Co-operative Councils
Innovation Network

Cooperative Councils' Innovation Network

November 2022

Growing an Inclusive Cooperative Economy

Contents

Cooperative values

Work undertaken by the CCIN and its members seeks to reflect, uphold and strengthen the agreed cooperative values and principles.

Social Partnership	Democratic Engagement	Co-production	Enterprise and social economy
Maximising social value	Community leadership and a new role for councillors	New models of meeting priority needs	Innovation

About CCIN

The Cooperative Councils' Innovation Network is a collaboration between local authorities who are driving global public policy development and best practice with a common belief in Cooperative Values and Principles.

We want to reclaim the traditions of community action, community engagement and civic empowerment which can transform communities, and which will help us deliver radical and innovative programmes that are designed, led, and delivered in partnership with communities and other sector partners, maximising the social dividend they bring.

It has always been the purpose of the Network to share our developing good practice and to support one another in our cooperative aims and values. Established in 2016, the Policy Lab programme is an opportunity for any CCIN Member to present an idea and receive funding for collaboration with other members, to support cooperative solutions to the challenges facing local government.

The Network is open to all UK councils, regardless of political affiliation, who can demonstrate innovation and a willingness to drive forward the Cooperative Councils' agenda.

For more information, see www.councils.coop
To find out more about joining the CCIN contact:
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As Chair of the Cooperative Councils' Innovation Network, I welcome the publication of this report and its contribution to learning and tools to help grow inclusive, cooperative economies.

This Policy Lab demonstrates transferable learning, relevant more generally, by those involved in developing inclusive economy and community wealth building approaches to further the growth of cooperatives and democratically owned businesses.

I wish to thank colleagues from across the Network for their contributions to this report, especially the case studies and tools from which we can all learn so much.

Councillor Sharon Taylor OBE,
Leader of Stevenage Borough Council and Chair of the Cooperative Councils' Innovation Network

Acknowledgements

Foreword

As Leader of Oxford City Council and portfolio holder for economic development I welcome the publication of this report summarising learning, case studies and tools from the 'Growing an Inclusive Cooperative Economy' Policy Lab project.

Oxford City Council's role to lead the Policy Lab in partnership with CCIN Associate Members from Stevenage Borough Council, Torbay Council, Preston City Council and Affiliate Member The Development Co-operative, provides additional learning and case studies in support of Oxford City Council's wider inclusive economy work. It also places it in a wider national context with transferable learning for the development of cooperative and democratic forms of economic development.

The toolkit should provide useful resources and case studies to draw on, with learning directly relevant to other councils and CCIN members working on the areas of community mapping, social value and procurement, social enterprise approaches in social care and social inclusion. The learning is also relevant more generally to those developing inclusive economy and community wealth building approaches to further the growth of cooperatives and democratically owned business.

I wish to thank Oxford City Council officers, partners and the participating councils from across the Network for their contributions to this report,

**Councillor Susan Brown,
Leader and Cabinet Member for
Inclusive Economy and Partnerships**

Introduction

This is a national Policy Lab project in partnership with CCIN Associate Members from Stevenage Borough Council, Torbay Council, Preston City Council and affiliate member The Development Co-operative. The 'Growing an Inclusive Cooperative Economy' Policy Lab established a steering group, meeting regularly and co-operating to share best practice and case studies on how to support the growth of the cooperative economy.

The steering group led by Oxford City Council delivered a test and learn pilot on cooperative mapping, looking at creating a directory of cooperatives in the city's areas of deprivation. To promote co-op growth, this directory can be shared with large anchor institutions' procurement teams to prioritise when choosing suppliers to generate local, social value. After a directory was drafted, it was later developed as part of two wider initiatives – Oxfordshire Inclusive Economy Partnership and Owned by Oxford – to become an initiative mapping community assets (see Oxford Case Study).

Torbay Council and Stevenage Borough Council were also both steering group members and delivered test and learn pilots in Torbay, focusing on care cooperative development, and in Stevenage, on social inclusion (see Torbay and Stevenage Case Studies).

Preston City Council and The Development Co-operative were both steering group members fulfilling an advisory role to the steering group and helping to co-produce the test and learn pilots and collate learning and case studies.

Approaches included promoting community wealth building and inclusive economy initiatives with a focus on embedding social value in procurement across anchor organisations; community mapping; financial support; advice and awareness-raising.

Growing an Inclusive Cooperative Economy Policy Lab

Following the approval of the Policy Lab proposal for 'Growing an Inclusive Cooperative Economy' led by Oxford City Council, a project plan was agreed to guide the development of the work, between March 2021-March 2022.

Key Deliverables/Phases
The below CCIN members committed to participate in the project. It was expected that all participating organisations carry out the delivery of the project in three phases over the period March 2021-March 2022:

- **Phase 1:** Research – Contribute case studies and content to develop the toolkit and report
- **Phase 2:** Test/Learn Delivery – Undertake a test-learn pilot (Oxford, Torbay and Stevenage)
- **Phase 3:** Report/Toolkit – Contribute to and participate in the workshops; and, contribute to the report/toolkit produced at the end of the Policy Lab project.

Participant Organisations
The participating organisations formed the steering group including at least one affiliate member, deputising when not available to attend.

Member	Steering Group Member	Role in Steering Group
Councils		
Oxford City Council	Clayton Lavallin	Policy Lab project lead, chair Lead for test-learn pilot (Oxford) and Inclusive economy partnership
Oxford City Council	Cllr Richard Howlett	Co-operatives Champion (Oxford)-initial role
Oxford City Council	Carmel Conway	CCIN Representative (Oxford)
Oxford City Council	Simon Grove-White	Lead for Community Wealth Building Project (Oxford)
Torbay Council (TDA)	Daniel Newman	SG Member for Torbay lead for test-learn pilot (Torbay)
Preston Council	Cllr Matthew Brown	SG Member for Preston Advisory Role
Stevenage Council	Mena Caldbeck	SG Member for Stevenage lead for test-learn pilot (Stevenage)
Affiliate Member		
Development Cooperative	Martin Strube	Project Training lead Advisory Role

Main Responsibilities

1. Define scope and draft project plan (all)
2. Ensure risks to project success are identified, monitored and mitigated for (all)
3. Contribute case studies and contacts (all)
4. Deliver a test/learn pilot (Oxford, Torbay, Stevenage)
5. Contribute to workshop planning and delivery (all)
6. Contribute to toolkit and report (all)
7. Contribute to communications strategy/delivery for promotion of the Toolkit and Report (all).

Frequency of Meetings

The steering group met monthly during the life of the project.

Tasks and Timeline

- Initially monthly (for 3 months) in start-up phase and then bi-monthly (9 months)
- The following table outlines the principle tasks involved in delivering the project including the deadlines for each and the responsible owner.

Task	Description	Start	End	Owner
Collate Case Studies, learning and place based approaches	Each of the Partner CCIN Members and Affiliate Members commit to attend a bi-monthly working group meeting to share learning and case studies. OCC as Lead reaches out to other CCIN members for good examples.	Mar 21	Apr 21	Oxford City Council to facilitate, partners contribute
Analyse collated approaches and shortlist tools and case studies	Analysis of approaches and agree shortlist of developed tools to test. Once tried and tested these tools will be shared and promoted in the Toolkit at the end of Policy Lab project.	May 21	May 21	Oxford City Council to facilitate, partners contribute
Milestone 1: Delivery of test and learn pilots	Pilots tested in 3 areas, delivery phase: 6 months.	June 21	Nov 21	Oxford/Torbay/ Stevenage partners to agree and test pilot tools
Plan workshops	Develop the design of the workshops including the audience and content.	Nov 21	Nov 21	Oxford City Council to lead, partners contribute
Milestone 2: Workshops delivery	Delivery of the workshops as designed.	Dec 21	Jan 22	Oxford City Council to lead, partners contribute
Develop toolkit	Collate all contributions into a toolkit that supports councils to replicate and transfer learning from the test and learn pilots.	Dec 21	Jan 22	Oxford City Council to lead, partners contribute
Write report	Drafting of a report describing the intentions, process and outcomes of this project to accompany the toolkit.	Jan 22	Feb 22	Oxford City Council to lead, partners contribute
Develop communications plan	Development of a communications plan to promote the toolkit and report to member and non-member councils, community groups and audiences.	Jan 22	Jan 22	Oxford City Council to lead, partners contribute
Milestone 3: Publish/ promote report	Implementation of the communications plan to coincide with the publication of the report and toolkit.	Mar 22	Mar 22	Oxford City Council to lead, partners contribute

Summary of Key Findings

'Growing an Inclusive Cooperative Economy' Policy Lab findings are summarised below by area.

Oxford

- Awareness of cooperative and democratic enterprise models is low among the target groups and further work is needed to embed recognition of the distinct value provided by democratic enterprise among commissioners and decision makers

- Oxford has a very strong Social Enterprise sector and support infrastructure and these models have successfully entered mainstream economic development discourse in the city. Although this stands as a positive in its own right, it means that, in the absence of an equivalent infrastructure for cooperatives, people/groups looking to form purposeful businesses tend to choose to establish under social enterprise structures (e.g. CICs) rather than cooperative and other democratic models

- Oxford is increasing understanding and awareness of the benefits of democratic business models through partnership with a Coop Development Agency. This will impact at both anchor and community level, and provide direct business development support to organisations exploring these organisational models

- In most cases the community led organisations engaging with the Owned by Oxford project are not yet large enough or sufficiently experienced to be able to win contracts to wholly provide services to councils or other large anchors

- Although many aren't of sufficient scale to deliver anchor contracted services, the Owned by Oxford map makes organisations more visible to purposeful 'middle tier' local organisations who can approach them directly for goods and services

- An additional benefit comes from increasing visibility to other likeminded organisations, creating opportunities to support and collaborate with peers, potentially leading to future collaboration around procurement opportunities for clusters of likeminded organisations

- The distinct benefits of cooperatives and other forms of democratic enterprise need to be recognised in any frameworks of social value which are being developed by anchor organisations if public spending is going to be successfully deployed at scale as a tool to enable future growth of the sector

- Although beyond the scope of this test-and-learn pilot, a useful follow-up exercise for the CCIN network to lead on would be the development of a subset of social value themes, outcomes and measures (TOMs), tailored to target outcomes uniquely provided by the democratic enterprise sector

- Mapping the cooperative economy in a region needs to be considered a long-term project, as a directory created without a good legacy plan will quickly become obsolete.

Preston

- It's essential to build awareness of democratic companies with anchors, in communities and with local businesses and trade unions. In Preston, work with Stir To Action, Preston Citizens and unions, for example, has really helped this

- Access to finance is a real problem. Coop Councils investing in supporting regional community banks will help with this

- There is a big opportunity with major trade unions getting behind the community wealth building (CWB) agenda. The Communication Workers Union (CWU) is actively looking to support its members into democratic businesses and support banking alternatives with union support

- Using reserve contracts from the local public sector to employ former prisoners and members of the disabled community is likely to see the establishment of at least two new worker cooperatives in Preston. This could be adopted in other local authority areas

- If there is a university in or close to an individual local authority area they are often very helpful partners through cooperative education and incubating new democratic companies for former graduates

- Maximising opportunities for procurement spend to link to new worker cooperatives to provide 'gaps' in local supply chain still needs to be cracked. Legally, this can be done but work is needed in communities to ensure key stakeholders take the opportunities available. This is especially important in large sectors like construction and social care when there is no possibility of insourcing

- The international dimension of CWB is very important as it is a growing movement especially in cities in the United States with interest from some in the Biden administration. This adds further legitimacy to this work especially in the context of a failed free market economics and desire for transformative change post pandemic worldwide.

Stevenage

- Skills and knowledge development is required amongst facilitators of the sector

- Requirements are not currently being met by the generic business support offer currently available, thus business support should be tailored, and business support providers need specialist sector advisers. This may require a change to how business support is procured

- Opportunities via the Council's procurement and planning processes need to be mapped and promoted to encourage cooperative growth

- Incentives are required to stimulate the sector.

Case Study 1 – Oxford

Oxford City Council and partners led on delivering a test and learn pilot between summer and the end of 2021 on cooperative mapping.

Aim of project

- To create a directory of purposeful businesses delivering in Oxford's areas of deprivation that can be disseminated to procurement teams in the local authority, anchor institutions and large employers in order to prioritise their tenders to promote social value, community wealth building and inclusive growth.

Outputs

- To produce a Social Value Suppliers directory
- To disseminate the directory to procurement teams in target anchor institutions, including large employers and local authorities
- To trial the directory as a 'test/learn' pilot as part of a 'Growing an Inclusive Cooperative Economy' Policy Lab.

The initial aim was to create a directory of purposeful businesses delivering in Oxford's areas of deprivation, a Social Value Suppliers directory to then disseminate to procurement teams in target anchor institutions, including large employers, local authorities and others. The directory would also act as a pilot for 'early intervention' on behalf of the Oxfordshire Inclusive Economy Partnership's Social Value and Procurement working group.

However, after a directory of cooperatives in the city's areas of deprivation was produced in draft it became clear that it would go quickly out of date and other more interactive ways of bringing together suppliers and procurers could be developed. With these considerations in mind two local initiatives were identified that shared many of our objectives, namely Oxfordshire Inclusive Economy Partnership and Owned by Oxford. The test and learn pilot pivoted to support these initiatives, which has given us an opportunity to document some of their early learnings about the challenges of mapping cooperatives as well.
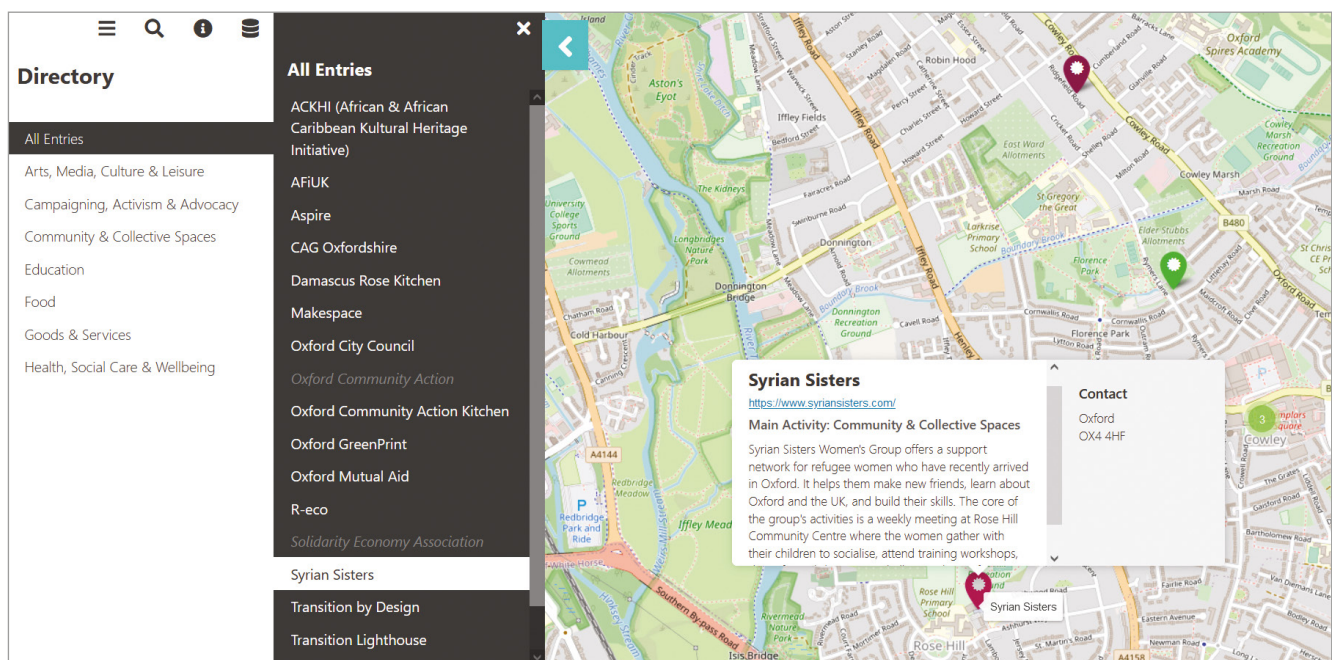
The Oxfordshire Inclusive Economy Partnership (OIEP)

The Oxfordshire Inclusive Economy Partnership is a countywide partnership of organisations from public, private and community & voluntary sectors who have come together to develop an inclusive economy agenda countywide. Relaunched alongside the Policy Lab project, the Oxfordshire inclusive economy partnership consists of a steering group led by Baroness Jan Royall of Somerville College and the University of Oxford's Conference of Colleges and Jeremy Long of Oxfordshire Local Enterprise Partnership (OxLEP) with oversight from Future Oxfordshire Partnership (formerly Oxfordshire Growth Board) and a series of working groups and workstreams.

The Partnership contains four interrelated working groups, focusing on:

1. Educational attainment
2. Inclusive employment
3. Social value and procurement
4. Place based interventions.

Case Study: The OIEP Social Value & Procurement Working Group

The Oxfordshire Inclusive Economy Partnership includes a working group with an objective to maximise the social value delivered through procurement activity in the county. The working group sees contracting for services through local, purposeful organisations as one way to add social value, either through direct delivery, through subcontracting opportunities, or through additional pro bono support provided to these organisations by non-local contractors as part of their social value commitments. There is currently no explicit reference within the procurement policies of partners to increase spend with cooperatives or other forms of democratic enterprise. The partnership is developing a locally specific OxTOMs social value framework – tailoring the national TOMs (themes, outcomes and measures) framework to reflect local values – which can be used to assess the relative social value that will be delivered through different tender responses. This will provide a robust and easily understood set of measures on social value, which could indirectly lead towards more commissioning through cooperatives and democratic enterprise.

The Oxfordshire inclusive economy charter will be launched in 2022 and is a statement of our shared commitment to creating a more inclusive local economy.

There may be future opportunities to incorporate a subset of measures which speak directly to the distinct forms of social value provided by these organisational types. The working group is also carrying out analysis of the procurement pipelines of partners and their associated supply chains, in part to identify future opportunities to contract with local purposeful businesses. This process will also identify gaps in these supply chains which could provide opportunities to incubate new entities to meet these needs.

In addition, the Oxfordshire Inclusive Economy Charter will be launched in 2022 and is a statement of our shared commitment to creating a more inclusive local economy, reflects the emergent ambitions of the Oxfordshire Inclusive Economy Partnership and is informed by learning from Stevenage that was contributed as part of the Policy Lab.

Owned by Oxford (OBO)

Alongside the Inclusive Economy Partnership, Oxford City Council is a key partner in an 18 month community wealth building project called Owned by Oxford, which launched at a similar time. Owned by Oxford is led by the Community Action Group Oxfordshire and includes Makespace, Aspire, Oxford City Council, and the Solidarity Economy Association (SEA) as founding partners. Owned by Oxford's work is overseen by a steering group made up of these five partnership organisations and representatives from five grass-roots community projects in the city – African Families in the UK, Syrian Sisters, Oxford Community Action, Mothers for Justice Ubuntu, and Transition Lighthouse.

The project takes an assets-based approach to community development, looking to be led by the energy on the ground but seeking to mobilise the resources, purchasing power, assets, and skills of the partners to support the development of grass-roots community enterprise. The ultimate objective of the project is to stimulate the development of democratic and community-owned enterprises in areas of disadvantage within Oxford.
 The project contains three interrelated workstreams:

1. Mapping and Community Research
    Involving extensive engagement within the target communities and through community anchors to develop a deep understanding of social and community enterprises formally and informally responding to community needs within the area. This information was recorded in an Airtable CRM system which was integrated with a digital mapping system to display key elements of the gathered data – detailed further below

2. Embedding CWB Practice in Anchor Organisations
    This workstream involves expanding and embedding community wealth building practice within the network of anchor organisations through policy development and engagement through forums such as the Oxfordshire Inclusive Economy Partnership and the Oxford City Council Community Wealth Building Working Group
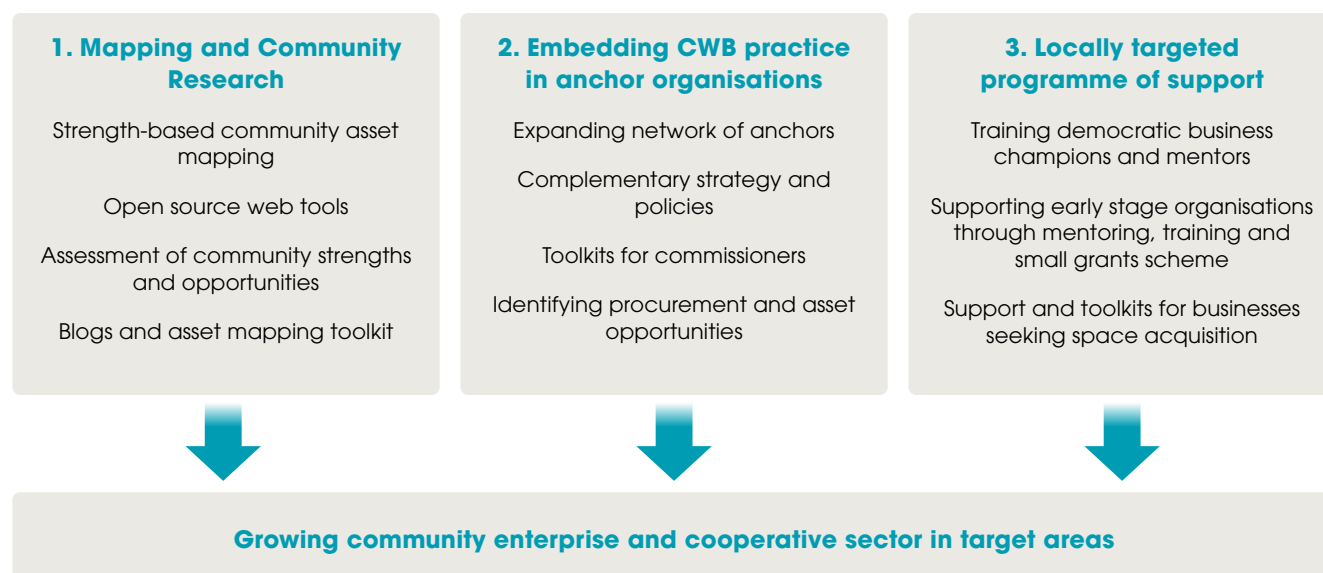
3. Locally Targeted Programme of Support
    Once identified, the partnership seeks to offer tailored support to organisations meeting the objectives and ethos of the project. This is different for each organisation but could include help accessing space, grants, business development or support.

Mapping and Community Research

The Mapping and Community Research workstream is most closely related to this test and learn pilot.

The Airtable cloud collaboration service was chosen as a suitable system for data gathering for the project by the OBO team. A CRM template designed for small not-for-profit organisations provided a powerful framework for the core team to collect and organise data as well as survey tools to involve others in data

1. Mapping and Community Research	2. Embedding CWB practice in anchor organisations	3. Locally targeted programme of support
Strength-based community asset mapping	Expanding network of anchors	Training democratic business champions and mentors
Open source web tools	Complementary strategy and policies	Supporting early stage organisations through mentoring, training and small grants scheme
Assessment of community strengths and opportunities	Toolkits for commissioners	Support and toolkits for businesses seeking space acquisition
Blogs and asset mapping toolkit	Identifying procurement and asset opportunities	

Growing community enterprise and cooperative sector in target areas

Although Oxford has a wider democratic business sector than many areas of the country, the distribution of cooperatives and community enterprises tends to cluster in specific areas and among specific demographics.

collection. The Digital Commons Co-operative (a new UK cooperative cofounded by SEA) developed an interface between Airtable and their digital mapping and directory platform. This enabled the OBO team to create publically visible maps and directories of some or all of the organisations they documented in the CRM system as well as maps which included cooperatives and other solidarity economy initiatives published from other sources.

Purpose

These maps serve a number of purposes. Fundamentally, if successfully promoted these maps can increase the visibility of purposeful community activity already underway within a locality. This could lead to a number of benefits:

- Highlighting the contribution these organisations already make to the area
- Making the activity visible to likeminded organisations and encouraging networks of solidarity and support
- Making this activity visible to policy and decision makers within anchor organisations
- Making visible the goods and services available locally to buyers within anchors and other local organisations.

Technical

Digital Commons provided the technology and knowledge base to create online maps which displays key information about an organisation or initiative and provides a standard classification.

The Airtable cloud collaboration service was chosen as a suitable system for data gathering for the project by the OBO team. They adapted an open source CRM template designed for small not-for-profit organisations by The Good Ship. This provided a powerful framework for the core team to collect and organise data as well as survey tools to involve others in data collection. The Digital Commons Co-operative (a new UK cooperative co-founded by SEA) developed an interface between Airtable and their digital mapping and directory platform. This enabled the OBO team to create publicly visible maps and directories of some or all of the organisations they documented in the CRM system as well as maps which included cooperatives and other solidarity economy initiatives published from other sources.

The maps can combine publicly available datasets on the cooperative sector from dotcoop and Coops UK and supplement this with the information gathered and input into the Airtable CRM through the (ongoing) community engagement process. The map also includes a simple webform which allows organisations to add their initiative or edit their details on the map. Web entries are checked by a member of the team for alignment with the objectives of the project before being confirmed for entry on the public map. The map will be launched on the website in the new year.

Later iterations of the mapping software will include automatic merging of data about organisations from different sources, enabling organisations to update their own data etc. The team are excited about offering support to other community wealth building projects with these tools and learnings.

Learning from the Mapping and Community Research Workstream

The mapping and engagement with community organisations highlighted a number of points of relevance to the objective of growing an inclusive cooperative economy.

Although Oxford has a wider democratic business sector than many areas of the country, the distribution of cooperatives and community enterprises tends to cluster in specific areas and among specific demographics.

The prevalence of cooperatives and other forms of purposeful business is much lower in the areas of Oxford targeted by the project, making it difficult to envisage direct commissioning opportunities with cooperatives in these areas within the life of the project. This pattern of poor representation of cooperatives in working class communities is something observed by SEA in their work across the country.

Community engagement with formally and informally constituted purposeful businesses in these areas has confirmed that awareness of democratic enterprise models is low among the target groups and further work is needed to embed recognition of the distinct value provided by democratic enterprise among commissioners and decision makers.

Oxford has a very strong social enterprise sector and support infrastructure and these models have successfully entered mainstream economic development discourse in the city. Although this stands as a positive in its own right, this success also inhibits the visibility of, and opportunities to grow, the cooperative and democratic business sector in the city.

Following the community research, the Owned by Oxford project has successfully identified funding to bring a coop development agency (Cooperative Futures) into the project. It is anticipated that this will increase understanding and awareness of the benefits of democratic business models at both anchor and community level, and provide direct business development support to organisations exploring these organisational models.

In most cases these organisations are not yet large enough or sufficiently developed to be able to win contracts to wholly provide services to councils or other large anchors. However, the map creates an opportunity to make these organisations more visible to purposeful 'middle tier' local organisations who can approach them directly for services, in the knowledge that they will be buying from an organisation that is local, purposeful and democratic in their design.

An additional benefit comes from increasing visibility to other likeminded organisations, creating opportunities to support and collaborate with peers, potentially leading to future collaboration around procurement opportunities for clusters of likeminded organisations.

The distinct benefits of cooperatives and other forms of democratic enterprise need to be recognised in any frameworks of social value which are being developed by anchor organisations if public spending is going to be successfully deployed at scale as a tool to enable future growth of the sector. Without direct reference to these values in policy frameworks, good intentions among officers are unlikely to be 'sticky' and won't create the promise of future opportunity which could influence the micro-level decision making on the constitutional form a new organisation might take.

Although beyond the scope of this test and learn pilot, a useful follow-up exercise for the CCIN might be the development of a subset of social value TOMs, tailored to target outcomes uniquely provided by the democratic enterprise sector.

As a starting point, this could build evidence towards a set of proxy values on the benefits of distributed ownership: for example, local wealth retention, distributed skills development, increased personal and community agency, engaged and happier workforce, improved health and wellbeing, greater organisational resilience to economic shock, and greater quality of provision through responsiveness to local needs.

Case Study 2 – Torbay

Aim of project

To understand the current state of Torbay's social enterprise sector and develop a Social Care Workers Cooperative to support new employment opportunities and the growth of employee ownership business models in Torbay.

Outputs

- An options analysis to recommend an appropriate model
- To pilot the recommended model as part of a 'Growing an Inclusive Cooperative Economy' Policy Lab on behalf of the CCIN.
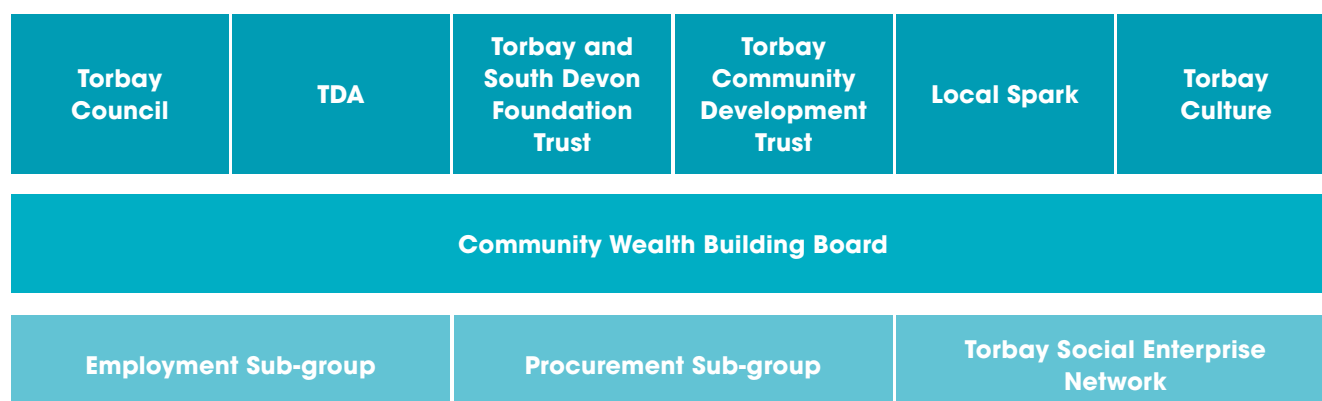
This test and learn pilot in Torbay was informed by research undertaken as part of Torbay's community wealth building programme which examined the recruitment challenges within the local adult social care sector and explored options to develop an employee ownership model/ cooperative to improve career aspirations, staff retention and pay within the sector as well as the efficiency and effectiveness of the services provided.

This research identified the two main reasons why a cooperative might increase carer recruitment (and retention) in Torbay. These are:

1. The potential to increase wage rates, compared with the private sector. This would be possible if the cooperative either:
   a) passed on to its workers all or part of any profit normally retained by private providers, or
   b) were able to reduce costs of delivery compared with private providers.
2. The potential to increase job satisfaction. This might come from:
   a) working with a small number of recipients of care regularly
   b) having the time to improve outcomes for them
   c) having a role in co-designing care
   d) working collaboratively with other carers, the care recipient, family members and volunteers
   e) working in what is called a 'relationship-centred' care model, rather than a person-centred one
   f) more training and career opportunities.

The report also identified that a worker cooperative would be more likely to increase carer recruitment if:

1. Carers were allowed considerable autonomy in working with clients to develop and deliver outcomes-based care. It would be worthwhile exploring whether Torbay Council would commission it to undertake care assessments (or at least assessment reviews) for its clients. Some interviewees have suggested this could save ASC money, as outcomes-based care plans lead to reablement, or at least more flexibility in how funds are spent.

Torbay Council	TDA	Torbay and South Devon Foundation Trust	Torbay Community Development Trust	Local Spark	Torbay Culture
Community Wealth Building Board					
Employment Sub-group		**Procurement Sub-group**		**Torbay Social Enterprise Network**	

2. It used specialist technology, such as the Care Friends app, to maximise recruitment.
3. Carers were encouraged to spread the word that the cooperative was a good organisation to join. This is because recommendations by existing carers are recognised as an effective way to recruit new carers. A multi-stakeholder cooperative has an additional objective to those of a worker cooperative, which is to give equal status and decision-making to workers and care receivers.

To be successful (and so increase carer recruitment), this type of cooperative would require all of the conditions and approaches needed for a worker cooperative, as well as:

1. Wider community engagement, particularly with (potential) care recipients, their relatives, and volunteers
2. Specialist community engagement support, ideally from an existing multi-stakeholder care cooperative, such as the Equal Care Co-operative.
3. Very robust financial forecasting, because experience shows it is comparatively difficult to make multi-stakeholder cooperatives financially viable. It is very likely that parallel initiatives would be needed, such as Individual Service Funds22, and permitting the cooperative to undertake care assessments
4. More time to design and develop.

Bearing in mind all of the above, the overarching conclusion regarding a worker care cooperative is that it has the potential to contribute to all of the three relevant CWB objectives because it could:

a) increase employment by attracting potential carers into, or back into, the carer workforce, by offering better pay, conditions and job satisfaction than private agencies
b) support the local economy by addressing the challenges the ASC domiciliary care sector faces in recruitment
c) improve health outcomes by increasing access to domiciliary and particularly outcomes focused care.

Case Study 3 – Stevenage

Aim of project

To understand the current cooperative movement across Stevenage with a view to encouraging its development via identifying growth opportunities and ensuring the right infrastructure is in place.

Outputs

- To develop a baseline of cooperative activity
- Gain a deeper understanding of the policy landscape and where an inclusive cooperative community fits within the Stevenage community wealth building agenda
- Gain an understanding of the business start-up/ support infrastructure
- To use the research as part of test/learn pilot as part of 'Growing an Inclusive Cooperative Economy' Policy Lab.

Stevenage Borough Council sees the opportunity to encourage the growth of its cooperative sector as part of its commitment to community wealth building. This commitment is encased in four pillars:

- Procurement and social value
- Training and skills
- Growing the social economy sector
- Tackling climate change.

The policy landscape facilitating this move includes the council's Cooperative Procurement Strategy 2021 – 2024 focusing on 'Building Wealth in our Community' and subsequently a Cooperative Inclusive Economy Charter encouraging communities, organisations and businesses to work together to help shape the economy and share the benefits of growth.

The pilot took various stages as follows:

- Research to understand the current cooperative movement in Stevenage and develop a baseline
- Review of policy and policy-based initiatives designed to encourage growth. This included developing an understanding of facilitators' knowledge and experience of the sector, the mechanisms that could be used to encourage growth of the sector, and thus their capability to deliver the agenda
- Developing an understanding of the unique requirements of cooperatives during start-up and growth stages including meeting the needs of the different types of cooperative
- Mapping the availability of business support to meet the sector's requirements and how we may reshape business support to meet the sector's needs
- Bringing together learnings: identifying challenges, findings and opportunities.

The number of cooperatives in Stevenage is small; there are nine organisations currently registered with Co-operatives UK, although it is understood this number could be greater because there are other cooperatives listed locally. So, there is huge opportunity for the sector to grow, whether through encouraging new start-ups, growing existing micro cooperatives, or transitioning existing businesses to the cooperative model.

The Council's Cooperative Procurement Strategy 2021 – 2024 and its Cooperative Inclusive Economy Charter provide the policy base for change, clearly describing its ambition and aims. The Council has begun to deliver in various ways including:
Commissioning the Social Value Portal to measure, manage and report social value, using the national TOMs. This has supported officers' initial understanding of social value in relation to procurement. The next stage for officers will be to map out the supply chains and explore the potential for new local enterprise opportunities and where cooperatives may fit and accessing funding specifically for the VCSE sector, including:

- Health Protection Board Funding to shore up the sector following COVID-19 (through a cooperative approach)
- Community Renewal Funding to pilot community wealth building initiatives across the county
- Piloting several initiatives working with all the boroughs and districts across Hertfordshire to share knowledge and learning
- Enhancing the Hertfordshire Opportunities Portal to increase usage by anchor institutions and

promoting more widely to ensure all communities have access to opportunities

- Reviewing the way districts and boroughs do business, developing a greater awareness of community wealth building and how procurement processes can create local opportunity both in terms of more jobs and use of the local supply chain
- Grants to pilot initiatives to help unemployed and economically inactive people move closer to the job market
- Grants to diversify the business support offer and try new methods and ways of working to effectively engage with and support the VCSE sector
- Considering how we are planning for community wealth. How can planning influence the shape of the local economy, and what infrastructure is required to make that happen (FE provision for example in meeting apprenticeship requirements).

The Social Inclusion Partnership (SIP), a collaboration of Stevenage based VCSE organisations of 30 years which has been looking at the differing types of incorporation to take the partnership forward can be used an example to understand complex needs of developing cooperatives.

Following intense research the decision was taken for the incorporation to take place through a staged approach. The initial stage would be to formalise the partnership into a federation with a constitution. This could then be used as a pilot for the organisation to look at partner's strengths and barriers, without an intense legal obligation. Using this approach, partners would be able to maintain their independence but benefit from the joint funding and support initiatives to take place with minimal risk.

In 18 months – 2 years the SIP is aiming to move this model into a multi stakeholder cooperative. Once stable and functional administration has been established, partners would then feel that they were confident to take on the additional obligations and risks that come with incorporation.

This has highlighted the complexities around developing cooperatives and the considerations required when transitioning existing organisations.

There is huge opportunity for the sector to grow, whether through encouraging new start-ups, growing existing micro cooperatives, or transitioning existing businesses to the cooperative model.

Initially the pilot looked to understand how the local business landscape met the needs of the voluntary community and social economy (VCSE) organisations to support inclusive growth. This included assessing whether these organisations had access to the same advice, support and guidance as the generic business base. Through conversations it was clear that the available business advice, support and activities to support enterprise and growth was generic, however there was recognition that the needs and challenges of cooperatives and VCSEs may not currently be fully supported, and that their needs are different to that of mainstream businesses.

Other key findings include:
- Currently support agencies are signposting organisations for specialised support at a national level, and this may need to change to support a developing cooperative sector locally
- The VCSE sector may not be accessing general business support as they do not recognise it is for them, so business support would need to be reframed to engage effectively with the sector. Funding for business support may not currently lend itself to supporting the VCSE sector

Opportunities

The following opportunities were identified by The 'Growing an Inclusive Cooperative Economy' Policy Lab, through its test and learn pilots by area.

Opportunities Oxford

- Micro grant process launched to support organisations in target areas with an 'intention to become democratic'
- Coordinating different scales – establishing the 'food chain' anchors buying from middle size purposeful organisations, who buy from smaller purposeful organisations
- Joining up the work of the Inclusive Economy Partnership and Owned by Oxford Project to spread the reach and impact to more anchors
- Setting anchor ambitions around cooperative and social enterprise economy and valuing benefits of democratic enterprise in social value frameworks
- Procurement pipeline mapping to identify future supply chain gaps and potential procurement or incubation opportunities
- Continue to flesh out and update the content of the OBO directory and map
- Create different versions of the maps for different audiences and promote them
- Support other CWB projects across the country with tailored regional maps and directories.

Opportunities Torbay

- Torbay Community Wealth Building Board to enable a multi-partner approach to addressing local socio-economic issues and supporting inclusive growth approach
- Setting anchor ambitions around cooperative and social enterprise economy
- Strong representation of social enterprises within the health and social care sector
- Inclusion of social enterprises within Torbay Council's Social Value Policy.

Opportunities Stevenage

- Collaboration among partners is enabling a multi-partner approach to addressing local issues using a cooperative approach
- This in itself is stimulating opportunities to arise in key sectors including the built environment, such as supporting retrofitting of the public estate to meet local net zero ambitions.

Barriers and Challenges

Challenges Oxford:
- No existing touch point for 'coop-curious' early stage organisations
- Strong social enterprise support sector
- Low number of cooperatives in project target areas
- Oxford's procurement policy doesn't make explicit reference to cooperatives.

Challenges Torbay:
- Low levels of cooperatives and lack of understanding around employee ownership business models
- Health and social care sector in Torbay – 25% of employment
- Ageing population
- Rate of turnover of staff within the social care is around 31%
- Perceived low status, pay, training and in-work support affects recruitment and retention in sector
- Difficult to attract and retain staff that have the right skills and values
- The challenge is exasperated by an ageing population
- Pay and terms of employment within the social care sector need to be addressed.

Challenges Stevenage
- Low levels and awareness of local cooperatives, with some cooperatives not linked into networks including Co-operatives UK
- Investment required to enable expertise to develop VCSEs
- Generic business landscape but firm recognition needs and challenges of cooperatives may not be fully supported and needs are different to that of businesses
- Commissioning of business support services aimed at mainstream businesses, who may deliver profit sooner than a VCSE.

Table: Policy Lab Identified Project Risks/Mitigations

Potential Risk	Description of Risk	Proposed Mitigation
COVID-19 Impacts:	Despite the national announcement of the roadmap to emerge from lockdown it is expected that continued risks to delivery caused by the stop-start nature of lockdown and isolation measures will continue and will affect the project at stages throughout esp. on timescales projected here.	A focus on delivery of workshops and test and learn pilots online via Zoom, Teams and equivalent media will therefore be assumed with live face to face interaction locally hoped for where appropriate/required but not expected.
Diversion of resource:	Diversion of constrained resources to support recovery activities and delivery of potential upcoming national programmes. This could result in the programme for the pilot being pushed back.	Each local authority or partner to appoint an officer or lead to designate time to the project.

Toolkit of Resources for Cooperative Councils

The following tools have been used by each of the
'Growing an Inclusive Cooperative Economy' Policy
Lab test and learn pilots. They are recommended,
and listed here for your use as a Cooperative Council.

Tool/Resource	Description	Link to further Information
OIEP Seminars Report	Final report for a series of Inclusive Economy Seminars undertaken in Oxford 2019-20, which formed the basis of the Oxfordshire Inclusive Economy Partnership (OIEP)	Inclusive Growth Seminar Series (oxford.gov.uk)
Owned by Oxford Community Mapping	Site for the Community Mapping and micro-grants for the Owned by Oxford (OBO) Project.	ownedbyoxford.org.uk/about
Co-op Directory & Mutual Public Register	Both proved really helpful to map cooperatives in the first version of the Oxford Co-operative Directory.	www.uk.coop/directory www.fca.org.uk/firms/mutuals-public-register
Stevenage's Co-operative Inclusive Economy Charter	Stevenage Borough Council motion in support of community wealth building in 2020 led to a charter to help to bring people and organisations together to create a more cooperative and inclusive economy	www.stevenage.gov.uk/town-and-community/community-wealth-building/a-cooperative-inclusive-economy-charter-for-stevenage
Stevenage Borough Council's Procurement Strategy	Please see the Procurement strategy for full details	www.stevenage.gov.uk/about-the-council/tenders-and-contracts/co-operative-procurement-strategy-2021-2024
An Adult Social Care Co-operative for Torbay Options Analysis	Torbay's ASC coop options analysis final report	Contact Daniel Newman to request
Torbay Social Enterprise Research	Torbay's research on social enterprise	investintorbay.com/our-projects/people-and-place/community-wealth-building/torbay-social-enterprise-research-2021/
Community Wealth Building 2.0	Preston's strategy for leading resilience and recovery through community wealth building	www.preston.gov.uk/media/5367/Community-Wealth-Building-2-0-Leading-Resilience-and-Recovery-in-Preston-Strategy/pdf/CommWealth-ShowcaseDoc_web.pdf?m=637498454035670000

Tool/Resource	Description	Link to further Information
Preston Cooperative Development Network	A small group of volunteers who have set up a cooperative to raise awareness of cooperation and help local people to start their own cooperative businesses	prestoncoopdevelopment.org
Preston Cooperative Education Centre	A new cooperative supporting learning and training in cooperation.	prestoncoopeducationcentre.org
North West Mutual	Building a new, ethical, trustworthy, customer owned bank serving all the people, small businesses and local organisations of the North West of England	nwmutual.co.uk
USE-IT! Project	Brought together organisations and individuals to work to unlock social and economic opportunities in the area by linking large capital developments and other opportunities (e.g. housing developments, Birmingham 2022 Commonwealth Games, Edgbaston Reservoir masterplan etc.) with local skills, talents and enterprises.	futures.coop/portfolio/unlocking-social-and-economic-innovation-together-use-it
Preston and Stir to Action's 'Community Anchors: A Co-operative Recovery programme'	Providing targeted support for minoritised community organisations in the city, stimulating cultural awareness and interest in worker-owned business.	www.preston.gov.uk/article/3260/Preston-City-Council-partners-with-Stir-to-Action-to-bring-greater-diversity-to-Community-Wealth-Building-and-the-co-operative-sector
Solidarity Economy Association	Supporting the growth of the solidarity economy by educating, empowering and inspiring communities who are committed to economic and social justice and giving them the confidence to create, join or support initiatives that live and breathe these values.	www.solidarityeconomy.coop
The Digital Commons Cooperative	A platform cooperative owned by its users, workers, investors, and data providers. Using GIS, mapping, linked data and other tools to help social justice and solidarity economy organisations make real change.	digitalcommons.coop

Further Information and Support

Owned by Oxford:
- Map launching soon on **ownedbyoxford.org.uk**
- Contact Simon Grove-White (**Sgrove-white@oxford.gov.uk**) or Anna Thorne (**Anna@cagoxfordshire.org.uk**) for more info on the project.

Oxfordshire Inclusive Economy Partnership:
- Contact: Clayton Lavallin (**clavallin@oxford.gov.uk**) for more info.

Torbay (TDA):
- Contact: Daniel Newman (**daniel.newman@tda.uk.net**) for more info.

Stevenage:
- Contact: Mena Caldbeck (**Mena.Caldbeck@stevenage.gov.uk**) for more info.

Preston:
- Contact: Cllr Matthew Brown (**cllr.m.brown@preston.gov.uk**) for more info.

Development Coop:
- Contact: Martin Strube (**strube.m@gmail.com**) for more info.

Growing an Inclusive Cooperative Economy Policy Lab:
- Contact: Clayton Lavallin (**clavallin@oxford.gov.uk**) for more info.

Co-operative Councils Innovation Network

For more information, see www.councils.coop

To find out more about joining the CCIN contact: hello@councils.coop

CCIN Accountable Body: Oldham Council, Oldham Civic Centre, West St, Oldham OL1 1UL T: 0161 770 5691.

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Find out more about the UK local authorities who are driving global municipal cooperative policy development with a common belief in the Cooperative Values and Principles.

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