meet its goals. In 2007, it purchased more equipment but still needed more money. Also because it could not purchase everything earlier in the project, it could not see the outcomes until late 2007 after this project was reported.
- The overall fear it had was that some employees might see other priorities instead of the education and training of remote folks. Our project continued to expand as new issues were brought up.
- There were not many local cooperatives near remote employees so they were not able to join other cooperatives even if they wanted to.
- Not a lot of resources and knowledge were received from other coops at the coop conferences. It seemed like most co-ops held Equal Exchange as a model and wanted to learn from Equal Exchange's experience. The Education Committee Chair spoke at one regional and one national cooperative conference about our Education Program and it seemed no other co-op was at its capacity. The Equal Exchange staff ended up giving out lots of information and recommendations to other organizations but did not receive many helpful tips for itself.
- Also time constraints were another big obstacle for the Committee. Everyone working on this project had their regular day job to do as well, and never had enough time to do both. Equal Exchange had a policy called 10% time where an employee could spend 10% of his/her regular 40 hour work week on something other than his/her main job description. Since everyone on this project had another main title besides their position with the Education Committee, only 10% maximum of their time was able to be spent on this project while at work and thus this delayed a lot of implementation and monitoring.

Institutional Plan:

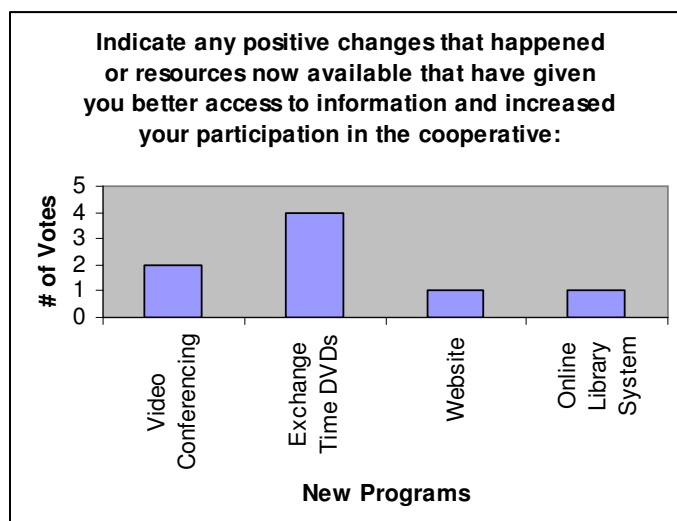
Since the Education Committee did not have enough funding in 2005, it figured out what to prioritize and asked for more money in Fiscal Year 2006 to purchase the rest of the equipment. None of the employees disagreed of the direction that it was going and felt it should prioritize those concerns and it never received negative feedback of the project during Worker-Owner meetings when the Education Committee Chair reported progress. In fact, staff loved this project and its popularity actually hurt us in the end because the Committee took on too many objectives and goals. It ended up also focusing a lot on West Bridgewater employees who were marginalized because of different work schedules, time constraints, and spoke a primary language other than English. The project moved to also focus on getting documents translated and also having interpreters at our large meetings for our Spanish and Cape Verdean Creole-speaking employees. This ended up using a lot of our budget and took away time and money from our initial project objectives and activities.

Employees were also engaged in discussions and remote staff was asked to speak about their concerns and why this project was important to them. Since there were no local cooperatives around for remote staff to join, the Committee figured out an alternative – like sending them to a cooperative conference or ordering specific books on cooperative businesses. This way they were still able to be exposed to other cooperatives and learn from them.

VI: Conclusions and Recommendations

Results

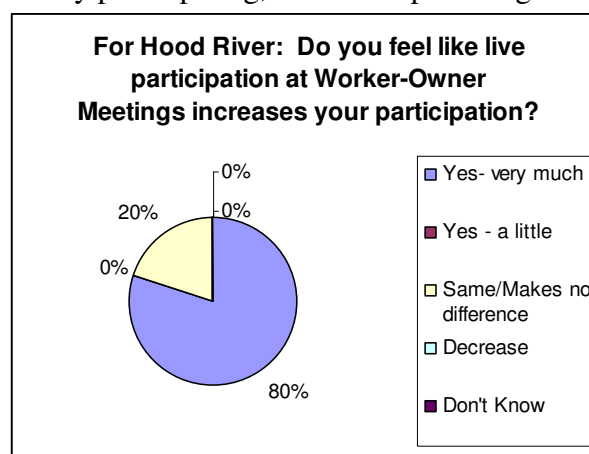
The post-survey revealed that some goals and objectives were achieved while others were not. The activities for those goals not achieved were still being implemented



and monitored after this project because of their great importance and will result to even more participation. For those activities that were implemented and monitored, the Committee found some positive outcomes. The new and improved Exchange Time videos on DVD proved to be the favorite successful objective created. That one stood out the most as a way that increased regional employees' education. The quality of the new videos on DVD because of

the new camcorder and microphone was appreciated and most everyone noticed the difference in audio and video. Video Conferencing came in second, as regional employees appreciated being able to see West Bridgewater faces and vice-versa at the meetings. They also felt like they were actually participating, a more empowering feeling than just calling-in. Almost every person who filled out the survey that had been working for Equal Exchange for more than a year felt that live participation increased their involvement. In fact, there were a few comments where people wanted live participation through video conferencing to occur more often and asked that the camera and microphone never be turned off.

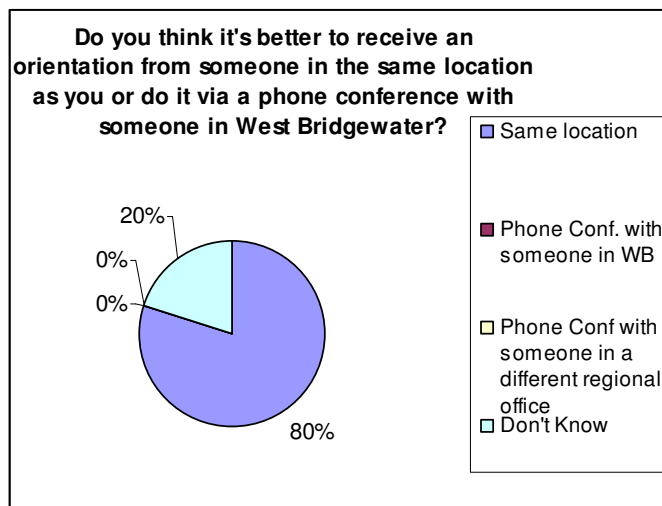
It seemed our Mentor Program changes did not have significant results nor did the book libraries. Only one person reported having actually read a book from



their new library on site in Hood River. This weak library result could have been from the fact that even though the Librarian purchased the books and made the resources available, she might have failed in communicating it enough. It seemed that a fair amount did not even know there was a library in their office so the Committee needs to work better on announcements and communication.

There was a positive result from the increase in accessibility of the Intranet and having access to download updated documents like the Personnel Policy, ByLaws, and other important information. Having these documents available online to download, speeds up communication and up-to-date information for all employees. Also even though the Orientation Coordinator worked towards making the Worker-Owner Orientations digitalized in PowerPoint and visually attractive, it was still felt that orientations should be done in-person rather than on the phone. Regardless of how attractive and participatory, almost every regional employee voiced that it needed to be done at their office or in West Bridgewater when they were visiting.

The Worker-Owner Curriculum seemed to be completed faster and on-time as opposed to before the project when regional offices did not prioritize watching the Exchange Time videos together or made time for it. With the better quality, prioritize time, and faster turn-around on the videos and live access to Worker-Owner Meetings, more remote employees were able to finish their training and education before they were voted in the cooperative. This was a huge improvement for the co-op because now employees had the educational capacity to make wise financial and structural decisions.



It also led to an increase in retention of those employees because they understood what it meant to have equity in the company and felt the empowerment of working for a co-op. At the time monitoring took place, the Committee had just implemented the Exchange Time video check-lists for regional offices; however since then, they have revealed that more people were coming to Exchange Time and watching the videos.

Nevertheless the results from the post-survey reveal that more offices are prioritizing watching the videos a few times a month, which did not occur before this project. Also an Exchange Time has been filmed and broadcasted from a regional office to West Bridgewater. It is very empowering and participating for regional employees to now also lead Exchange Times.

Recommendations

The committee realized that it was too difficult for the Education Committee Chair to do her regular job description on top of having to organize the two big co-op activity events. After this project was over, the Education Committee created another position called the Education Events Coordinator to help out with this extra task. In the

past couple of years another position has been created and that is to have a regional employee sit in on the Education Committee instead of just being part of the Worker-Owner Cabinet. This way they are part of the education and training program in all steps. The Regional Coordinator position would work on being the liaison between the Education Committee and the regional offices and remote employees. This person would make sure remote employees knew about activities that were going on – such as meetings, upcoming votes, and updated publications. Since the post-survey results revealed that there is still much more work to do to increase participation particularly in our Mentor Program, Book Library, and with live participation in Exchange Times, there is a need to focus more on making each regional office its own entity of cooperative resources. Having more videos and books on-site in Hood River, Seattle, and Madison and other future offices would create more educational accessible opportunities. Also the Mentor Program should change its policy to have a Mentor and Buddy in the same regional office and not try to connect them with a primary Mentor out of West Bridgewater. There should still be a secondary Mentor out of the West Bridgewater office but even in the most ideal situations, satisfaction is still low when Mentors and Buddies are separated and support and education systems are lost. It also seems that even though the Committee created so many programs and resources, it failed to continually communicate them to regional offices and remote employees. Reminders about what is available and ways to get involved and participate should occur at multiple times of the year so the effort is not wasted. At the end of this project the Exchange Time Coordinator realized it was still too hard to have everyone complete the curriculum on time, especially if they worked in the Production or Warehouse Department. Their schedules were very different and they couldn't leave the roaster until the task had been finished. The Committee recommends highlighting which curriculum topics are the most relevant and needed, and then prioritize 4-6 topics or categories. That way the employee gets at least the most important training their first year and can continue to strive to finish their curriculum once they become a Worker-Owner. Lastly, since the majority of regional employees voiced that orientations should be done in person, Equal Exchange needs to seriously consider increasing the Worker-Owner Budget so that either the Worker-Owner Coordinator or a member of the Education Committee (Orientation Coordinator) would have the opportunity to fly out to the regional offices and remote employee sites to train new employees. Or the committee recommended that someone in the larger regional offices like in Hood River and Madison, be trained to conduct Orientations so that new employees could receive them from that person. Though originally translation and interpretation were not part of this project, the Committee was glad to work on those issues and recommends more work to be done to make sure Equal Exchange is inclusive of their West Bridgewater Warehouse and Production employees too. *See Appendix D for the Events Coordinator job description.*



*Summer Lewis and Jessica Hiemenz of EE
attending the US Federation of Workplace
Democracy Conference in NYC*

The Education Committee Chair also created an Education Committee Timeline to help the committee stay on task according to the yearly calendar timeline. This material was created so that the Education Committee Chair would be able to step-down and have another member step-up as the new Education Committee Chair without any problems in regards to schedules.

Education Committee Yearly Timeline				
MONTH				
1st Q	January	February	March	April
	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting
	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports
	3. New Ed Comm Chair elected	3. Report to WO	3. 1:1 with all Ed Comm positions	3. Mentor Buddy Breakfast Trivia
	4. Update Curriculum	4. Calenderized Curriculum	4. Update Job Descriptions & Structure	4. Ed Comm positions filled
	5. Update Get Involved Flyer			
2nd Q	May	June	July	August
	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting
	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports
	3. "State of" Report to WO		3. Report to WO	
3rd Q	September	October	November	December
	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting	1. Ed Comm Meeting
	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports	2. Staff Meeting Reports
	3. Report to WO	3. Co-op Month Activity	3. Annual Budget Proposal	3. "End of the Year Review" Report to WO
				4. Order Top 5-10 Books for HR & Minn offices
* Note: This calender does not include regular updates to the Staff Roster, Mentors assigned, Manual supplies ordered, Manuals made, Orientations Exchange Times, WO Cabinet meetings, or other Co-op/Educational related events both internal and external				

Even though this report focuses on the implementation, monitoring, and evaluation from 2005 to 2007, the project itself continues today in 2010. Since the implementation of this project, Equal Exchange's remote employees are having better education and training programs, finishing their curriculum, checking-out library books and watching Exchange Time videos. They are participating more and their retention rate is much higher then before the project was implemented. Equal Exchange has remained a competitive business both in the fair trade industry and as a worker-owned cooperative. More regional offices are being opened and its sales increase each year. It continues to do outreach to cooperative businesses and conferences, and its educational program is seen as a model resource for other cooperatives to implement.

VII. Appendices

Appendix A: Needs Assessment (Survey Questions)

Survey on <http://www.surveymonkey.com>

1. Would you like to see accessibility to the intranet and resources available online to download like the manual, etc.?
2. Do you watch Exchange Time videos?
3. How do you feel about the current Exchange Time video system? Too slow? Not getting them, etc.?
4. Do you feel like you have adequate resources to participate in the Mentor Program as a Mentor?
5. While you were on worker-owner track or if you currently are on worker-owner track, do you feel like you have a fair game in completing worker-owner curriculum? It might be useful to ask a question about whether or not the remote staff have any idea about what the curriculum is. My experience is they really don't understand the requirements.
6. Do you feel like access to more resources (i.e.: onsite library, books, manuals, videos, etc.) would help you learn and participate more in the coop?
7. How do you feel about mentors and buddies working out of different offices? Good, bad, useful?
8. Are you interested in joining a worker-owned cooperative outside of Equal Exchange near your office to increase your participation and awareness of the worker-ownership business model?
9. Would you like to see more live participation (video-conferencing) in Exchange Time, worker-owner meetings, staff meetings, etc from regional offices/distant employees? Also would you like to do an Exchange Time where you are and then send copies of a video to other offices to watch?
10. What additional resources/changes do you feel are necessary to increase your participation and sense of belonging to the coop that wasn't already listed? Indicate the most important/pressing ones with a (*).

The results from the pre-survey indicating which items were pressing:

- Meetings/Sessions should not be at 9 am and revolved around EST, but should take place at a mutually convenient time so that all offices can participate
- The Intranet (the internal internet for the company) and resources like blogs should be accessible for all employees; Board of Directors/Worker Owner agendas/meetings/transcripts, education material, policies, by-laws, etc. should be updated and available for download to print
- Exchange Time videos (the educational videos used to train staff about various topics) are not scheduled to have a weekly showing in remote offices; so many remote employees say that they “have no time.” Many never get videos in the first place. [In West Bridgewater, Exchange Time is a weekly event that happens every Thursday from 9 – 10:30 AM and all employees were welcomed, especially worker-owner track employees. Inside and outside company presenters came each week to present a variety of topics ranging from coffee processing, delegation trips, producer profiles, departments, budgets, cooperatives, fair trade movement, etc. Since it is scheduled many West Bridgewater employees came and prioritized it. However remote staff only viewed Exchange Times by video and did not make them a priority and had no set time to watch them.]
- Exchange Time videos should be streamed on the intranet
- Mentor Program needs more training, structure, and direction. Many remote employees feel they are not qualified to be mentors because of the lack of available resources and training they received
- Remote employees are not completing their one-year education curriculum (the education requirements for new employees), yet hardly understand its importance and feel completing the curriculum is undervalued for remote folks
- Not enough resources or support to finish curriculum
- On-site resources like video and book libraries would help in regional offices (there is an on-site library in the West Bridgewater office)
- More contact/unity from West Bridgewater
- West Bridgewater should contact regional offices/individuals more often – through phone, email, Skype, etc.
- Really appreciate good written staff meetings
- Mentors and buddies from different offices only work if there is clear structure, an outline, schedules, willingness to work together, and ways for them to communicate/meet regularly. There should always be some form of a mentor onsite for additional support and training
- Remote employees do not have much interest in joining other Worker-Owner (W-O) cooperatives, EE seems to be the best fit and we should focus on that, perhaps require time for new hires to work out of the headquarters (West Bridgewater) to get a feel of the company, coop, structure before working remote
- If someone was interested in joining another W-O coop EE should support that decision
- Technology should not limit communication and EE should invest in equipment and programs that would increase participation and recording

- Really want video-conferencing and other ways for live participation such as broadcasting Exchange Time, Board of Director, and W-O meetings
- Perhaps look into ways for remote offices to create their own Exchange Time for West Bridgewater to watch, but more importantly live communication with faces
- Remote offices need monthly check-ins with mentors
- Remote folks should have priority to go on producer trips early and often (after two years of employment with EE, employees are able to go on a producer trip to visit farmers)
- Explicit budget for remote folks to visit West Bridgewater regularly
- Should Hood River, Oregon treat their office as their own coop or still look back to West Bridgewater?
- Announcements about new products and new staff for all to hear

Post Survey - Create on September 26, 2007 on www.surveymonkey.com

You or the person who previous had your position (if existed before 2005) were asked to take a similar survey back in the spring of 2005 by the Education Committee. Two and half years later we are asking you to take this survey to see if any progress has been made in regards to your access to resources, mentoring, orienting, meetings, and education that has influenced your participation in the cooperative.

1. Online and Intranet Accessibility

Do you have more accessibility to the intranet and resources available online to download like the Manual, etc.? Are you able to get Manual updates faster such as a change in Bylaws, Personnel Policy, Get Involved Flyer, updated Curriculum, etc.?

2. Exchange Time

A. Do you watch Exchange Time videos? How often and why? Do you watch more now than you did 2.5 years ago?

B. How do you feel about the current Exchange Time video system? Is the quality better than before? Too slow? Not getting them, etc.? Do you like the DVD's better? Does the microphone help?

3. Mentor Program

A. Do you feel like you have adequate resources to participate in the Mentor Program as a Mentor? If you are or were a Buddy in the past 2.5 years how is/was your experience?

B. How do you feel about mentors and buddies working out of different offices? Good, bad, useful?

4. Curriculum

While you were on worker-owner track or if you currently are on worker-owner track, do you feel like you have a fair game in completing worker-owner curriculum?

5. Access to Resources: On-site book and video libraries

A. Do you feel like access to more resources (i.e.: onsite library, books, manuals, videos, etc.) would help you learn and participate more in the coop?

B. If you already have an on-site book and video library has it increased your participation? For Hood River: Have you used/read any of the books purchased for your book library last December?

6. Worker-Owner Orientations

A. If you attended a Worker-Owner Orientation in the past 2.5 years what did you think of it? Did you have all the visuals (pictures, PowerPoint, graphs, etc.) sent to you in time for the Orientation?

B. Do you think it's better to receive an orientation from someone in the same location as you or do it via a phone conference with someone in West Bridgewater?

7. External Cooperative Experience

Are you interested in joining a worker-owned cooperative outside of Equal Exchange near your office to increase your participation and awareness of the worker-ownership business model?

8. Live Participation

Would you like to see more live participation (video-conferencing) in Exchange Time, Worker-Owner Meetings, staff meetings, etc from regional offices/employees? Also would you like to do an Exchange Time at your location and then send copies of a video or project it live for other offices to watch? For Hood River: Do you feel like live participation at Worker-Owner Meetings increases your participation?

9. Indicate any positive changes that happened or resources now available that have given you better access to information and increased your participation in the cooperative? Indicate the most important/significant with a (*).

10. What additional resources/changes do you feel are necessary to increase your participation and sense of belonging to the coop that wasn't already listed? Indicate the most important/pressing ones with a (*).

Appendix B: 7 Principles of Cooperatives:

- Volunteer and Open Membership
- Democratic Member Control
- Member Economic Participation
- Autonomy and Independence
- Education, Training, and Information
- Co-operation among Cooperatives
- Concern of Community

Appendix C: Governance Matrix and EE Organizational Chart

Governance Matrix

Decision	Decision maker	Vote required	By-law page
new w/o member	w/o	2/3 of membership	3
petition to be a non-w/o employee	w/o	2/3 of membership	3
specify purpose of annual meeting	president	-	12
"	BOD	?	12
"	w/o	20%	12
call a special w/o meeting	president	-	12
"	BOD	?	12
"	w/o	20% in writing	12
hold a w/o meeting (quorum)	w/o	60%	12
take an action/decision	w/o	2/3 of members present	13
take an action/decision by written consent	w/o	100% in writing	13
elect board members	w/o	50%	13 ****
fill a BOD vacancy	w/o	50%	14
"	BOD	50%	14
remove a BOD director	w/o	2/3	14
"	BOD	2/3	14
call a special BOD meeting	BOD	3 or more	14
hold a BOD meeting (quorum)	BOD	51%	14
take an action/decision	BOD	2/3 of BOD present	14
take an action/decision by written consent	BOD	100%	15
amend by-laws	BOD	2/3	17 (a)
"	w/o	2/3 of members present	17 (b)
(a) Exceptions exist, e.g., when an action is required by w/o.			
(b) The w/o meeting notice must indicate that change in by-laws was to be considered.			

Appendix D: Staff Job Descriptions

Worker-Owner Coordinator

Equal Exchange

Worker-Owner of Equal Exchange with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Worker-Owner Body

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 2-3 hours a week be focused on the W-O Coordinator position

General Description/Specific Job Duties: Accountable for the growth and development of worker-owners as a group. Keep worker-owners informed of issues for consideration and matters of concern in the workplace. Create the space for communication and dialogue among worker-owners. Develop skills in facilitation, group decision-making, problem-solving, and conflict resolution. Facilitate or provide for the facilitation of meetings. Keep worker-owners informed of upcoming worker-owner meetings at least 2 weeks in advance of the meeting and include the proposed agenda. Keep or provide for the keeping of accurate records of worker-owner meetings and decisions. Ensure that decisions made by worker-owner body are carried out. Have an active role on the Education Committee.

Qualifications: Leader, able to communicate and clarify responsibilities and roles of worker-owners. Candidate is able to balance W-O Coordinator with regular salary position and able to manage time well and feel confident speaking in front of large groups.

Education Committee Chair

Equal Exchange

Worker-Owner of Equal Exchange with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Worker-Owner Body and Worker-Owner Coordinator

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 2-3 hours a week be focused on the Education Committee Chair position

General Description/Specific Job Duties: Oversees the Education Committee, spends 2-3 hours a week on related tasks, setting agendas, scheduling meetings, gives a 10-15 minute report to the Worker-Owner body at every bimonthly meeting; oversees the Mentor Program, new worker orientations, video and book libraries, Exchange Time, Education Curriculum, and Worker-Owner Manuals. Serves as a liaison between the worker-owner education and the W-O Body as well as works directly with the Worker-Owner Coordinator on the annual W-O budget.

Mission: “The Education Committee of the Board exists to advance Equal Exchange’s Mission and Guiding Principles through staff education. It aims to develop competent and engaged worker-owners through the worker-owner curriculum and provide a dedicated space for continuous learning. Our tasks have included: coordinating exchange times; maintaining a useful and accessible worker-owner curriculum; providing input about staff retreats; assigning mentors to new staff on worker-owner track; creating was for non-Canton employees on worker-owner track to complete worker-owner trainings, reviewing and updating Worker-Owner manual.”

Qualifications: Good leadership skills, good communication with the ability to speak in public and answer questions, able to take on multiple tasks, time management skills with the ability to balance normal departmental workload with Education Committee requirements, able to serve as a liaison and report back to worker-owners, capable of assigning new buddies to mentors, able to fill in the gaps if other committee members cannot, and is dedicated to the model of worker-ownership.

Exchange Time Coordinator

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 1-2 hours a week be focused on the Exchange Time Coordinator position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, schedules weekly Exchange Time presentations, reimburses guest speakers for their travel, oversees the recording of Exchange Time, makes sure all Exchange Times are copied to DVDs and sent to distant office employees, facilitates the video library program for Madison and Hood River.

Qualifications: able to work directly and report back to the Education Committee, time management skills with the ability to balance normal departmental workload with Exchange Time requirements, able to fill in the gaps if needed, well organized with long-term vision of Exchange Time scheduling.

Orientation Coordinator

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job descriptions with note that 1-2 hours a week be focused on the Orientation Coordinator position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, types up or oversees the typing up of all new worker orientations from butcher paper, does or oversees that all orientations go into PowerPoint and works directly with the Marketing Department to put PowerPoint online so that they are available for download.

Qualifications: able to work directly and report back to the Education Committee, time management skills with the ability to balance normal departmental workload with Orientation Coordinator requirements, able to fill in the gaps if needed, well organized and dedicated to membership education and resources.

Mentor Program Coordinator

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 1-2 hours a week be focused on the Mentor Program Coordinator position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, facilitates with the Education Committee Chair the assigning of new buddies and mentors, works directly with the Education Committee on the Mentor Program annual gathering and takes on majority of responsibility and tasks delegation, oversees the education curriculum, sends quarterly emails out to mentors and buddies reminding them to meet and walk through the Worker-Owner Manuals, works directly with mentors and buddies from different offices and explores ways for them to communicate and work together, and reports back to Education Committee on status of mentors and buddies.

Qualifications: able to work directly and report back to the Education Committee, time management skills with the ability to balance normal departmental workload with Mentor Program Coordinator requirements, able to fill in the gaps if needed, well organized and dedicated to membership education and resources.

Worker-Manual Coordinator

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 1-2 hours a week be focused on the Worker-Manual position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, works directly with departments, other committees and governing bodies in making sure sections of the W-O manuals are updated frequently, works directly with the Marketing Department in making sure all sections of the W-O Manual are put online and available for download, makes sure all new employees receive their W-O Manuals within the first two days of their job, coordinates any needed copying or outsourcing to make W-O Manuals.

Qualifications: able to work directly and report back to the Education Committee, time management skills with the ability to balance normal departmental workload with Worker-Manual Coordinator requirements, able to fill in the gaps if needed, well organized and dedicated to membership education and resources.

Librarian

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 1-2 hours a week be focused on the Librarian position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, gives or oversees the *Bookspot* and trivia question at each staff meeting, is the lead responsible contact for the West Bridgewater library and oversees borrowing of books, facilitates the book library program of Madison and Hood River.

Qualifications: able to work directly and report back to the Education Committee, time management skills with the ability to balance normal departmental workload with Librarian requirements, able to fill in the gaps if needed, well organized and dedicated to membership education and resources.

Education Events Coordinator

Equal Exchange

Worker-Owner or Worker-Owner on track with part of their 10% Time dedicated to the W-O Body

Direct Supervisor: Education Committee Chair

Travel: n/a

Salary: Salary is through their normal departmental job description with note that 1-2 hours a week be focused on the Exchange Time Coordinator position.

General Description/Specific Job Duties: Attends monthly Education Committee meetings, reports back to the Education Committee Chair, coordinates the Co-op Month Activity every October by creating or overseeing the creation of activities, organizing food, prizes, and setup/clean up crew, and supports the Mentor Coordinator for the annual Mentor Buddy Breakfast Trivia each spring, coordinates all other education related events beyond Exchange Time, retreats, and/or training sessions, supports the Exchange Time Coordinator if needed for special/different Exchange Times, and works to increase education related events for regional offices and staff.

Qualifications: able to work directly and report back to the Education Committee, able to work on a team, time management skills with the ability to balance normal departmental workload with Event requirements, able to fill in the gaps if needed, well organized, creative, and able to brainstorm fun large group activities.

Appendix E: Program Budgets

EDUCATION AND PARTICIPATION FOR ALL EE EMPLOYEES			
	COSTS		TIME
Available W-O Budget		\$3,000	2005 Fiscal Year
Available \$ For Technology		\$1,000	2005 Fiscal Year
Available \$ For Voting Software		\$600	2005 Fiscal Year
Available \$ For Conference Calls		\$1,000	2005 Fiscal Year
Available \$ For Other		\$400	2005 Fiscal Year
Salary			
W-O Coordinator	1 hour/week x hourly wage		April -June 2005
Education Comm. Chair	2-3 hrs/week x hourly wage		April 2005 + forever
Education Comm. Members	1-2 hr/week x hourly wage		April 2005 + forever
Equipment			
Camcorder		\$900	1 time purchase
		(\$600)	Marketing Purchase
VHS Tapes (Total Purchases)		\$100	
Stereo Equipment		\$0	Donated
Projector Screen		\$0	Marketing Purchase
DVD players (1)		\$0	Donated
DVD recorder/burner		\$251	1 time purchase
Blank DVDs		\$0	Marketing Donated
Books		\$200	1 time purchase/year
Software for Livebroadcasting		\$ n/a	1 time purchase
CD Layout Inserts		\$62	
Total Equipment Expense		<u>\$913</u>	
Postage			
Mailing DVDs		\$ n/a	weekly/office expense
Communication			
Conference Calls		\$100	Each year
Speaker Honorarium		\$100	
Total Communication Expense		<u>\$200</u>	
Event/Socials			
Food		\$100	
Supplies		\$0	Marketing Donated
Other			
Worker-Owner Manuals		\$200	1 time purchase/year
Total 2005 Budget Allocation		\$1,413	

EDUCATION AND PARTICIPATION FOR ALL EE EMPLOYEES

COSTS		TIME
Available W-O Budget	\$4,000	2006 Fiscal Year
Available \$ For Technology	\$1,000	2006 Fiscal Year
Available \$ For Conference Calls	\$1,000	2006 Fiscal Year
Available \$ For Other	\$400	2006 Fiscal Year
Salary		
W-O Coordinator	1 hour/week x hourly wage	April 2005 + forever
Education Comm. Chair	2-3 hrs/week x hourly wage	April 2005 + forever
Education Comm. Members	1-2 hr/week x hourly wage	April 2005 + forever
Equipment		
DVD players (2)	\$120	1 time purchase x 2
Blank DVDs	\$200	1 time purchase
Books	\$200	1 time purchase/year
Outsourcing for DVD's	\$0	1 time purchase/year
Software for Livebroadcasting	\$100	1 time purchase
Library Shelves	\$180	1 time purchase
Total Equipment Expense	<u>\$800</u>	
Postage		
Mailing DVDs	\$ n/a	weekly/office expense
Communication		
Conference Calls	<div style="border: 1px solid black; display: inline-block; width: 150px; height: 15px; vertical-align: middle;"></div> \$100	Each year
Conferences/Outside training	\$100	
Speaker Honorarium	\$300	
Total Communication Expense	<u>\$500</u>	
Event/Socials		
Food	\$100	
Supplies	\$0	Marketing Donated
Other		
Worker-Owner Manuals	\$200	1 time purchase/year
2006 Worker-Owner Budget	\$4,000	
2006 Educ Com Bud (Project)	\$2,300	
Total Allocated (Presently)	<u>\$1,600</u>	

Appendix F: Evaluation Plan

EVALUATION PLAN

Purpose of Evaluation?

☐ To prove that the more educated and trained our employees are, the better they are able to market and understand our products

☐ To verify that worker-owner track curriculum is completed when resources are available

☐ To prove that education capacity and access to resources are determining factors in employee participation

☐ To show that worker-owned cooperatives are a viable model of business and can compete by having well trained and education employees

☐ To show that worker-owners want to participate if they could

☐ Exchange Time videos will be watched if employees have on-site access to them

☐ Quorum at meetings will easily be met, and participation at meetings will increase due to more knowledgeable and unified employees

☐ Verify that the Education Committee is meeting the needs of the regional offices and remote employees

☐ To assess the unity of employees

☐ Public Relations

Audience(s) for the Evaluation?

☐ Worker-Owner Body of Equal Exchange

☐ Remote employees

☐ Other cooperatives

☐ Cooperative institutes and associations

☐ Customers/General public

What Kinds of Information Are Needed?

- ☐ The process of the service delivery (inputs, activities, and outputs)
- ☐ Benefits to customers/general public (outcomes)
- ☐ Number of current participants at general meetings and sessions
- ☐ Assessment of education and training to remote offices
- ☐ Assessment of unity and participation among Worker-Owner Body
- ☐ Mentor Program experience

Type of Evaluation?

- ☐ Goal-based (results like # of participants, etc.)
- ☐ Service (Outcome)-based
- ☐ Process-based
- ☐ Assessment-based (survey to measure satisfaction levels)

Where Should Information Be Collected From?

- ☐ Remote staff
- ☐ Worker-Owner Body
- ☐ Check-lists from video and book libraries in remote offices
- ☐ Meeting/Session notes that record quorum numbers
- ☐ New buddies and mentors

How Can Information Be Collected in Reasonable and Realistic Fashion?

- ☐ Post-Survey
- ☐ Interviews/Conference Calls
- ☐ Feedback at meetings
- ☐ Check-lists from libraries (Documentation)
- ☐ Curriculum Check-lists (Documentation)

___ Observing Worker-Owners at meetings

When is the Information Needed?

All of the information is needed for a written-up evaluation due in May 2006. The monitoring will start to take place in February 2006 and will continue, after the programs have been implemented.

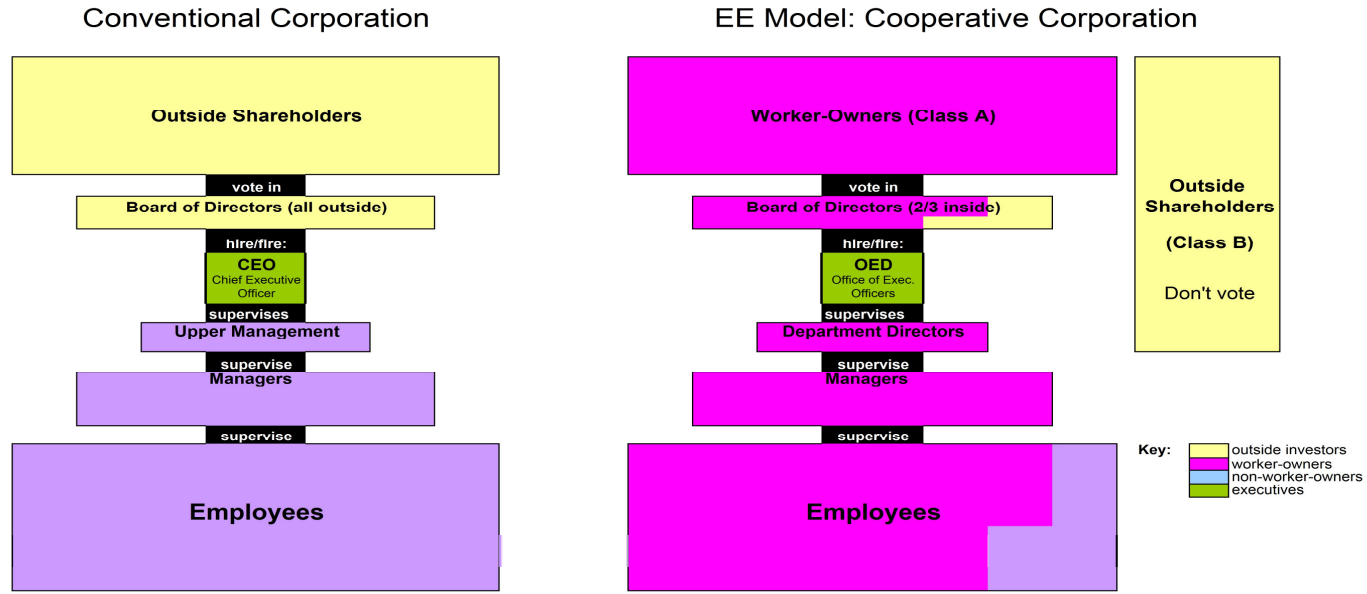
Resources Are Available to Collect the Information?

No resources are available as of yet to collect the information, but will be made/distributed once the project is implemented. The survey will be used in April of 2006 and the library check-lists will be distributed in January 2006.

How to Analyze the Information?

We will be using a lot of qualitative analysis, since most of our monitoring will be an assessment of satisfaction and level of participation. However we do have some statistical measures such as # of employees attending meetings (is quorum reached?), # of worker-owners on track completing their curriculum, and # of videos and books checked out in the libraries. Both the surveys will have some statistical measures, but over all it will be analyzed through qualitative measures.

Appendix G: Conventional Corporation Structure v. EE Model: Cooperative Corporation



Appendix H: The Education Committee Appointment Policy

The Education Committee of Equal Exchange

Chair and Membership-Position Appointment Policy

Voted on by Education Committee on

Mission: The Education Committee of the Worker-Owner body exists to advance Equal Exchange's Mission and Guiding Principles through staff education. It aims to develop competent and engaged worker-owners through the worker-owner curriculum and provide a dedicated space for continuous learning. Our tasks have included: coordinating exchange times; maintaining a useful and accessible worker-owner curriculum; providing input about staff retreats; assigning mentors to new staff on worker-owner track; creating ways for non-West Bridgewater employees on worker-owner track to complete worker-owner trainings; reviewing and updating the Worker-Owner manual

Reason for Policy: This policy was created to formalize the appointment of both the Education Committee Chair and also the positions of the Education Committee. By having a formal policy, this will give members timelines for expected commitment of one year, allow room for new leadership opportunities by having an annual appointment time and room for those members who want to step down after a year.

This policy was approved by the Education Committee Chair, Education Committee Members, and the Worker-Owner Coordinator of 2006.

Education Committee Chair Appointment

Qualifications: Must be a worker-owner by the February of the following year.
Also see job description.

Timeline:

November Worker-Owner Meeting: Education Committee Chair announces to all staff that the Chair position will be open and appointed in January. Those interested should see both the Education Committee Chair and the Worker-Owner Coordinator.

Before December Meeting: Worker-Owner Coordinator meets with Education Committee Chair to discuss renewal of position or stepping down

December Education Committee Meeting: Worker-Owner Coordinator presents Education Committee Chair to Committee OR states that a new Chair is needed and this opens the process for a new appointment
January meeting: Candidate(s) for Chair are presented to the Education Committee and 1 candidate will be voted to serve year long term (starting in January)

If there is a run-off (meaning more than 1 candidate applies) then all candidates will give a statement to the Education Committee and Education. Comm. members will discuss candidates after hearing their presentations, and make a formal decision base on a majority vote.

February Worker-Owner Meeting: Worker-Owner Coordinator announces new Education Committee Chair to Worker-Owner body and the new chair gives their first report of that year.

Education Committee Position Appoints

Qualifications: Must be a worker-owner or worker-owner track employee.
Also see job description:

This is for the Exchange Time Coordinator, Librarian, Mentor Program Coordinator, and Orientation Coordinator.

Timeline:

February Education Committee Meeting: Education Committee Chair announces that one-year positions will be up in May and asked interested parties to consider taking or renewing the positions.

Month of March: Education Committee Chair meets with Education Committee members 1:1 who hold formal Education Committee positions to discuss renewal of position or stepping down. Also job descriptions will be discussed as well to determine if updates/changes are needed to reflect reality of job.

March 30th: Chair sends notification to Education Committee and entire EE staff that positions are open and we need them fulfilled by May Worker-Owner Meeting.

April Meeting: Education Committee discusses positions and those interested in renewing and/or taking on the position, and agrees (majority vote if needed) on candidates based upon Education Committee Chair's recommendation.

May Worker-Owner Meeting: Position appointments are announced and introduced to all staff along with updated (if needed) job descriptions of all positions.

Appendix I: Worker Owner Curriculum Check-list

Worker Owner Curriculum Checklist

Updated: 3/07



Name: _____
Department: _____
Position: _____
Date Hired: _____
Mentor: _____

This curriculum is designed to give prospective and current worker-owners the background and tools they need to be effective members of Equal Exchange, a worker-owned co-operative and Fair Trade organization. Because of our company's unique structure and mission, a broad range of information is included. This curriculum is to be used solely as a guide, however, it is strongly recommended that in your first year as a worker-owner track employee you participate in at least one Exchange Time from each of the eight categories below; observe one board meeting and two worker-owner meetings; participate in mentor-buddy activities; and read your worker-owner manual. Worker-owners are encouraged to fulfill this curriculum to continue to develop their skills and understanding in these areas as owners of Equal Exchange.

<u>COFFEE</u>	<u>DATE COMPLETED</u>
The Coffee Trade & Fair Trade Standards	_____
Coffee Producers: Central & South America	_____
Coffee Producers: Africa & Asia	_____
Quality/Cupping/Processing	_____
Reading: Chapter 3 of <i>The Coffee Book</i>	_____
 <u>TEA</u>	
The Tea Trade & Fair Trade Standards	_____
Tea Producers: Africa	_____
Tea Producers: Asia	_____
Quality/Processing	_____
Reading:	_____
 <u>CHOCOLATE/COCOA/SUGAR</u>	
The Cocoa Trade & Fair Trade Standards	_____
Cacao Producers: Dominican Republic & Peru	_____
Sugar Producers: Paraguay & Costa Rica	_____
Quality/Processing	_____
Reading: http://www.globalexchange.org/campaigns/fairtrade/cocoa/background.html	_____
 <u>DOMESTIC FAIR TRADE</u>	
Domestic Fair Trade Overview & Standards	_____
DFT Producers & Partners	_____
Quality/Processing	_____
Reading: http://www.equalexchange.com/dft/dftprinciplesflyer.pdf	_____

Worker Owner Curriculum Checklist – Cont.

FAIR TRADE

DATE COMPLETED

History of the Fair Trade Movement

Economics of Globalization

Delegation Reports

Critiques of Fair Trade

Video: *The People Behind Your Everyday Cup*

Reading: “History” and “FT Major Players” Sections of *The Conscious Consumer*

EQUAL EXCHANGE & WORKER OWNERSHIP

The History of Equal Exchange

Role of the Board

By-laws, Articles, and Policies

EE’s Governance Matrix

EE Structures – How to Get Involved

Democratic Participation

Additional Readings: Introduction to *Small Group Democracy*,
Introduction to *When Democracy Works*, Section 3 of EE Owner’s
Manual, the By-laws and Personnel Policy

COOPS & OTHER ECONOMIC MODELS

Business Organizations

History of the Co-operative Movement

Types of Co-ops & the Mondragon Model

Video: *Democracy in the Workplace*

Reading: Section 5 of EE Owner’s Manual

FINANCIAL TRAINING*

EE’s Capital Structure

Financial Statements

Measures of Success

OTHER ACTIVITIES:

- Observe 1 Board Meeting
- Observe 2 Worker-Owner Meetings
- Participate in Mentor-Buddy breakfast
- Participate in Mentor-Buddy co-op month activity

Committee work is strongly encouraged after a 6 month time period at Equal Exchange. See supervisor and committee chair for approval on participation in a given committee before attending.

* * * * *

***Note:** The Financial Training Exchange Times will be updated as needed pending the results of the work of the ad hoc Financial Training Team.

Appendix J: USFEDCOOP Presentation and the ECWD PowerPoint Presentation

Unless the principles of Co-operative economics are well understood by every member, the Cooperative will ultimately collapse, although outside pressure may hold it together for awhile. Accordingly, the Cooperative movement must begin with a thorough-going educational movement.

Toyohiko Kagawa, *Brotherhood Economics*



Managing Generational Turnover

Handouts courtesy of Jessica Hiemenz, Education Committee Chair,
Equal Exchange Cooperative

Presented at the National Worker Cooperative Conference
October 14, 2006
New York City

Mission: The Education Committee of the Worker-Owner body exists to advance Equal Exchange's Mission and Guiding Principles through staff education. It aims to develop competent and engaged worker-owners through the worker-owner curriculum and provide a dedicated space for continuous learning. Our tasks have included: coordinating exchange times; maintaining a useful and accessible worker-owner curriculum; providing input about staff retreats; assigning mentors to new staff on worker-owner track; creating ways for non-West Bridgewater employees on worker-owner track to complete worker-owner trainings; reviewing and updating the Worker-Owner manual



- Worker-Owner Budget
- Structure of the Education Committee
- Education Committee Job Descriptions
- Worker Owner Curriculum Check-list
- Participation Cycle
- Governance Matrix
- Challenges

How We Work Here!



By Jessica Hiemenz,
Education Committee Chair
July 20, 2007



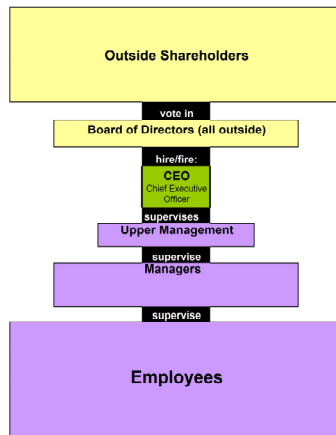
History of EE cooperative

- 1986 Equal Exchange founded
- 1990 Adoption of formalized worker-owner cooperative structure
- 1997 Creation of Worker-Owner Coordinator position
- 2002 Education Committee becomes committee of the Worker-Owner body (was a Board committee)
- 2005 Creation of worker-owner cabinet to share responsibilities; electronic voting for membership
- 2007 Currently there are 71 worker-owners, and a total of 99 worker-owners and worker-owners on track

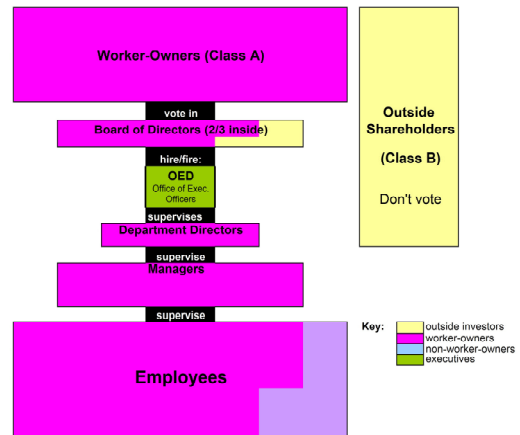
Who owns Equal Exchange?

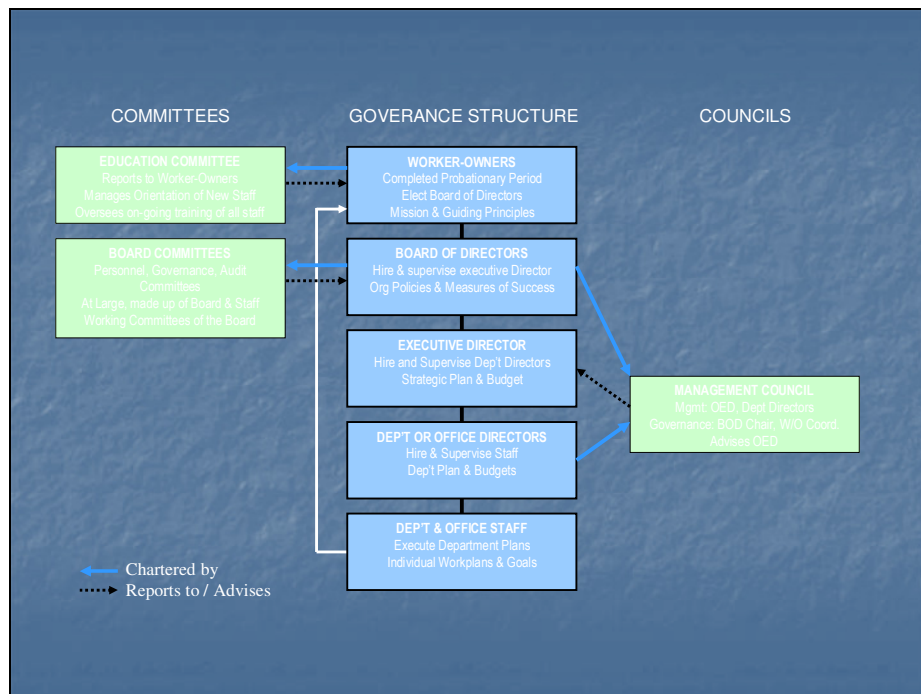
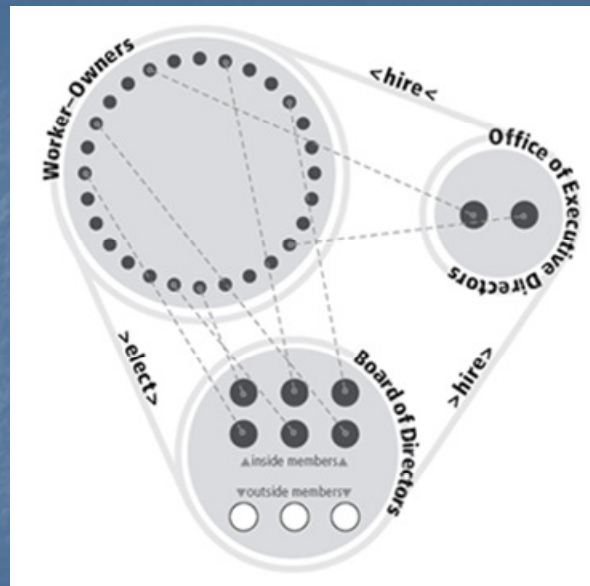


Conventional Corporation



EE Model: Cooperative Corporation





Decision	Decision maker	Vote required	By-law page
new w/o member	w/o	2/3 of membership	3
petition to be a non-w/o employee	w/o	2/3 of membership	3
specify purpose of annual meeting	president	-	12
"	BOD	?	12
"	w/o	20%	12
call a special w/o meeting	president	-	12
"	BOD	?	12
"	w/o	20% in writing	12
hold a w/o meeting (quorum)	w/o	60%	12
take an action/decision	w/o	2/3 of members present	13
take an action/decision by written consent	w/o	100% in writing	13
elect board members	w/o	50%	13
fill a BOD vacancy	w/o	50%	14
"	BOD	50%	14
remove a BOD director	w/o	2/3	14
"	BOD	2/3	14
call a special BOD meeting	BOD	3 or more	14
hold a BOD meeting (quorum)	BOD	51%	14
take an action/decision	BOD	2/3 of BOD present	14
take an action/decision by written consent	BOD	100%	15
amend by-laws	BOD	2/3	17
"	w/o	2/3 of members present	17

(a) Exceptions exist, e.g., when an action is required by w/o.

(b) The w/o meeting notice must indicate that change in by-laws was to be considered.



Worker-Owner Body

The worker-owner body has decision-making powers:

- Vote in members
- Elect board, comprise 2/3 of seats
- Elect worker-owner coordinator, Appoint Education Committee Chair
- Power to change by-laws, articles of incorporation
- Approve change of location, adding of new service or operation
- Provide input for other items:
 - Compensation philosophy
 - 20 year vision
 - Salary ratio
 - Hiring of executive directors



Recent worker-owner body actions

- Changed mission statement
- Changed calculation of patronage dividends
- Changed Board election policies for vacant outside seats
- Introduced worker-owner cabinet and posts
- Voted to ratify 20-year vision (developed by Board)
- Narrowly voted down Social Council proposal



Requirements for becoming a work-owner

- 1) support the company through full-time work
- 2) approved by 2/3 of membership
- 3) completed 12 month trial period
- 4) completed first year review
- 5) made arrangements to pay membership fee

- engaged in the cooperative and made efforts to complete worker-owner curriculum within 1-2 years
- good owners



Economic Involvement at EE

- Members buy Class A (voting rights) share; current value \$2,950
- Share can be paid off over 4 years
- Worker-owners share in risk and rewards of ownership
- One person = one vote = one patronage share
- No incentive to keep members out

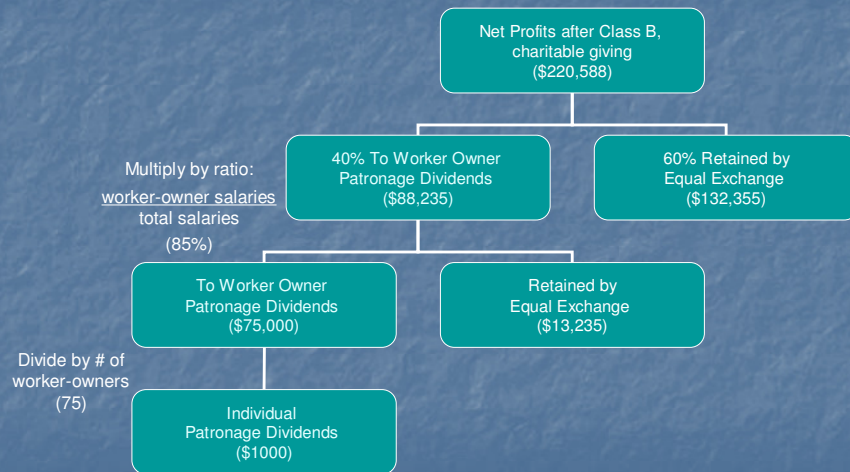


Patronage Dividends/Losses

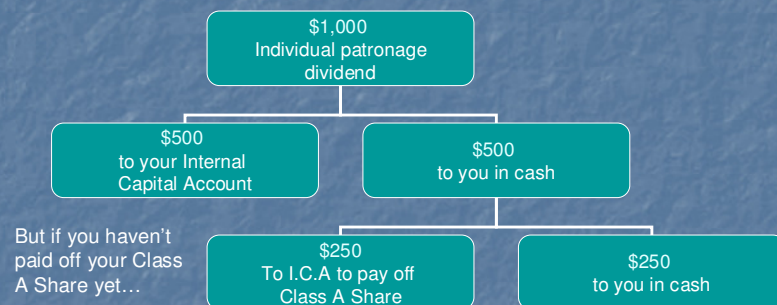
Sequence at year's end:

- Determine company's net profits
- Pay out Class B shareholder dividends
- Charitable giving
- Pay Patronage Dividends/Losses
- Pay corporate taxes

Calculating Patronage: example



How your dividend gets to you



Note: In loss years, your share of the loss is taken out of your internal capital account



How to get involved

- Education committee
 - Library, mentor coordinator, exchange time coordinator, etc.
- Personnel Committee
- Worker-owner cabinet
- Eco Committee
- Staff Meeting facilitation (West Bridgewater only)
- Kitchen cabinet (West Bridgewater only)
- Hockamock co-op (West Bridgewater only)
- Brew crew (West Bridgewater only)
- Other committees possible as openings arise:
 - Audit Committee
 - Governance Committee
 - Charitable Giving committee

Principle #5: Education & Training

- Mentor-Buddy program
- Owner manual
- Exchange Times and coop activities
- Library
- Worker-Owner Orientation
- Training budget
- Worker-owner meetings, Board meetings
- Producer Delegations
- Conferences
- 10% time involvement

2007 Worker Owner Budget GL: 84775		
Education Committee		
WO Manuals		\$200.00
Exchange Time Supplies		\$200.00
Speakers		\$300.00
Mentor Program		\$200.00
Translation		\$1,200.00
Publications and Supplies		\$150
Library		\$100.00
	* Publications and Books different GL	
Total		<u>\$2,350.00</u>
Worker-Owner		
Conference Calling		\$600.00
Travel		\$200.00
Outreach		\$800
	2008 Eastern Conference for Workplace Democracy	
Total		<u>\$1,600.00</u>
Total		<u>\$3,950.00</u>
Allocated		\$4,000.00
Buffer/Extra		\$50.00

Education Committee

- Chair – oversees all Education Committee responsibilities and positions, attends Worker-Owner Cabinet Meetings and reports to the Worker-Owners
- Exchange Time Coordinator
- Mentor Program Coordinator
- Orientation Coordinator
- Worker-Owner Manual Coordinator
- Librarian and Library Group

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