



## Field Guide: Board Communication: Using the Board's Unique Perspective to Increase Owner Engagement and Participation

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There's commonly a remarkable diversity among how the members of a co-op's board of directors and how co-op staff see and understand the co-op. And the perception of the myriad owner members are as distinct and individual as the members themselves. And yet each group is holding a unique piece of wisdom about the cooperative. This field guide offers boards tools and resources to help communicate their perspective and voice to increase owner engagement and participation in their cooperative.

Directors commonly lament their lack of active engagement with owners, who as a rule are difficult to entice to annual meetings or other member engagement activities. And yet the Board of Directors is accountable to the owners for everything that happens at the co-op. Every transaction at the register, every conversation at the customer service desk, every call to check on the hours and hot bar menu happens because of board members' willingness to serve and hold the fiduciary responsibility for the co-op by employing and empowering the General Manager to create a vibrant community resource via the retail store. But what more can directors do to increase owner participation? With the help of the General Manager and her staff, the sky's the limit!

### To Each Their Own

To effectively use the board's role and voice, it's important for both board and GM/staff to spend time thinking critically about the co-op's owners. As directors and active members of the co-op, board members are unique and should recognize that they likely have quite different views from the majority of members and shoppers. After all, they spend hours preparing for and attending board meetings, working to understand and guide the co-op. It's critical for board and staff to acknowledge that many co-op owners are quite happy with a lower level of engagement--and most may be content to simply shop their co-op! Taking the time to think about who is participating and how they are participating at your co-op can be well worth the effort toward improving communication and creating more effective means of engagement.

The first step toward better communication is acknowledging that some members are more involved than others and that's ok. Marilyn Scholl uses Maslow's Hierarchy of Needs to tackle the member engagement issue. According to Maslow, human needs are arranged in a hierarchy from the most to the least pressing—from basic physical and economic needs, to social needs, then to higher level needs. When a need is satisfied, it ceases to be a motivator, and we move on to the next level.

Applying that thinking to a food co-op, Marilyn suggests we consider the largest group at the bottom of the hierarchy to be customers meeting their basic physical needs by purchasing groceries at the co-op. In the middle are members who in addition to shopping, use the co-op to help fulfill a sense of belonging to, to be a part of the greater community. The smallest group, the most active members, are vocal and participate in thinking and decision-making. See Marilyn's Cooperative Grocer article, [Appreciating the Diversity of Member Needs and Motivations](#), for a more detailed description of her hierarchy of participation.

### Meet Them Where They Are

In Marilyn's model, the goal is that each person has a high degree of satisfaction with their level of involvement and there is easy access for participants to change their level of involvement if they wish. People need to be satisfied at one level before they will be motivated to "move up." It becomes the role of the board to ensure a welcoming culture which invites people to move to a new level of participation and engagement without making them feel guilty if they are happy where they are.

Marilyn's model also serves as a framework for several ideas about board governance. Board members will likely crave more active engagement and dialogue with members--that's a good thing! The board needs to communicate that all levels of co-op participation are welcome and appreciated and that all members are important and deserve to be heard. The board's job is to ensure the co-op is there to serve to meet the needs of its members. To do that, it needs to balance two competing tensions: it needs to listen to all, or the vast majority of voices, not just the vocal minority. And yet at the same time, it must make sure that the majority does not silence or disempower its minority perspectives which can often help bring new ideas and challenge the cooperative to stretch and change. Above all, every participant should know they have been heard and have positive feelings about the co-op.

### **Speak Their Language**

Directors can use Marilyn's model to think about those perspectives that may not otherwise be loud and clear and about how co-op decisions and actions may impact people who have different needs (before the decisions are made). Directors may find that the co-op marketing team can play a key role in helping the board develop a more holistic perspective of the membership and tell the co-op's story. Together, directors, GM, and marketing staff can plan strategic communications, activities and opportunities for engagement with cooperators at different levels. Set goals, allocate resources and evaluate the effectiveness of those efforts, taking into account varying perspectives, from shopper to board member.

Here are a few ideas to get your board thinking about communicating to owners throughout the hierarchy at the co-op:

- Ask management to support the board with a communication plan, and collaborate with them around implementation as their capacity and priorities allow. The general manager should help the board do their job of engaging members by providing resources, and work with the board to help figure out where it makes sense for the board to get involved in the process.
- Divvy up the different participant groups among small board member teams and brainstorm specific communication ideas for each group.
- Discuss and prioritize which group should be the focus of what particular communication effort(s) The next step might be in making a timeline that would include activities or touch points that made sure all groups were reached in some way. Think about communication in terms of one-way board-to-owner (newsletter), one way owner-to-board (owner survey) and two-way opportunities (annual meeting)
- Be part of the leadership team in thinking about the co-op as a business connected to and centered in community. Work with your management team to expose the co-op to new audiences who aren't familiar with it: change the venues where you table and participate in town activities by attending community organization meetings or events along with the GM.
- Let shoppers know that the board is present beyond newsletters. Be present in the store during owner appreciation days or other important days—no speeches, no plan of attack—just walk the aisles and chat. Or help bag groceries or hand out samples. Being neighborly and actively listening goes a long way in understanding others' perspectives.
- Begin an honest dialogue about diversity at the co-op. The board can be the place where this dialogue begins, but the conversation has a place in every aspect of the co-op. The board could start by considering the questions 'Who are we serving now and why? To whom do we want to make the benefits of membership available and why?'

Don't get frustrated or give up if member attendance is low at events or it seems no one is reading your articles. That's part of the structure--it's healthy for board members to want more owner engagement. It's a really big job. And it's an individual path; everybody is going to approach ownership from a different place. There will be people who will never want to belong on that level and that's ok. Your communication task is to make sure everyone can understand what the benefits are of being a member and make sure it's easy for people to make the decision to join, be accessible, and welcome anyone to participate at the level they choose.

## Questions & Resources

How can we develop methods of consistent, transparent owner engagement to establish trust in governance?

- **Resource** [Creating Board Holism in Board Communication](#)
- **Resource:** [Board Holism: Online Workshop](#)

How can we clearly articulate the cooperative's goals and translate them into inspiring avenues for participation for all in co-op life?

Consider the following:

- [The Patronage Primer](#), multiple authors, published by CDS CC, Cooperative Grocer and Wegner CPAs
- [Planning a Member/Owner Capital Campaign](#)
- **Nominations Resource:** [Streamline Nominations and Elections to Ensure Future Governance](#)
- **Resource:** [Striking the Balance for Co-op Success](#)
- LEADer, Great Governance, Annual Meetings, Fall of 2014 ([pdf](#))

How can boards best communicate to owners about difficult or non traditional decisions?

- **Resource:** [A Board's Quick Guide to Communicating Decisions to Owners](#)

How can boards develop patterns in their work for thoughtful ends and goals evolution and reinforcement?

- **Resource:** [Including Members in the Ends Dialogues](#)

How can we tell the Co-op's story?

- **Resource:** [What Startups Can Teach Us About Participation](#)
- **Resource:** [Telling the Co-op Story](#)
- **Resource:** [Reaching Co-op's Owners](#)
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**How can** we think strategically about relating to the members as owners, differently and [distinctly from relating](#) to the members as customers?

- **Resource:** [Appreciating the Diversity of Member Needs and Motivations](#)
- **Resource:** [Building Partnerships Across Race and Class](#)

What are some ways the board can establish and maintain a relationship with members as owners? What are some pitfalls to avoid?

- **Resource:** [Getting on the Train: Social Media and Co-op Boards](#)
- **Resource:** [Who Decides? Owner Participation in Cooperative Decisions](#)

What words can the board use to explain how it does its work?

- **Resource:** [What is Board Holism or Speaking with One Voice?](#)
- **Resource:** [Who Decides? Owner Participation in Cooperative Decisions](#)

How can the co-op leverage and align both the roles of board and management to improve the co-op's engagement and communication with members?

- **Resource:** [Cooperative Communication Conundrums: Exploring paths to alignment and healing when a cooperative encounters controversy](#)

How can the GM and Board work together so the board has a role distinct from yet aligned with management's member relations?

Great question! We hope this Field Guide has given you a lot to think about as you work towards greater depth and opportunity for participation at your co-op. Some of the things we imagine co-ops will create include transparent, trusting communication, tightly crafted board executive limitation policies specifically focused on developing robust, and meaningful member engagement/participation (as opposed to simply metrics). What are you creating at your co-op? Share your stories with us (insert how here).