

New Board Members



Your journey to cooperative housing excellence begins here!



Instructors Manual

New Board Member Class

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Guide to Course for Instructors

Dear Instructors,

Welcome to our instructional team! We appreciate your commitment to enhancing the lives of individuals in cooperatives. Your expertise is vital in empowering Board Members, transforming communities, and shaping the future of cooperative housing.

Course Overview

This resource will equip you with the tools and information necessary to guide new board members in cooperative governance effectively. Inside, you will find organized content that facilitates engaging and informative sessions, enriching the learning experience for all participants.

Structure of Each Chapter

1. **Video Overview:**

Each chapter begins with a brief video that introduces key concepts.

2. **Instructor Overview:**

This manual provides an overview following the video to deepen your understanding of the topics, ensure you are prepared to answer questions, and foster discussions.

3. **Discussion Questions:**

The following slide includes six questions for review with students, summarizing essential points and reinforcing critical information.

Teaching Methodology

Instructors will use diverse methods to cater to different learning styles:

- **Visual Learners:**

Slides for visual engagement.

- **Auditory Learners:**

Lectures provide auditory information.

- **Verbal Learners:**

Small group discussions to encourage verbal interaction.

- **Kinesthetic Learners:**

Activities involving movement to enhance engagement.

While debates on learning styles exist, adapting your teaching strategies to align with students' preferred styles can enhance knowledge retention and understanding.

Learner Rights and Responsibilities

Our mission is to deliver high-quality, evidence-based education that equips individuals with the skills to address the challenges faced by Board Members. Achieving this goal requires training environments that promote open, nonjudgmental communication. Learners play a vital role in fostering these environments by adhering to the following rights and responsibilities.

Learners have the right to:

- **A Safe Learning Environment:**

Learners are entitled to a setting that encourages open dialogue and communication, free from harassment or discrimination based on race, religion, color, age, sex, gender, sexual orientation, national origin, or culture.

- **Clear and Consistent Instruction and Evaluation:**

Instructors will clearly outline course objectives, requirements, and evaluation criteria before the instruction begins.

- **Equal Access to Resources and Learning Materials:**

Learners who require accommodations under the Americans with Disabilities Act should notify the instructor regarding any necessary adjustments related to instructional materials.

- **Have Grievances Addressed Appropriately:**

If a learner has a grievance that falls within the instructor's purview, they should communicate this to the instructor as soon as possible.

Learners have the responsibility to:

Participate:

Engage actively in the learning process throughout the course. Participation in every activity is encouraged, though learners may opt out of activities that make them uncomfortable.

- **Be Respectful:**

Show respect for the viewpoints of others, regardless of personal agreement or acceptance.

- **Ask for Help:**

Seek clarification or assistance if any instructional material is unclear. Request any necessary accommodation before the course start date.

- **Be Present:**

To qualify for a certificate, students must attend at least 90% of the course and engage in at least 70% of the activities.

We can create a supportive and effective learning environment that benefits all participants by upholding these rights and responsibilities.

Course Objectives

What You'll Learn:

Our course covers a wide range of essential topics, including:

- Understanding cooperative housing models and their history.
- Legal frameworks and governance structures.
- Effective financial management and budgeting.
- Maintenance and repair strategies for a well-maintained community.
- Strategies for building and maintaining a diverse and engaged membership.
- Property management best practices.
- Legal compliance, regulations, and risk management.
- Conflict resolution and dispute handling.
- Marketing and membership growth.
- Long-term planning and sustainability.
- Embracing technology and innovation.
- Sustainable and green practices.
- Crisis management and preparedness.
- Cultural diversity and social cohesion.
- Future trends and challenges in cooperative housing.
- Effective communication strategies.
- Tools for building and fostering community.

Welcome



Introduce yourself to learners.

Share the following information, but keep your introduction brief:

- Your name
- Your experience in Housing Cooperatives
- Thank learners for their attendance in today's course.
- Ask learners to write their names on the name tags or tent cards.
- Distribute the NBM Manual

Housekeeping

- Provide directions to the restrooms and emergency exits.
- Provide any relevant shelter-in-place or evacuation information.
- Learners can move around or step outside the room as needed.
- Remind learners to silence mobile devices.
- Ensure that your own mobile devices are silenced.

Course agenda:

Review of the course agenda

Determine when you will take breaks and how long they will be. Keep in mind that the course includes 7.5 hours of instructional time, and any breaks will add to the duration of the course.

Optional icebreaker activity

The purpose of this activity is for learners to meet each other.

Choose from one of the following icebreaker options or use one of your own. Keep in mind that the icebreaker should take no more than 10 minutes to complete.

Encourage all learners to participate in the icebreaker but remember that learners may opt out of any activity that makes them uncomfortable.

Activity: Think about

Materials:

- Name tags or tents

Process:

- Invite learners to introduce themselves by sharing their names

Then, **ask** learners to share one of the following:

- Favorite hobby
- Favorite family or community tradition
- Favorite season of the year and why
- Instructors are also encouraged to participate in this activity.

Remind learners that they should only share what they are comfortable disclosing.

Activity: Parallel line introductions

Group size:

- Best with larger groups of 20 or more learners

Materials:

- Self-adhesive name tags

Process:

- Ask learners to write their names on their name tags.
- Ask learners to place their name tags on their bodies where it is visible.
- Ask learners to form two lines facing each other.
- Make sure every person is standing directly across from another person.
- If you have an odd number of learners, an instructor should participate.

Learners will have no more than 15 seconds to introduce themselves. Ask learners to introduce themselves with a wave. They should **share** their name, occupation, and one interesting fact about themselves.

After both learners have introduced themselves, shuffle the line by having the person on the end of one line move to the front. Continue with this process until learners have met approximately half the group.

Activity: Name story

Group size:

- Smaller groups of 10-15 people

Materials:

- Name tags or tents

Process:

- Learners should briefly introduce themselves to the larger group by sharing some background information about one of their names — first name, last name, or nickname.
- Each learner will have no more than 30-45 seconds to introduce themselves.

Introducing Berendson Academy



This is a screenshot of the Berendson Academy webpage. It notifies everyone that the class was written and designed by Berendson Academy.



Video introducing Berendson Academy

Video overview of the Berendson Academy website, highlighting free resources available.

Overview of Chapters

Chapter Topics	
	1 Cooperatives
	2 Housing Cooperatives
	3 Cooperative Documents
	4 Housing Cooperative Structure
	5 Board of Directors
	6 Officers of the Co-op
	7 Directors Leadership
	8 Strategic Planning
	9 Directors Governance
	10 Policies
	11 Cooperative Rules
	12 Cooperative Finance
	13 Working with Professionals
	14 Management
	15 Meetings
	16 Parliamentary Procedures
	17 Cooperative Members
	18 Cooperative Community
	19 Communication
	20 Cooperative Community 

What to expect in each chapter

Consider starting with an engaging and motivational introduction highlighting the importance of cooperative boards in communities and the potential impact new board members can have.

Introduction Chapter

- Congratulations on Your New Role!
Feeling Overwhelmed? Let's Navigate Together!
- Unlocking the Path to a Fulfilling Role: Traits of Successful Board Members
- Staying Cool Amid Challenges: Managing Conflict Gracefully
- Collaboration for Community Excellence: Leveraging Community Partners
- Embracing Humility: The Foundation of Effective Board Membership

Chapter 1: World of Cooperatives.

- Unraveling the Rochdale Principles: The Birth of Cooperatives
- Unveiling the Rich Tapestry of Cooperatives
- Exploring the Vibrant World of Cooperatives
- Navigating the Enchanting World of Cooperatives
- Embracing the Cooperative Spirit

Chapter 2: Housing Cooperative

- The Historical Landscape of Housing Cooperatives - A Journey Through Time
- Diversity in Cooperative Housing Models: A Kaleidoscope of Choices
- The Heartbeat of Cooperatives: Principles and Values
- Limited Equity Cooperatives: Where Dreams Meet Affordability
- Advantages of Cooperative Living: Nurturing Communities, Fostering Security

Chapter Topics		
	1	Cooperatives
	2	Housing Cooperatives
	3	Cooperative Documents
	4	Housing Cooperative Structure
	5	Board of Directors
	6	Officers of the Co-op
	7	Directors Leadership
	8	Strategic Planning
	9	Directors Governance
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	15	Meetings
	16	Parliamentary Procedures
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Chapter 3: Cooperative Documents -

- Cooperative Governing Documents - A Roadmap to Harmony
- Documents Establishing the Operation of the Corporation
- Documents Establishing the Relationship Between the Cooperative and Members
- Documents Establishing Relationship Between the Cooperative and External Agencies
- Documents Regulating Cooperatives and Directors

Chapter 4: Cooperative Structure

- Responsibilities of Directors: Navigating the Cooperative Landscape
- Legal Obligations of Directors: Ethical Governance
- Authority of Directors: Governance Dynamics

Chapter 5: Board of Directors:

- Director's Overview:
- Director's Responsibilities
- Qualities of a Good Director
- Director's Role
- Legal Responsibilities of a Director

Chapter 6: Officers of the Co-op

- Directors
- Presidents Role
- Vice President's Role
- Secretary's Role
- Treasurers Role

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Chapter 7: Director Leadership

- Leadership Overview
- Director Stewardship
- Directors Cultivating
- Organizational Traditions

Chapter 8: Strategic Planning

- The Significance of a Strategic Plan
- Crafting Your Strategic Plan
- Strategic Planning Roles
- Guiding Principles

Chapter 9: Navigating Governance

- Governance Unveiled
- The Heart of Governance: Mission and Vision
- Governance: More Governing, Less Managing
- Enhancing Governance
- The Gospel of Good Governance

Chapter 10: Crafting Effective Policies

- The Purpose of Policy
- Creating a Policy:
- Common Policies

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Chapter 11: Cooperative Rules:

- Rule Creation
- Effective Rules and Regulations
- Strategies for Voluntary Compliance

Chapter 12: Navigating Finances

- Financial Management: Safeguarding Your Community's Wealth
- Finance Reserves:

Chapter 13: Working with Professionals

- The Attorney: Guiding Your Legal Journey
- The Certified Public Accountant: Mastering Financial Health
- The Insurance Agent: Safeguarding Your Community
- The Reserve Specialist: Preserving Your Assets

Chapter 14: Management

- Management Overview:
- Management Role:
- The Selection Process:
- Evaluating Management by Objectives:
- Meetings Interruptions: Focusing on Efficiency and Engagement

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Chapter 15 Meetings:

- Meetings Overview: Unleashing the Power of Effective Meetings
- Types of Meetings: Navigating the Meeting Landscape
- Meeting Basics: Preparing for Success
- Running the Meeting: Navigating the Meeting Landscape

Chapter 16: Parliamentary Procedures

- Parliamentary Procedures Unveiled: Unlocking the Mystery
- Mastering the Art of Motions: A Guided Tour
- Beyond the Basics: Mastering the Art of Meetings
- Conclusion: Embracing Parliamentary Procedures for Effective Meetings

Chapter 17: Cooperative Members

- Embracing the Cooperative Spirit: Members at the Heart
- Maintenance: The Lifeblood of Cooperatives
- Conclusion: Building a Brighter Future Together

Chapter 18: Building a Strong Cooperative Community

- Committee Function: Navigating the Heart of Your Cooperative
- Charges to a Committee: The Blueprint for Action
- Serving as a Committee Liaison: The Glue Between Board and Committees

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Chapter 19: Communication

- Communication Overview
- Crisis Communications

Chapter 20: Developing Community

- Developing Community
- Community Benefits
- Overview of what you will learn in this class.
- Course Objectives

Introduction to your exciting journey as a cooperative board member



Video Introducing Introduction Chapter



Chapter 1:

World of Cooperatives:

Cooperative New Board Training Course



Welcome



Slide 8 - Video

Overview of what topics were covered in chapter 1

Introduction to Cooperatives:

Welcome to the cooperative movement, which emphasizes its dynamic, member-driven nature and offers a unique role in shaping the future of the cooperative.

The Rochdale Principles:

The birth of cooperatives can be traced back to 1844 in Rochdale, England, when local artisans formed a cooperative to achieve fair pricing and share profits.

Open Membership:

- Inclusivity, regardless of gender, race, or socio-economic status.

Democratic Control:

- Members manage cooperatives through consensus.

Surplus Distribution:

- Profits are shared among members, promoting collective ownership.

Limited Interest in Capital:

- Minimizing excessive gains from capital contributions.

Political and Religious Neutrality:

- Focus on economic welfare.

Cash Trading:

- Ensuring financial stability.

Promotion of Education:

- Investing in members' education about cooperative principles.
- Evolution of Principles:

Navigating the Enchanting World of Cooperatives

Unveiling the Diversity of Cooperatives

The beauty of the cooperative model lies in its chameleon-like adaptability. It's a canvas where cooperation can take countless forms, allowing individuals to unite and pursue common aspirations. In this section, we embark on a journey to explore the captivating spectrum of cooperative types, each with its unique essence and mission

.

1. Consumer Cooperatives: Power to the People

Consumer cooperatives, as the name suggests, are owned by the very people who purchase their goods or use their services. These cooperatives are designed to cater to the needs of their members, offering quality products or services at reasonable prices.

2. Worker Cooperatives: Employees at the Helm

Worker cooperatives are a shining example of democracy in action. Every employee is a worker and a co-owner, participating equally in the cooperative decision-making process.

4. Producer Cooperatives: Strength in Unity

Producer cooperatives are formed when independent producers, such as farmers or artisans, join forces to collectively process and market their products. Together, they wield more significant market influence.

5.

4. Purchasing Cooperatives: Harnessing Collective Buying Power

Businesses establish purchasing cooperatives, often known as buying clubs, to consolidate their purchasing power. This approach enables them to procure goods and services from suppliers at reduced costs.

5. Multi-Stakeholder Cooperatives: Harmony in Diversity

Multi-stakeholder cooperatives combine elements from various cooperative types, engaging different member groups—such as workers, consumers, and producers—in a shared venture.

Essential responsibilities include serving as guardians of the cooperative's vision, understanding the cooperative's history, embracing continuous learning, advocating for member interests, and cultivating personal attributes that foster effective leadership.

Embracing the Cooperative Spirit

Illuminating Your Role in the Cooperative Movement

Welcome to the heart of the cooperative movement, where your journey as a board member or director takes center stage. In this section, we illuminate the path ahead, one brimming with privileges and responsibilities, and underscore your pivotal role in safeguarding the cooperative's essence.

1. Understanding the Weight of Your Role: Guardians of the Cooperative Vision

Your board member's or director's tenure signifies more than just a title. It's sacred trust. You become the guardian of the cooperative's vision and values, nurturing its growth and ensuring member welfare.

2. Deep Dive into Cooperative History: Anchoring in the Past for a Brighter Future

While the present and future beckon, exploring the cooperative movement's history provides invaluable insights; it unveils the challenges surmounted, the principles cherished, and the milestones achieved, all of which underpin the collaborative spirit.

3. Embracing Continuous Learning: Navigating the Ever-Evolving Landscape.

The cooperative landscape is dynamic and constantly evolving. To steer cooperatives toward success, it's essential to stay informed, adapt to change, and foster an environment of continuous learning.

4. Advocacy and Representation: Amplifying the Cooperative Voice

Your position extends beyond the cooperative's borders. It empowers you to advocate for policies that benefit members, forge strategic alliances, and represent the cooperative's interests in various arenas.

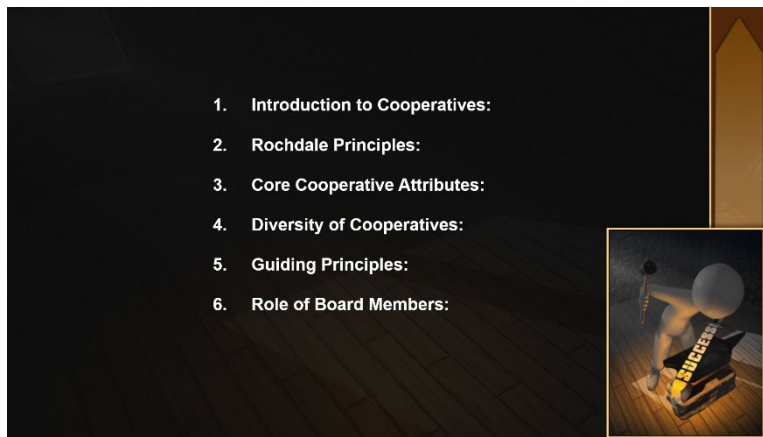
4. Personal Attributes for Success: The Building Blocks of Effective Leadership

Specific personal attributes can make a substantial difference in your role. Empathy, integrity, strategic vision, and adaptability enhance your adequate leadership capacity.

As we conclude this section, you stand at the threshold of a transformative journey that blends privilege with responsibility and aspiration with action. By embracing the cooperative ethos, learning from its history, staying agile in an ever-changing landscape, advocating passionately, and nurturing essential personal attributes, you can guide the cooperative toward a future filled with promise and prosperity.

Conclusion:

Chapter 1 lays the foundation for understanding cooperatives, setting the stage for deeper exploration of the cooperative movement as the journey continues.



Chapter 1 Review

1. **Introduction to Cooperatives:**

Highlights the member-driven nature of cooperatives and their role in promoting community welfare.

2. **Rochdale Principles:**

This philosophy emphasizes the foundational principles established in 1844, including open membership, democratic control, profit sharing, and education.

3. **Core Cooperative Attributes:**

It focuses on member ownership, mutual benefits, and equitable decision-making, which set cooperatives apart from traditional businesses.

4. **Diversity of Cooperatives:**

This section describes various types of cooperatives, including consumer, worker, producer, and multi-stakeholder, illustrating their versatility across different sectors.

5. **Guiding Principles:**

Outlines the ICA's essential principles that govern cooperatives, promoting autonomy, education, and community focus.

6. **Role of Board Members:**

Stresses the importance of board members and directors as guardians of the cooperative's vision, fostering leadership and member advocacy.



Chapter 2

HOUSING COOPERATIVES

New Cooperative Board Member Course



Chapter 2:
Housing Cooperatives

The Vibrant Tapestry of
Housing Cooperatives

Overview of what topics were covered in chapter 2

Historical Landscape of Housing Cooperatives:

Ancient Beginnings:

- Cooperative living has its roots in ancient Babylon, where communal living led to the development of early forms of resource sharing.

19th Century Europe:

- The movement emerged in response to poor housing conditions during the Industrial Revolution, driven by social reformers advocating affordable housing.

Resilience in Adversity:

- Housing cooperatives navigated economic challenges, such as the 1929 stock market crash and post-World War II changes, adapting to their members' evolving needs.

Expanding Accessibility:

- Initially, housing cooperatives evolved to serve diverse income levels, emphasizing affordability and community living.

Diversity in Cooperative Housing Models:

Market-rate cooperatives:

- functions similarly to conventional real estate markets.

Limited-Equity Cooperatives:

- Preserve long-term affordability through resale price limits.

Leasing Cooperatives:

- Manage shared governance over leased properties.

Specialized Cooperatives:

- Include senior housing, student housing, artist cooperatives, and those catering to special needs.

Principles and Values of Housing Cooperatives:

- Distinctive Ownership: Redefines ownership as a personal investment in community well-being, enhancing emotional ties among members.

Spirit of Cooperation:

- Promote equality, inclusiveness, and democratic control, ensuring every member's voice is valued.

Characteristics:

- Cooperatives are adaptable, resilient, and balanced, blending social and business objectives to deliver high-quality housing.

Limited Equity Cooperatives:

Conceptual Backbone: Aims to make homeownership attainable while preventing excessive future appreciation to maintain affordability.

Equity Limitation

- Approaches: These include direct restrictions on equity growth and income-based membership criteria, striking a balance between access and financial sustainability.

Benefits and Challenges:

- Offer stability and affordability but face challenges in financing and discouraging investment incentives.

Advantages of Cooperative Living:

- Economic Viability: Lower living costs than traditional rentals, avoid landlord profit margins, and benefit from tax incentives.

Ownership Pride:

- Members develop a vested interest that enhances community maintenance and security.

Influence and Autonomy:

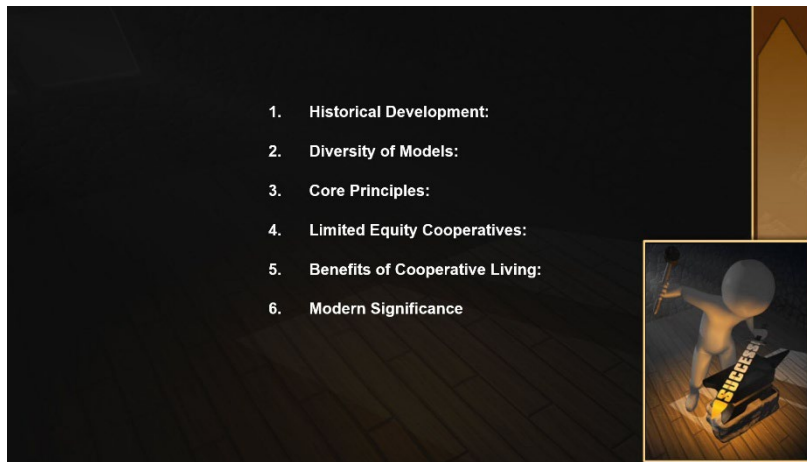
- Members participate in governance, nurturing personal growth, and strengthening community bonds.

Conclusion:

Chapter 2 offers an in-depth examination of the historical development, diverse models, foundational principles, and multifaceted benefits of housing cooperatives as a sustainable housing solution.

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Chapter 2 Review



1. **Historical Development:**

Cooperative housing originated in ancient communal living and evolved significantly during the 19th century due to the poor housing conditions that arose during industrialization. It later expanded into the United States.

2. **Diversity of Models:**

Various housing cooperative types exist, including market-rate, limited-equity, and leasing cooperatives, as well as models catering to specific groups, such as seniors, students, and artists.

3. **Core Principles:**

Housing cooperatives emphasize democratic control, inclusiveness, and personal investment in community well-being. They also have evolving decision-making processes that prioritize member needs over profit.

4. **Limited Equity Cooperatives:**

These models balance affordability and homeownership aspirations by limiting equity appreciation. Thus, they keep homes accessible while ensuring long-term community stability.

5. **Benefits of Cooperative Living:**

Cooperative housing fosters economic viability, pride in ownership, and collective influence, resulting in lower living costs, improved community security, and strong inter-member bonds.

6. **Modern Significance:**

Despite challenges, housing cooperatives continue to thrive, embodying values of affordability and community that address current housing demands and reshape living experiences.



Chapter 3

COOPERATIVE DOCUMENTS:

New Cooperative Board Member Course



Chapter 3
Cooperative Documents

The Foundation of
Cooperative Governance

Cooperative Governing Documents:

Overview of what topics were covered in chapter 3

Importance of Governing Documents:

These foundational documents empower boards, establish rights and responsibilities, ensure legal compliance, and create a framework for decision-making and operations within the cooperative.

Key Legal Documents:

Articles of Incorporation:

- Establishes the cooperative's identity, core purpose, governance structure, and powers and rights, linking it to state legality.

Bylaws:

- Operate as a dynamic rulebook detailing member rights and obligations, governance procedures, and policies, ensuring orderly functioning and adaptability as needs evolve.

Member Relationship Documents:

Subscription Agreement:

- Marks a member's commitment to the cooperative ethos and outlines roles, responsibilities, and rights, facilitating integration into the community.

Occupancy Agreement and Proprietary Lease:

- Define mutual rights and obligations, provide protocols for scenarios, and reinforce the cooperative's support for its members.

Agreements with External Agencies:

Mortgage Agreement:

- Governs financial arrangements with lenders, outlining loan terms and responsibilities to mitigate financial risks for the cooperative.

Regulatory Agreement:

- Ensures compliance with legal standards, facilitating interactions with regulatory bodies while promoting ethical conduct.

Governance and Management Tools:

Strategic Plan:

- Serves as the roadmap for the cooperative's future, aligning resources and goals while adapting to changes in the cooperative landscape

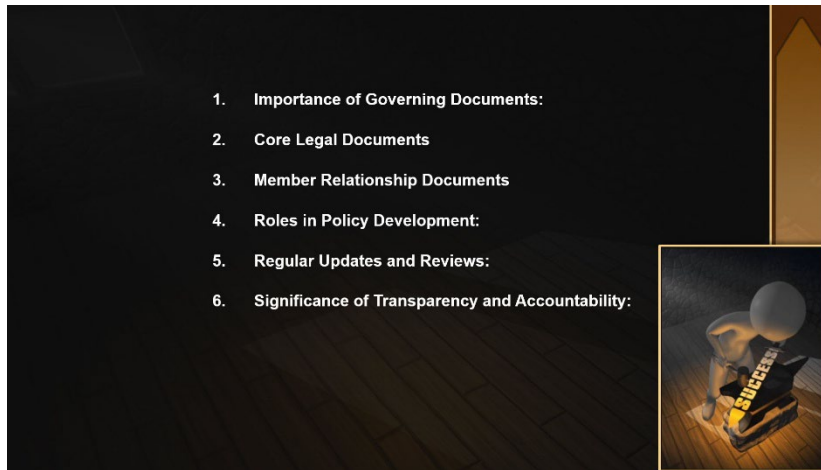
Board Policy and Procedures Manual:

- Outlines governance processes, providing structured guidance for decision-making and conflict resolution within the cooperative.

Conclusion:

The chapter emphasizes the significance of governing documents for ensuring structure, transparency, and alignment within cooperatives, promoting their functioning as equitable and harmonious communities.

Chapter 3 Review



1. Importance of Governing Documents:

Governing documents, including bylaws and articles of incorporation, are essential for defining the structure, rights, and responsibilities within a cooperative, ensuring legal compliance and continuity in governance.

2. Core Legal Documents:

The Articles of Incorporation establish the cooperative's identity and purpose, while the Bylaws serve as the operative rulebook guiding internal operations, member rights, and governance processes.

3. Member Relationship Documents:

Key documents, such as the Subscription and Occupancy Agreement, outline the cooperative's and its members' mutual rights and obligations, ensuring a clear understanding of expectations.

4. Roles in Policy Development:

The board plays a central role in adopting and reviewing governance documents, ensuring that policies align with the cooperative's mission and do not conflict with existing governing documents.

5. Regular Updates and Reviews:

Policies should be regularly reviewed and updated to remain relevant, reflecting laws and changes to community needs while ensuring they are easily accessible to all members.

6. Significance of Transparency and Accountability:

Maintaining clear and transparent documentation promotes trust within the community, ensuring that all members understand their rights and the cooperative operational guidelines.



Chapter 4

COOPERATIVE STRUCTURE

Cooperative New Board Training Class



Chapter 4: Cooperative Structures

Navigating the
Cooperative Landscape



Overview of what topics were covered in chapter 4

Introduction to Cooperative Structure:

Central Role of the Board:

- This chapter examines the intricacies of cooperative structure and highlights the pivotal role of the board in governance and leadership.

Responsibilities of Directors:

Establishment of the Cooperative:

- Board members uphold bylaws and policies, establishing the legal foundations of not-for-profit cooperatives.

Authority of the Board:

- Collective decision-making is central to board authority, with members carrying moral and legal responsibilities.

Commitment of Directors:

- Active participation, preparation, and representation of the board's unified perspectives are crucial for fulfilling the cooperative's mission.

Rights of Directors:

- Board members are entitled to receive notifications, access to records, and participate in governance, ensuring transparency.

Ethical Obligations:

- Directors must avoid conflicts of interest, refrain from competing personally, and maintain confidentiality to uphold the cooperative's integrity.

Legal Obligations of Directors:

Conflict of Interest Management:

- Directors must prioritize the cooperative's interests and disclose any potential conflicts.

Fiduciary Duty:

- As fiduciaries, board members are legally bound to act in the best interests of the cooperative, with potential legal consequences for breaches.

Maintaining Ethical Credibility:

- Participation, informed voting, and compliance strengthen the cooperative's reputation and public perception.
- **Confidentiality and Meeting Attendance:** Board members must safeguard confidential information and ensure informed decision-making through regular attendance.
- Authority of Directors:

Collective Authority:

- Decision-making is based on coordinated actions and resolutions by the board.

Orientation and Development:

- Ongoing training and access to resources are vital for enhancing governance skills among directors.

Document Maintenance:

- Properly storing critical organizational documents is crucial for maintaining operational readiness and preserving historical records.

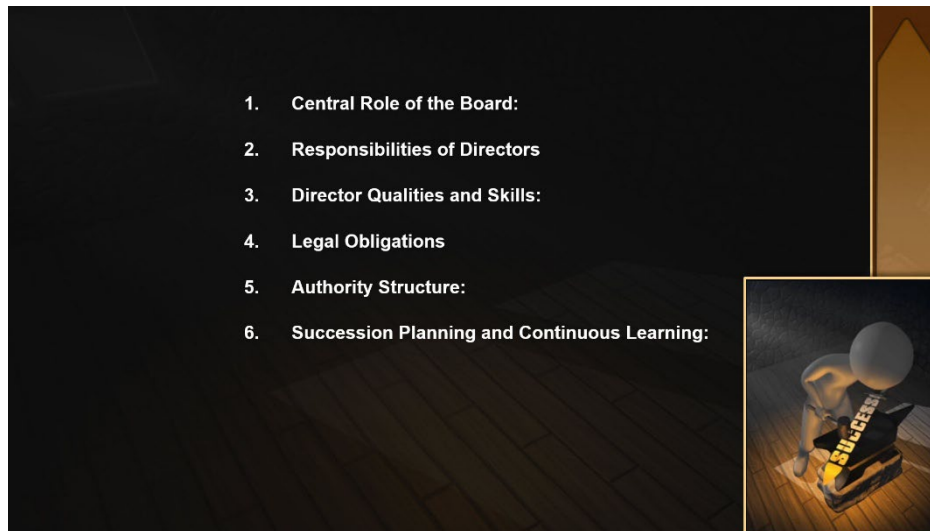
Perception and Sustainability:

- The board's image and diverse revenue streams are crucial for ensuring sustainability and mitigating risk.

Conclusion:

Chapter 4 detailed the structure and governance of cooperatives, highlighting the critical roles, ethical obligations, and collective authority of board directors, which contribute to effective leadership and fulfilling the cooperative's mission.

Chapter 4 Review



1. **Central Role of the Board:**

The Board of Directors plays a crucial role in shaping the cooperative's strategic direction and governance, ensuring the effective management of its operations.

2. **Responsibilities of Directors:**

Board members have diverse responsibilities, including establishing the cooperative's vision, overseeing financial health, monitoring performance, and ensuring accountability to the members.

3. **Director Qualities and Skills:**

Successful directors must possess qualities such as adaptive leadership, strategic vision, conflict resolution skills, and financial knowledge, which are essential for navigating the unique challenges of cooperative management.

4. **Legal Obligations:**

Directors must uphold fiduciary duties and adhere to legal standards, ensuring the cooperative operates ethically and complying with applicable laws.

5. **Authority Structure:**

Boards delegate operational authority to management while retaining oversight to ensure that decisions are made in the cooperative's and its members' best interest.

6. **Succession Planning and Continuous Learning:**

Boards should engage in ongoing training and succession planning to foster leadership continuity and enhance governance practices within the cooperative.



Chapter 5

Board of Directors

Cooperative New Board Training Course



Chapter 5
Board of Directors

Board of Directors as
the governing body

Overview of what topics were covered in chapter 5

Director's Overview:

Central Role of the Board:

- The Board of Directors governs the cooperative, overseeing strategic direction and operational effectiveness and having ultimate responsibility for all aspects of cooperative functions.

Director's Responsibilities:

Ethical Responsibilities:

- Directors must embody integrity, engage in community building, and advocate for sustainability within the cooperative.

Duty of Care:

- They must actively participate in meetings, enhance their knowledge of cooperative operations, and manage risks effectively.

Duty of Obedience:

- Directors ensure compliance with the governing documents and applicable laws, reinforcing the importance of adhering to policies and maintaining regulatory compliance.

Qualities of a Good Director:

Adaptive Leadership:

- Effective directors navigate change and foster innovation.

Strategic Vision:

- A clear vision facilitates the cooperative's alignment with its mission and objectives.

Conflict Resolution Skills:

- Directors must manage conflicts adeptly to maintain a cooperative and productive environment.

Cultural Sensitivity:

- Promoting inclusivity and diversity is crucial for enriching the cooperative community.

Financial Acumen:

- Understanding financial aspects is vital for maintaining the cooperative's health and sustainability.

Director's Role:

Leadership and Mentorship:

- Directors mentor emerging leaders and provide guidance.

Resource Mobilization:

- Engaging in resource acquisition is essential for growth.

Stakeholder Engagement:

- Building strong relationships with stakeholders enhances cooperation and collaboration.

Technology Adaptation:

- Embracing technology boosts efficiency and innovation in cooperative operations.

Legal Responsibilities of a Director:

Documentation & Record Keeping:

- Accurate records ensure transparency and accountability in board actions.

Data Protection:

- Protecting member information is critical for maintaining trust and privacy.

Fraud Prevention:

- Implementing safeguards against fraud is essential to upholding the cooperative's integrity.

Conclusion:

Serving on a cooperative board is a significant commitment that requires ethical leadership, strategic focus, and active engagement to promote the cooperative's mission and create a sustainable and resilient organization for the future.

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Chapter 5 Review



1. **Board of Directors: Central Role of the Board:**

The Board of Directors is crucial in overseeing the cooperative's strategic direction. It ensures effective governance by making informed decisions that align with the cooperative's mission and objectives.

2. **Responsibilities of Directors:**

Board members have a range of responsibilities, including creating a vision, developing strategic plans, formulating policies, managing finances, monitoring performance, and ensuring stakeholder engagement.

3. **Ethical Obligations and Duties:**

Directors are bound by fiduciary duties, including the duty of care and obedience, which require them to act in the best interests of the cooperative while adhering to established laws and governing documents.

4. **Qualities of Effective Directors:**

Successful directors demonstrate adaptive leadership, strategic vision, conflict resolution skills, cultural sensitivity, and financial acumen, all essential for effective governance.

5. **Importance of Interaction Between Board and Management:**

The board must provide clear direction and support to the management team, ensuring collaboration and alignment in executing the cooperative's operational plans.

6. **Continuous Learning and Self-Assessment:**

Boards should engage in ongoing training and performance evaluation to enhance governance practices, adapt to changing circumstances, and better support the cooperative's growth and sustainability.



Chapter 6

Officers of the Co-op

Cooperative New Board Training Course



Overview of what topics were covered in chapter 6

Director's Overview:

Importance of Cooperative Officers: Cooperative officers play a crucial role in ensuring the organization's smooth operation and are essential for effective governance.

President's Role:

Overseeing Operations:

- The president manages daily operations, ensuring compliance with rules and policies while facilitating efficient meetings and committee functions.

Acting as Spokesperson:

- Representing the board to stakeholders, handling inquiries, and maintaining diplomatic public relations.

Seeking Knowledge:

- Continuously learn about cooperative management to enhance leadership abilities.

Working with Volunteers:

- Encourages board member engagement and offers support to new members.

Collaborating with Professionals:

- Serves as a liaison with professional managers and advisors in legal, financial, or insurance matters.

Protecting the Co-op's Assets:

- Ensures responsible financial management and risk mitigation.

Vice President's Role:

Leading Meetings:

- Presides over meetings in the president's absence, requiring knowledge of parliamentary procedures.

Preparedness for Presidency:

- Prepare to assume presidential duties if necessary.

Committee Leadership:

- May lead key committees based on the cooperative's needs.

Liaison Role:

- Serves as a liaison between different entities, fostering communication and collaboration.

Secretary's Role:

Accurate Minutes:

- Records detailed minutes of meetings, documenting actions, voting records, and decision authority.

Meeting Announcements:

- Responsible for announcing meetings and preparing agendas by governing documents.

Record Maintenance:

- Manages an organized filing system and ensures compliance with retention schedules.

Witnessing and Verifying Signatures:

- Ensures authenticity in signatures for various documents.

Accepting and Verifying Proxies:

- Maintain integrity in meetings by verifying proxies.

Correspondence Management:

- Handles cooperative correspondence professionally.

Treasurer's Role:

Budget Preparation:

- Collaborate with the board and committees to develop a budget that aligns with financial goals.

Financial Account Maintenance:

- Oversee insurance, financial records, investments, and tax compliance.

Financial Statements:

- Analyze the cooperative's financial statements to assess its economic health.

Board Reporting:

- Regularly reports to the board on financial status and performance.

Reserve Program Management:

- Assesses future capital needs and manages funding programs.

CPA Selection and Audit Conduct:

- Ensures annual audits are performed transparently and oversees CPA engagement.

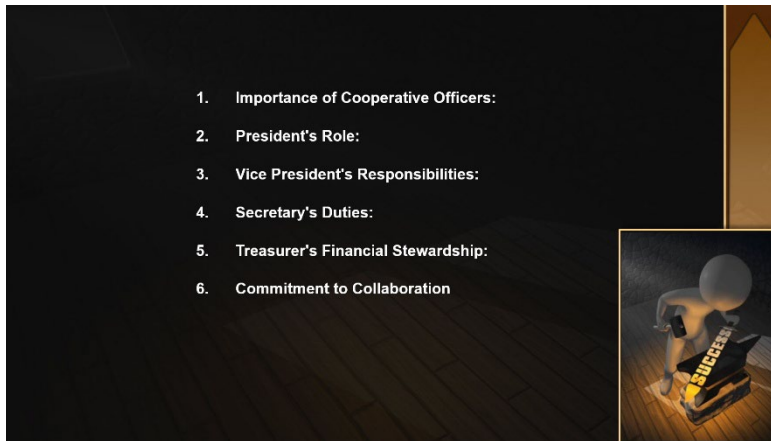
Bookkeeping Oversight:

- Maybe involved in bookkeeping tasks for self-managed communities.

Conclusion:

Serving as a cooperative officer involves significant responsibility and dedication. Officers must foster ethical leadership, effective governance, and active engagement to promote a resilient and sustainable cooperative environment.

Chapter 6 Review



1. **Importance of Cooperative Officers:**

Cooperative officers, including the president, vice president, secretary, and treasurer, play vital roles in managing and guiding the cooperative's operations, ensuring effective governance.

2. **President's Role:**

The president oversees daily operations, acts as the spokesperson for the board, communicates the cooperative's mission, and manages relationships with professionals and volunteers.

3. **Vice President's Responsibilities:**

The vice president supports the president by leading meetings in their absence, preparing for potential transition into the presidency, and often taking charge of central committees.

4. **Secretary's Duties:**

The secretary plays a crucial role in record-keeping by ensuring the accuracy of meeting minutes, managing correspondence, and maintaining official documents, all of which are essential for transparency and effective governance.

5. **Treasurer's Financial Stewardship:**

The treasurer oversees the cooperative's financial health, manages budgeting processes, provides financial reporting, ensures compliance with regulations, and monitors reserve funds.

6. **Commitment to Collaboration:**

Each officer must work collaboratively with the board and management, demonstrating effective leadership and accountability to foster a positive and well-functioning cooperative environment.



Chapter 7

Director Leadership

Cooperative New Board Training Course



Chapter 7 Director's Leadership



Overview of what topics were covered in chapter 7

Leadership Overview:

Collaboration and Commitment:

- Board leadership involves inspiring and working collaboratively towards a shared vision, focusing on stewardship over personal recognition.

Vision and Mission:

- Directors are custodians of the organization's vision and mission, ensuring these guiding principles remain integral to decision-making.

Shared Values:

- A collective sense of values fosters a unified culture that guides the board's interactions and decisions.

Organizational Knowledge:

- Understanding the cooperative's core purpose and community impact is vital for effective leadership.

Governance Capacity:

- Continuous improvement of governance skills and awareness of best practices is essential for effective board functioning.

Financial Literacy:

- Knowledge of financial conditions and sustainability enables informed financial decision-making.

Service Commitments:

- Board members must focus on fulfilling the organization's commitments to service and advocacy.

Strategic Planning:

- Participation in strategic planning ensures that the organization remains adaptable to external changes.

Director Stewardship:

Fiduciary Responsibility:

- Upholding accountability and avoiding self-interest are critical to an organization's health.

Code of Conduct:

- Establishing clear behavior guidelines reinforces professionalism and confidentiality among board members.

Conflict of Interest:

- Policies must be in place to prevent personal exploitation of board positions.

Code of Ethics:

- A guiding code of ethics ensures alignment with the organization's mission and ethical principles.

Directors Cultivating:

Diversity and Inclusion:

- Emphasizing equity and inclusion enhances membership and service delivery, removing barriers to participation.

Unlawful Harassment:

- Creating a discrimination-free environment with policies against harassment is essential.

Misconduct Protocols:

- Mechanisms must exist to address allegations of misconduct while protecting whistleblowers.

Organizational Traditions:

Participation in Orientations:

- Attendance at board orientations and retreats strengthens connections and fosters alignment.

Support for Advocacy:

- Active involvement in advocacy efforts demonstrates commitment to the organization's mission.

Member Engagement:

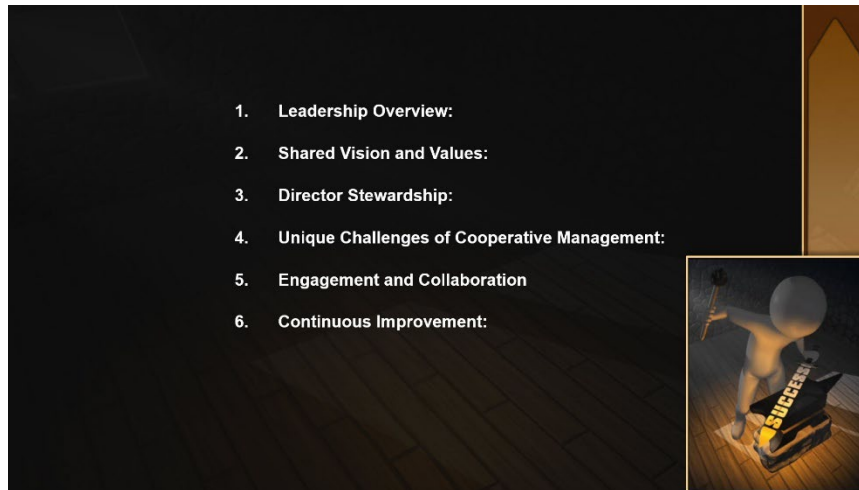
- Open communication and input from members help nurture community relevance.

Conclusion:

Multifaceted Role: Board leadership in a not-for-profit organization is multidimensional, involving inspiration, collaboration, and ethical stewardship.

Impact on Success: By cultivating leadership qualities, adhering to ethical principles, promoting diversity, and maintaining traditions, board members can guide their organizations to enhance societal impact.

Chapter 7 Review



1. **Leadership Overview:**

Board members serve as leaders who inspire collaboration and commitment by aligning the cooperative's activities with its mission and strategic goals, ensuring effective governance.

2. **Shared Vision and Values:**

Directors must understand and actively promote the cooperative's mission, vision, and values, facilitating a unified culture and guiding decision-making processes.

3. **Director Stewardship:**

Directors hold fiduciary responsibilities, which require them to prioritize the cooperative's interests over their agendas and ensure transparency, accountability, and ethical conduct.

4. **Unique Challenges of Cooperative Management:**

Cooperative directors must navigate the complexities of providing equitable treatment to member-owners, striking a balance between business decisions and the diverse needs of the cooperative membership.

5. **Engagement and Collaboration:**

Directors should actively engage with members, involving them in decision-making while fostering a supportive community atmosphere that encourages participation and input.

6. **Continuous Improvement:**

Developing skills through training, self-assessment, and planning for leadership succession are essential for enhancing governance practices and ensuring that the board remains effective and responsive to changing community needs.



Chapter 8

The Power of Strategic Planning

Cooperative New Board Training



Chapter 8:
Strategic Planning

Overview of what topics were covered in chapter 8

Compass for Direction:

- A strategic plan provides a clear path for the cooperative over the next three to five years, guiding the organization and ensuring it remains focused on its objectives.

Consistency Amid Change:

- It ensures stability during leadership transitions, preventing drastic shifts in direction.

Alignment for All:

- Keeps committees and volunteers working towards common objectives, fostering unity.

Budget Planning Aid:

- Acts as a financial guide to help allocate necessary resources to achieve goals.

Resource Allocation:

- Facilitates wise allocation of resources throughout the year to support strategic initiatives.

Building Awareness:

- Raise awareness about the cooperative and its importance within the industry and community.

Crafting Your Strategic Plan:

Board Retreat:

- The planning process starts with a board retreat to foster productive discussions.

Setting the Scene:

- The president and executive director will lead the effort to create a comfortable atmosphere that facilitates open dialogue.

Common Terms:

- Ensure clarity on key concepts, such as goals and mission.

Review Past Reports:

- Assess previous plans to evaluate past achievements and pending tasks.

SWOT Analysis:

- Analyze internal strengths, weaknesses, external opportunities, and threats.

Refining Brand Platform:

- Revisit and possibly adapt mission, vision, and value statements.

Setting Clear Goals:

- Establish 3-5 clear goal statements to align resources with the mission.

Identifying Strategies:

- Identify the programs and projects necessary to achieve the established goals.

Performance Metrics:

- Create performance metrics to ensure accountability in achieving goals.

Strategic Planning Roles:

Plan Champion:

- The Chief Elected Officer oversees the progress of the strategic plan and monitors key indicators.

Goal Champion:

- Designated leaders, including volunteers and staff, are responsible for the success of each goal.

Task Owner:

- Specific actions within strategies are assigned to task owners for completion and to track progress.

Guiding Principles:

Core Values:

- Principles such as community, inclusion, leadership, growth, and celebration should inform discussions and decisions.

Governance Roadmap:

- The strategic plan guides the board's actions, while bylaws provide structural support.

Rising Tide Philosophy:

- Improving operations benefits the entire cooperative.

Continuous Improvement Programs:

- Essential training and improvement initiatives should be offered to all organization chapters.

Structural Consideration:

- Review the organizational structure for effectiveness and alignment with goals.

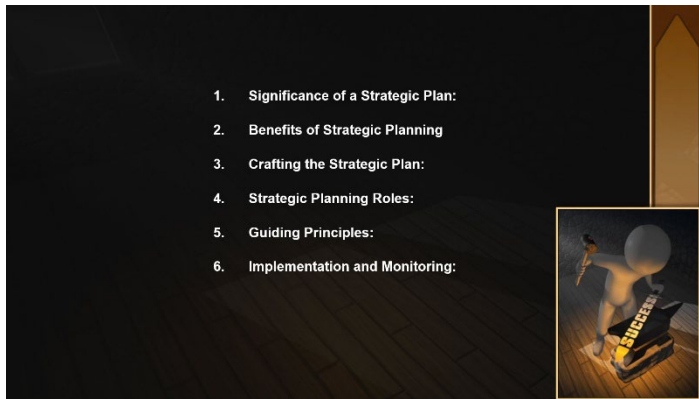
Strategic Action:

- Always act strategically based on a multi-year plan that communicates organizational priorities.
-

Conclusion:

Translating the strategic plan into actionable steps is key to achieving goals. Utilizing dashboards and other tools can help to keep the plan visible and central to ongoing efforts, allowing the cooperative to monitor progress effectively.

Chapter 8 Review



1. **Significance of a Strategic Plan:**

A strategic plan serves as a roadmap for the cooperative, providing direction for the next 3-5 years, ensuring continuity during leadership transitions, and aligning all members toward common objectives.

2. **Benefits of Strategic Planning:**

Effective strategic planning facilitates resource allocation, budgeting, and building awareness about cooperation while fostering unity among committees and volunteers by ensuring everyone works towards shared goals.

3. **Crafting the Strategic Plan:**

The process begins with a board retreat, which includes reviewing past reports, conducting SWOT analysis, refining the cooperative's mission and values, and establishing clear goals and strategies to reach those goals.

4. **Strategic Planning Roles:**

Key roles in the planning process include the Plan Champion (usually the Chief Elected Officer), Goal Champions (volunteers or staff leading specific goals), and Task Owners (responsible for implementing actions within the strategies).

5. **Guiding Principles:**

The strategic plan should reflect core values such as community, inclusion, and growth. It should serve as a governance roadmap while encouraging continuous improvement and adaptability within the cooperative.

6. **Implementation and Monitoring:**

Successful execution of the strategic plan involves regularly assessing progress against established performance metrics, maintaining transparency, and ensuring that the plan remains relevant and aligned with the cooperative's objectives.



Chapter 9

Navigating Directors' Governance

Cooperative New Board Training Course



Chapter 9:
Governance

Navigating Directors' Governance

Overview of what topics were covered in chapter 9

Governance Unveiled:

Role of Governance:

- Governance acts like the rudder of a ship, ensuring the organization stays on course through adherence to governing documents (bylaws, articles, policies) and alignment with the mission and strategic plan.

Board Responsibilities: Creating Vision:

- Crafting an inspiring vision that aligns with the mission, setting long-term goals, and providing direction.

Strategic Planning:

- Identifying strategic goals, assessing the organization's environment, and measuring progress.

Policy Development:

- Establishing financial management, risk, ethics, and governance guidelines to ensure consistency.

Resource Allocation:

- Overseeing the allocation of resources—financial and otherwise—to achieve the mission.

Performance Monitoring:

- Evaluating progress towards goals using relevant metrics and data to inform decisions.

Stakeholder Engagement:

- Act as a bridge between the organization and its stakeholders, fostering effective communication.

Risk Oversight:

- Identifying and implementing strategies to manage risks.

The Heart of Governance: Mission and Vision:

Significance of Mission and Vision:

- The board guides the organization's mission, values, and purpose, crucial for effective leadership and performance.

Governance: More Governing, Less Managing:

Balanced Focus:

- Directors should concentrate on strategic governance rather than day-to-day management to avoid undermining effectiveness.

Partnership with Staff:

- Effective governance requires collaboration based on trust and communication between the board and staff.

Verification and Trust:

- Trust management fosters transparency, using accurate reports and audits as verification tools.

Enhancing Governance:

Board Self-Assessment:

- Regular board performance evaluations can enhance communication, decision-making, and effectiveness.

Training and Development:

- Ongoing training informs board members about trends, regulations, and best practices.

Succession Planning:

- Planning for leadership continuity ensures that new members are effectively mentored and integrated.

Stakeholder Engagement:

- Involving stakeholder feedback in decisions is essential for responsiveness.

Monitoring and Evaluation:

- Regular assessments help ensure governance practices remain practical and relevant.

The Gospel of Good Governance:

Core Principles:

Trust and Trustworthiness:

- Building an effective board relies on transparency, respect, and integrity.

Balanced Partnership:

- Collaboration between the board and staff is crucial for success.

Oversight and Governance:

- Directors govern while staff members manage daily operations.

Strategy and Policy:

- Focus on strategic discussions and developing effective policies.

Continuous Learning:

- Boards should be kept informed about the best practices and emerging trends.

Verifiable and Measurable:

- Governance practices should be quantified for continuous improvement.

Efficiency and Effectiveness:

- Meetings should be meaningful with results-oriented agendas.

Member-Centric Approach:

- Prioritize the interests of serving members over personal agendas.

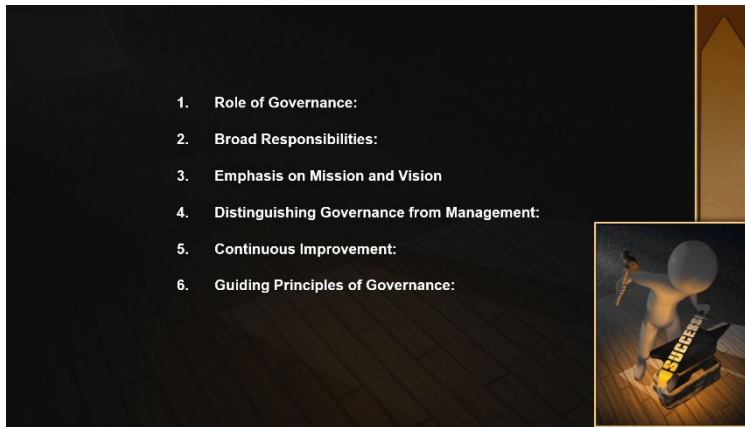
Brevity:

- Clear and concise communication enhances effectiveness.

Conclusion:

Effective governance is a journey of continuous improvement and collaboration. By following guiding principles and focusing on the mission, boards can strategically steer their organizations toward success.

Chapter 9 Review



1. **Role of Governance:**

Governance acts as the guiding force for a cooperative, ensuring that decisions align with the cooperative's mission and values while adhering to legal and ethical standards. The board holds the primary responsibility for governance.

2. **Broad Responsibilities:**

The board's responsibilities encompass creating a vision, strategic planning, policy development, resource allocation, performance monitoring, stakeholder engagement, and risk oversight, all aiming to steer cooperatives toward their objectives.

3. **Emphasis on Mission and Vision:**

The board plays a crucial role in ensuring that the cooperative's mission and vision statements remain relevant and are effectively communicated throughout the organization, fostering a sense of purpose among members.

4. **Distinguishing Governance from Management:**

Effective governance involves striking a balance by focusing on strategic governance rather than micromanagement. Staff is allowed to handle daily operations while the board oversees broader goals.

5. **Continuous Improvement:**

Governance is an evolving process, and boards should regularly assess their effectiveness, invest in training opportunities, and engage with stakeholders to enhance responsiveness and adapt to changing conditions.

6. **Guiding Principles of Governance:**

Good governance is characterized by trustworthiness, transparency, balanced partnerships between the board and management, prioritization of strategy and policy, accountability, and a member-centric approach that focuses on serving the interests of the cooperative's members.



Chapter 10

Policies for Directors



Chapter 10: Board Policies

Crafting Effective Policies



Overview of what topics were covered in chapter 10

The Purpose of Policy:

Guidance Role:

- Policies interpret broader governing documents, reflecting historical decisions made by previous boards while ensuring continuity during leadership transitions.

Protection:

- They defend the board by demonstrating care and due diligence in decision-making.

Clarity and Authority:

- Policies guide committees regarding their authority, preventing assumptions and clarifying actions.

Policies vs. Procedures:

- Policies are high-level documents that guide actions, while procedures detail the administrative steps to implement these policies. Understanding this distinction is crucial for boards.

Creating a Policy:

Rebuild Policies:

- Policies can be reconstructed from board meeting minutes by identifying motions over the past five years and compiling them into a manual.

Drafting Process: Identify Issues:

- Recognize repetitive discussions that indicate the need for a policy.

Review Governing Documents:

- Ensure new policies align with the organization's bylaws and articles of incorporation, avoiding conflicts.

Environmental Scan:

- Research how similar organizations tackle issues and review sample policies.

Draft Policy:

- Develop clear and concise policies in collaboration with relevant stakeholders, including legal and financial advisors.

Board Adoption:

- Policies must be formally adopted through a board motion and recorded in the minutes.

Update and Distribute:

- Maintain an accessible policies manual and ensure all stakeholders are aware of them

Common Policies:

Antitrust Avoidance:

- Necessary to prevent legal issues related to competitive practices and ensure compliance with laws.

Savings Reserve:

- Maintain a financial reserve equivalent to six months of annual budgeted income to ensure stability in unforeseen circumstances.

Insurance Coverages:

- Ensure effective risk management through various insurance policies, including general liability and directors' and officers' (D&O) coverage.

Financial Audit:

- Conduct annual audits through an independent CPA to ensure financial integrity and transparency.

Record Retention:

- Establish a retention schedule for documents based on legal advice to ensure the preservation of historical records.

Meeting Minutes:

- Accurately document board meetings, reflecting actions and distributing minutes within 30 days.

CEO Performance Evaluation:

- Implement a periodic evaluation process for the executive director, maintaining confidentiality.

Consent Agenda:

- Use consent agendas for routine items to streamline the meeting process while allowing removal for discussion if necessary.

Executive Session Guidelines:

- Set clear parameters for discussions during executive sessions, reserving specific topics for staff.

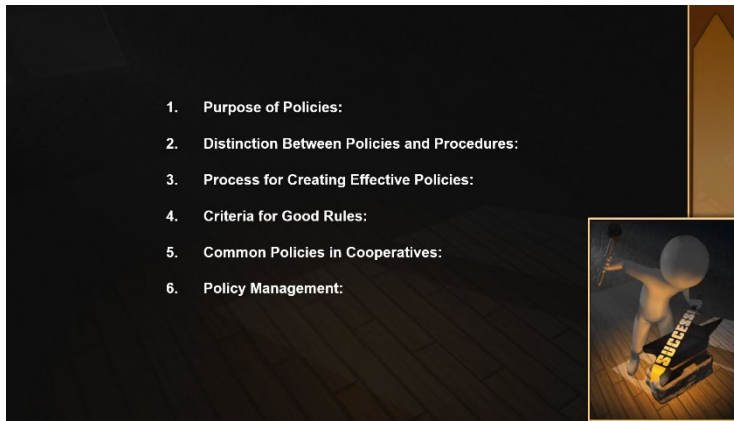
Liquor Service Policy:

- Develop responsible service guidelines for events where alcohol is served.

Conclusion:

Effective policies are crucial for guiding an organization toward its objectives, ensuring transparency, consistency, and adherence to legal requirements. Organizations can confidently navigate governance complexities by adopting relevant policies and following best practices.

Chapter 10 Review



1. **Purpose of Policies:**

Policies serve as essential guidelines for cooperative operations. They help interpret broader governing documents, such as bylaws and mission statements, ensure continuity in governance, and protect the organization's integrity.

2. **Distinction Between Policies and Procedures:**

Policies are high-level guidelines that govern behavior and decision-making, while procedures are specific administrative steps that outline how to implement those policies. Understanding this distinction is crucial for effective governance.

3. **Process for Creating Effective Policies:**

The process involves identifying the need for a policy, assessing existing solutions, drafting clear and actionable rules, communicating transparently with members, and ensuring consistent enforcement while allowing member feedback.

4. **Criteria for Good Rules:**

Effective policies should be legal, necessary, reasonable, clear, and enforceable. These characteristics ensure that policies serve their intended purpose without causing confusion or unfair treatment among members.

5. **Common Policies in Cooperatives:**

Important policies may include antitrust avoidance, financial audits, reserve funds, insurance coverage, record retention, and guidelines for member behavior. These policies are essential in supporting the cooperative's operations and protecting member interests.

6. **Policy Management:**

Once policies are adopted, they require ongoing maintenance. This includes regular reviews, ensuring they are accessible, documenting changes, and educating members about their responsibilities under these policies to promote compliance and understanding.



Chapter 11

Cooperative Rules:

Cooperative New Board Training Course



Chapter 11 Cooperative Rules

Overview of what topics were covered in chapter 11

Rule Creation:

Importance of Rules:

- Rules are essential for maintaining the well-being and harmony of a cooperative community, serving the following purposes:

Preserving Aesthetics:

- Guidelines on property maintenance and landscaping ensure a visually appealing appearance.

Protecting Property Values:

- Effective rules help maintain property values by preventing neglect and ensuring a cohesive appearance.

Enforcing Governance Documents:

- Rules provide clear guidelines that align with governing documents, such as CC&Rs and Bylaws.

Maintaining Property:

- Rules govern the usage and maintenance of common areas and shared facilities.

Reviewing Current Rules:

- Assess existing rules to identify problems, determine the authority to create new regulations, and evaluate existing solutions within governing documents.

Process for Creating Good Rules:

Future Consideration:

- Consider both the short-term and long-term implications when drafting new rules.

Drafting:

- Clearly outline desired behaviors, enforcement processes, and penalties for non-compliance.

Communication:

- Ensure transparency by informing residents about the need for new rules and collecting feedback.

Acting:

- After receiving feedback, decide on proposed rules and notify residents before enforcement.

Enact and Enforce:

- Ensure consistent enforcement by all residents to maintain equity.

Effective Rules and Regulations:

Criteria for Good Rules:

Legality:

- Must align with laws and governing documents.

Necessity:

- Should address genuine community issues.

Effectiveness:

- Help achieve community goals.

Reasonableness:

- Fair and reasonable for all residents.

Clarity:

- Easy to understand and enforce, with outlined penalties.

Enforceability:

- Must be consistently applied.

Creating Clear Rules:

- Start with a clear purpose and ensure the proposed penalties are fair.
- Communicate rules through various channels and ensure ongoing education for residents.
- Regularly review rules to identify outdated or unnecessary regulations.
- Formalizing Cooperative Rules and Regulations:

Consult Experts:

- Engage with property management and legal advisers before formalizing policies.

Step-by-step approach:

- Follow established protocols for implementing new rules and policies.

Committee Formation:

- Involve committees in investigating the need for rules and collecting resident input.

Strategies for Voluntary Compliance:**Address Issues Directly:**

- Identify behaviors that need correction and explain their impact.

Explain Intentions:

- Clarify the board's authority to improve understanding of the rules.

Engage Residents:

- Soliciting feedback and input during the rule-making process.

Give Notice:

- Provide advance notice of new rules with time for resident responses.

Consistent Communication: Keep residents informed about regulations and updates regularly.

- Rule Enforcement Process:

Educate Residents:

- Provide orientation materials to ensure a clear understanding of the house rules.

Support Staff:

- Ensure that the staff feels supported in consistently enforcing rules.

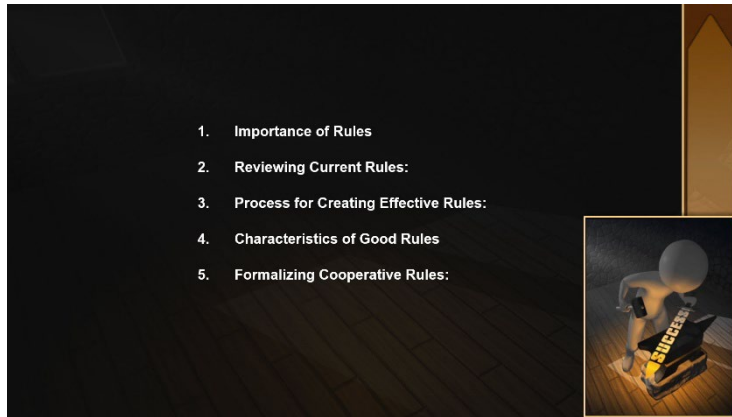
Transparent Enforcement:

- Clearly define the enforcement process and ensure residents understand it.

Conclusion:

Cooperative rules are foundational to a harmonious community and require a systematic approach, clear communication, and consistent enforcement. Cooperative communities protect residents' investments and thrive by fostering voluntary compliance and regularly updating rules.

Chapter 11 Review



Importance of Rules:

Rules are fundamental to the stability and harmony of a cooperative community. They help preserve aesthetics, protect property values, enforce governing documents, and maintain common areas, ensuring a well-functioning environment.

Reviewing Current Rules:

Before establishing new rules, it's crucial to assess existing regulations, identify current problems within the community, determine if these issues are already addressed elsewhere, and confirm the authority to enact new rules.

Process for Creating Effective Rules:

Creating effective rules involves careful planning, including consideration of long-term implications, drafting clear guidelines, communicating transparently with members, gathering feedback, notifying residents before enforcement, and ensuring the consistent application of rules.

Characteristics of Good Rules:

Effective rules must be legal, necessary, effective, reasonable, clear, and enforceable. This ensures they serve a legitimate purpose without resulting in confusion or unfairness within the community.

Formalizing Cooperative Rules:

Establishing strong rules requires consulting experts, setting clear procedures for implementation, involving community members in the discussion, and maintaining an ongoing review process to adapt to changing circumstances.

Strategies for Voluntary Compliance:

Encouraging residents to follow rules voluntarily involves direct communication about problematic behaviors, explaining the intentions behind rules, gathering resident input before finalizing decisions, and providing clear communication about any changes.



Chapter 12

Navigating Finances

Cooperative New Board Training Course



Chapter 12 Cooperative Finances



Overview of what topics were covered in chapter 12

Financial Management:

Importance of Finances:

- Managing finances is crucial for shaping the future of the cooperative community.

Protecting Assets:

- Implement prudent financial policies to safeguard cash assets through checks and balances.

Securing Property:

- Adequate insurance coverage acts as protection for the community's physical assets.

Smart Risk Management:

- Develop effective risk management policies to minimize potential financial issues.

Income Protection:

- Consistent collection policies help ensure the community's income is reliable.

Liability Defense:

- Informed decision-making protects against legal liabilities.

Preventing Waste:

- Oversight helps prevent financial mismanagement and corruption.

Property Maintenance:

- Regular maintenance is essential for preserving property value.

Budgeting as a Creative Art:

Objective Approach:

- Use historical data to inform budgeting decisions, avoiding assumptions.

Expense Realism:

- Be realistic about expenses to ensure adequate funding for contingencies.

Inclusive Budgeting:

- Include all potential costs in the budget to prevent surprises.

Income Projection:

- Account for expected delays in resident payments to manage cash flow effectively.

Long-Term Vision:

- Implement multi-year budgets for better financial planning.

Finance Reserves:

Importance of Reserves: Reserves act as the financial safety net for the community.

Reserve Specialists:

- Engage experts to conduct reserve studies and assess replacement timelines for community components.

Updated Treasure Maps:

- Regularly update reserves to reflect changing conditions and costs.

Investing Wisely:

- Protect reserves while maximizing returns; investment strategies should align with the community's goals.

Avoiding Surprise Expenses:

- Maintain reserves to manage unexpected costs without needing to borrow.

Reserve Fund Setup: The Journey Begins**Owner Buy-In:**

- Educate owners about the importance of reserves in securing support.

Specifying Components:

- Identify common areas and their replacement needs for more effective financial planning.

Funding Strategies:

- Select a funding strategy that aligns with the association's goals.

Frequency of Studies:

- Regularly review reserve studies to keep financial plans accurate.

Use Studies for Education:

- Share findings from reserve studies with owners to foster understanding and transparency.

Investment Wisdom: Your Financial Advisors**Written Investment Policy:**

- Create a clear investment policy to guide consistent decision-making.

Balance Safety, Liquidity, and Yield:

- Ensure investments align with the community's financial objectives, considering safety and risk.

Defining Reserve Fund Use:**Repair and Replace:**

- Reserves should primarily fund the repair and replacement of existing community elements.

Covering Unexpected Costs:

- Use reserves for unforeseen expenses, reserving funding for new projects only as specified.

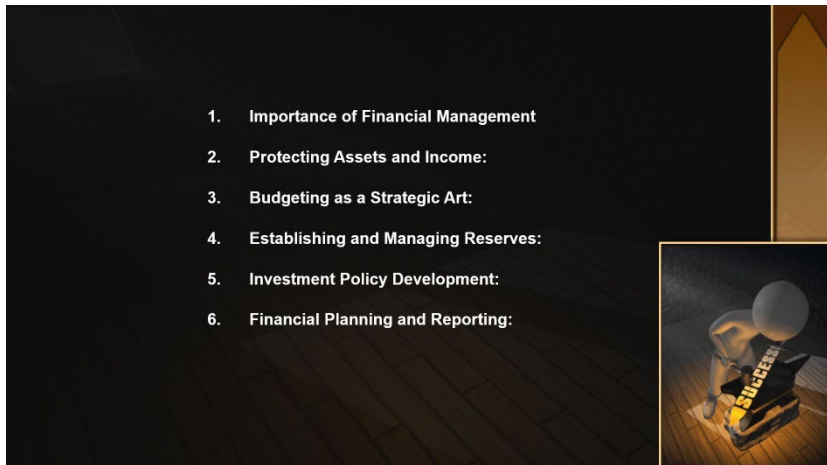
Proper Funding:

- Calculate and plan for adequate reserve funding to prevent financial instability.

Conclusion: Financial Mastery for Community Prosperity

Financial management is pivotal for the cooperative's success. Board members are crucial in guiding the organization's economic health, embracing challenges, and creating a legacy for the community.

Chapter 12 Review



1. **Importance of Financial Management:**

Effective financial management is crucial for ensuring the cooperative's economic health and stability, protecting assets, and securing the community's future through prudent policies and oversight.

2. **Protecting Assets and Income:**

The board should implement checks and balances to protect cash assets and maintain proper property insurance coverage. Additionally, consistent income collection policies are necessary to ensure financial stability.

3. **Budgeting as a Strategic Art:**

Budgeting should be approached methodically, combining historical data with realistic projections. This ensures that all costs, including taxes and potential late payments, are accounted for to create a comprehensive and effective financial plan.

4. **Establishing and Managing Reserves:**

Reserve funds act as a financial safety net for the community, allowing unexpected expenses to be addressed without borrowing. Regularly updated reserve studies and a clear funding strategy are vital for managing these funds effectively.

5. **Investment Policy Development:**

A written investment policy should guide the cooperative's investment decisions, striking a balance between safety, liquidity, and yield that aligns with the community's financial objectives and risk tolerance.

6. **Financial Planning and Reporting:**

The management team should provide the board with accurate financial reports, ensure regulation compliance, and establish robust internal controls. Continuous financial analysis is crucial for maintaining the cooperative's alignment with its goals.



Chapter 13

Working with Professionals

A composite image featuring a portrait of a man with dark hair and a beard, wearing a white button-down shirt, on the left. On the right, there is a circular logo for Berendson Academy. The logo has a green graduation cap icon at the top, with the text "Berendson Academy" below it, and "An Excellence Recognized By The Cooperative Industry" at the bottom. The entire graphic is set against a dark background with a faint chalkboard texture.

**Chapter 13:
Professional Roles**

Overview of what topics were covered in chapter 13

The Attorney: Guiding Your Legal Journey

Choosing the Right Legal Expert:

- Selecting an attorney experienced in community association law is crucial for addressing specific legal needs and challenges.

Fostering Collaboration:

- Establishing a productive relationship between the association manager and the attorney ensures effective communication and reduces misunderstandings.

Legal Support Services:

Reviewing Documents:

- Attorneys review governing documents and contracts to ensure compliance with applicable laws.

Providing Legal Opinions:

- Offer advice on the legal implications of board decisions to ensure informed governance.

Educating Residents:

- Attend meetings to help stakeholders understand their rights and obligations.

Collecting Delinquent Assessments:

- Manage financial matters related to assessment collections and legal action if necessary.

Enforcing Deed Restrictions:

- Help maintain community standards by enforcing existing restrictions.

Litigating:

- Represent the association in legal matters to protect its interests.

The Certified Public Accountant: Mastering Financial Health

Understanding Their Role:

- CPAs differ from bookkeepers because they bring advanced financial expertise crucial for budgeting, auditing, and financial reporting.

Financial Services:

Providing Written Reports:

- Conducted financial audits and created reports to ensure accurate financial oversight.

Developing Policies:

- Assist in establishing accounting policies and procedures.

Consulting and Advising:

- Offer educational support to board members on financial matters, strategies, and long-term planning.

The Insurance Agent: Safeguarding Your Community

Expertise in Community Associations:

- Insurance agents with specialized knowledge help assess and protect community associations against unique risks.

Role and Responsibilities:

Reviewing Association Documents:

- Advise on minimum insurance requirements based on governing documents.

Identifying Risks:

- Inspect the community to identify potential risks needing coverage.

Verifying Property Values:

- Ensure accurate valuations for insurance purposes.

Educating Residents:

- Clarify the association's coverage to homeowners, establishing clear responsibilities.

Assisting with Claims Procedures:

- Helped outline claims processes to facilitate the seamless handling of incidents and claims.

The Reserve Specialist: Preserving Your Assets

Hiring the Right Expert:

- Reserve specialists provide critical insights into the financial health of community assets through comprehensive reserve studies.

Key Functions:

Detailed Reserve Studies:

- These provide a roadmap for managing and forecasting future expenses related to community assets.

Cost Considerations:

- I acknowledge that costs can vary based on the complexity of the community.

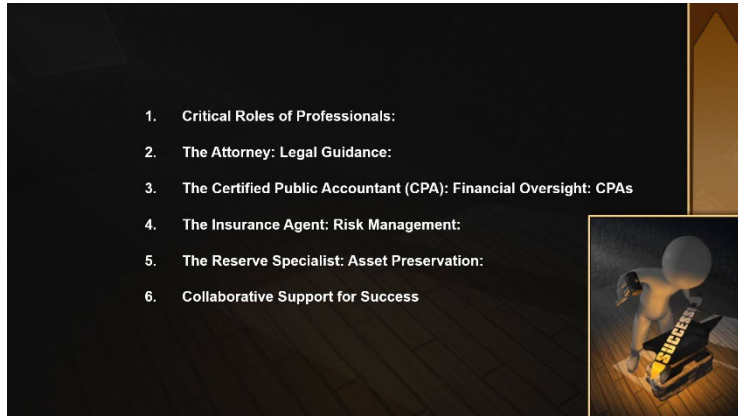
Selecting Contractors:

- Maintain ethical standards during contractor selection to avoid conflicts of interest.

Conclusion: Building Strong Foundations

Professionals such as attorneys, CPAs, insurance agents, and reserve specialists are essential for community associations' success. Associations can achieve legal compliance, financial stability, and harmonious living environments by leveraging their expertise.

Chapter 13 Review



1. **Critical Roles of Professionals:**

Professionals, such as attorneys, CPAs, insurance agents, and reserve specialists, provide essential expertise and guidance to strengthen community associations' operations and governance.

2. **The Attorney: Legal Guidance:**

Attorneys specializing in community association law help ensure compliance with governing documents and state regulations. They assist in reviewing contracts, providing legal opinions, educating members, collecting delinquent assessments, and enforcing deed restrictions.

3. **The Certified Public Accountant (CPA): Financial Oversight:**

CPAs bring financial expertise beyond day-to-day bookkeeping, conducting audits, preparing financial reports, developing policies, and providing training on financial matters to ensure the cooperative's economic health and transparency.

4. **The Insurance Agent: Risk Management:**

Insurance agents with knowledge of community associations help identify coverage needs, ensure proper property valuation, and educate members on their insurance responsibilities. They also assist in claims procedures and develop risk management programs.

5. **The Reserve Specialist: Asset Preservation:**

Reserve specialists conduct detailed reserve studies to guide financial planning for maintaining and replacing community assets. Their expertise helps cooperatives effectively plan for future expenses.

6. **Collaborative Support for Success:**

By fostering strong partnerships with these professionals, cooperatives can enhance operational efficiency, ensure legal compliance, strengthen financial health, and improve the overall quality of community living.



Chapter 14

Management

Cooperative New Board Training Class



Chapter 14 Management

A Pillar of Cooperative Success



Overview of what topics were covered in chapter 14

Management Overview:

Importance of Effective Management:

- Effective management is crucial for the success of housing cooperatives. It translates the board's decisions into daily operations and meets the cooperative's objectives.

Collaboration Between Board and Management:

- A successful partnership enhances communication and performance, allowing management to implement operational plans and oversee functions effectively.

Key Aspects of Effective Management:

Providing Clear Direction:

- The board must communicate its mission, vision, and strategic goals to management to ensure the alignment of activities.

Hiring and Supporting the Chief Executive:

- The board recruits and supports the CEO or executive director, who is crucial for implementing decisions and guiding the organization.

Performance Monitoring:

- Establishing performance indicators allows the board to assess progress and provide oversight.

Financial Management:

- Management is responsible for budgeting and fiscal stewardship, with the board overseeing financial reports to protect the cooperative's health.

Staff Development:

- Effective recruitment, retention, and training policies support the growth and performance of the management team.

Stakeholder Relationships:

- Management must maintain positive relationships with stakeholders, and the board must ensure management has the resources to engage effectively.

Risk Management:

- Ongoing identification and mitigation of risks are essential; the board guides these practices.

Management Role:

Unique Dimensions of Cooperative Management:

- Cooperative managers must prioritize member-owners' needs over traditional business practices and emphasize equitable treatment among owner-patrons.

Core Resources:

- Successful management requires effective oversight of people, capital, and facilities.

People:

- Focus on personnel management, including recruitment, training, and professional development.

Capital:

- Manage finances to ensure the cooperative's goals are met.

Facilities:

- Oversee the maintenance and compliance of cooperative assets.

Management Functions:**Planning:**

- Set clear objectives aligning with cooperative goals.

Organizing:

- Structure activities and responsibilities to achieve objectives.

Motivating:

- Encourage and communicate effectively with staff and members.

Controlling:

- Monitor progress and make necessary adjustments to stay on track.

The Selection Process:**Choosing the Right Management:**

- Board members must select experienced professionals or management companies with a proven track record in cooperative management.

Factors to Consider:**Experience and Expertise:**

- Look for a management entity with a strong reputation in the community association industry.

Resources and Infrastructure:

- Evaluate whether they possess the necessary tools and staff to manage effectively

Cost and Fees:

- Compare service costs and determine how they align with the cooperative's budget.

Evaluating Management by Objectives (EMBO):**EMBO System Overview:**

- A structured approach that emphasizes precise objective setting, management commitment, performance indicators, regular assessment, and board involvement.

Principle of Control Through Commitment:

- Focuses on collaborative efforts between the board and management, rather than rigid control, to ensure cooperative success.

Benefits of EMBO: Alignment with Goals:

- Keeps management aligned with the cooperative's goals.

Transparency:

- Fosters communication and accountability through regular reporting.

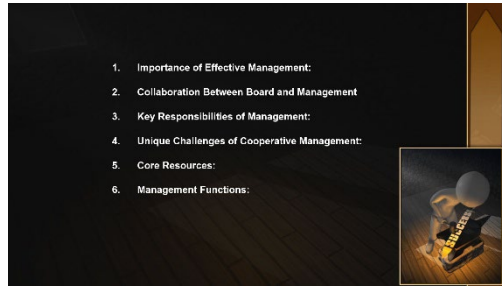
Adaptability:

- Allows for adaptability in changing conditions.

Conclusion:

Effective management is crucial for a cooperative's prosperity. By working collaboratively with professionals and employing structured management practices, cooperatives can enhance their operations, serve their members, and ensure long-term success.

Chapter 14 Review



1. **Importance of Effective Management:**

Management is crucial for the success of housing cooperatives. It ensures that the board's decisions are implemented and daily operations run smoothly to achieve the cooperative's objectives.

2. **Collaboration Between Board and Management:**

A strong partnership between the board and management is essential. The board provides direction while management implements strategies, oversees operations, and manages relationships with stakeholders.

3. **Key Responsibilities of Management:**

Providing Clear Direction:

- Management must clearly understand the cooperative's mission and goals as the board communicates.

Performance Monitoring:

- The board should establish performance indicators to evaluate the cooperative's progress and provide oversight.

Financial Management:

- Management is responsible for the cooperative's financial stewardship, including budgeting, compliance with regulations, and ensuring accurate financial reporting.

4. **Unique Challenges of Cooperative Management:**

Cooperative managers face distinct challenges, such as catering to member-owners' needs and ensuring equitable treatment, which impacts decision-making and service delivery.

5. **Core Resources:**

Successful cooperative management encompasses managing three core resources: people (including staff and board members), capital (financial assets), and facilities (including buildings and equipment).

6. **Management Functions:**

Effective management involves four essential functions—planning, organizing, motivating, and controlling—that ensure the cooperative operates efficiently.



Chapter 15

Meetings:

Cooperative New Board Training Course



Chapter 15
Meetings



Overview of what topics were covered in chapter 15

Meetings Overview: Power of Effective Meetings

Significance of Meetings:

- Meetings are essential for community associations, serving as platforms for decision-making, policy-setting, and resident engagement.

Board Meetings:

- Board meetings are central to governance and require efficiency and transparency. They allow the board to set policies, review operations, and address resident concerns.

Making the Most of Meetings: Do's and Don'ts

Do's:

- Start and end meetings on time.
- Facilitate introductions for new members and guests.
- Distribute meeting materials in advance for preparation.
- Allocate specific time slots for each agenda item.
- Keep thorough minutes to track decisions and progress.

Don't:

- Avoid revisiting past decisions unnecessarily.
- Discourage irrelevant conversations.
- Stay focused on governance issues rather than daily operations.
- Prevent contentious opinions from derailing discussions.

Types of Meetings: Navigating the Meeting Landscape

Annual Meetings:

- Essential for building community, presenting the budget, electing directors, and delivering committee reports. They foster membership and connection.

Special Meetings:

- Address specific concerns or decisions and provide a platform for resident feedback. They are essential for discussing sensitive matters requiring focused attention.

Meeting Requirements: Notify Members:

- Comply with legal requirements for notifying members about meetings.

Achieve a Quorum:

- Ensure the necessary number of members attend meetings to conduct business effectively.

Meeting Basics: Preparing for Success

Planning Tips:

- Establish clear goals for meetings and the desired outcomes.
- Create structured agendas focusing on members' priorities.
- Select convenient meeting times and locations to maximize participation.
- Distribute meeting notices well in advance using various communication channels.
- Running the Meeting:

Information and Decision Balance:

- Meetings should facilitate constructive dialogue and decision-making, ensuring all voices are heard.

Agenda Importance:

- A practical agenda maintains order and prioritizes critical items, ensuring productivity.

Voting and Documentation:

- Document votes and decisions in meeting minutes to maintain a clear record of actions taken.

Meeting Interruptions:

Managing Distractions:

- Address and minimize distractions that can derail meetings by focusing discussions on relevant topics.

Staying on Task:

- Remind participants of their focus on governance and avoid delving into minutiae that are best handled at the committee level.

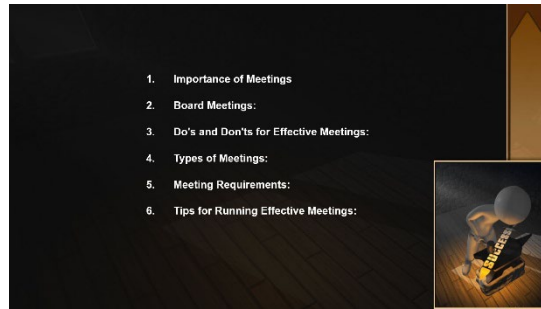
Encouraging Clear Communication:

- Use concise and engaging presentation methods to enhance information sharing and maintain participant interest.

Conclusion:

Effective meetings are crucial for the success and engagement of community associations. A well-structured approach, focused discussions, and active participation can lead to productive and enjoyable meetings that benefit all members.

Chapter 15 Review



1. **Importance of Meetings:**

Meetings are essential for community associations. They serve as platforms for decision-making, policy-setting, and fostering member engagement. They are critical to the governance and functioning of the cooperative.

2. **Board Meetings:**

Board meetings are at the core of association governance, where decisions are made regarding policies, operations, and member concerns. Conducting these meetings effectively promotes transparency and participation.

3. **Do's and Don'ts for Effective Meetings:**

Do's:

Start and end on time, provide materials in advance, allocate sufficient time for each agenda item, and maintain thorough minutes of discussions.

Don't:

Avoid revisiting prior decisions without necessity, leading to irrelevant discussions and personal conflicts that may derail the meeting.

4. **Types of Meetings:**

Key types of meetings include annual meetings, where members gather to discuss the budget, elect directors, strengthen community bonds, and hold special sessions focusing on specific issues or decisions requiring immediate attention.

5. **Meeting Requirements:**

Legal requirements necessitate notifying members about meetings and ensuring a quorum is present to conduct business effectively. This foundation supports productive and legitimate meetings.

6. **Tips for Running Effective Meetings:**

Successful meetings are built on clear goals, structured agendas, accommodating logistics, timely notice distribution, and effective facilitation to ensure discussions remain focused and productive.



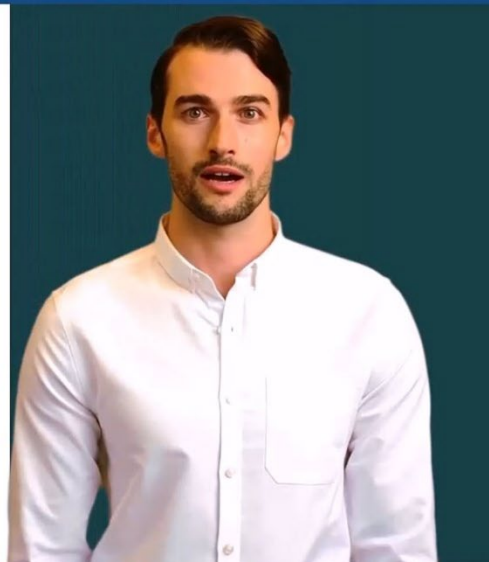
Chapter 16

Navigating the World of Parliamentary Procedures

Cooperative New Board Training Course



Chapter 16 Parliament Procedures



Overview of what topics were covered in chapter 16

Parliamentary Procedures Unveiled:

Historical Background:

- Parliamentary procedures, rooted in the early English Parliament, are structured to provide order and fairness in decision-making. Robert's Rules of Order serve as a key reference for organizations today.

Importance of Parliamentary Procedures:

Democratic Rule:

- Ensures that all members can participate and voice their opinions.

Flexibility:

- Procedures can be adapted to meet the needs of different organizations while maintaining a structured approach.

Protecting Rights:

- Guarantees fair treatment and consideration for all participants.

Embracing the Basics:

Key Elements of Parliamentary Procedure:

Making Motions:

- It must be relevant and organized about ongoing business.

Obtaining the Floor:

- Proper procedures for speaking to ensure organized discussions.

Clear Communication:

- Members should express their thoughts without ambiguity.

Rules of Debate:

- Maintain order and fairness during discussions.

Courteous Conduct:

- Promotes respect and civility in meetings.

Mastering the Art of Motions: A Guided Tour

- Hierarchy of Motions:

Main Motions:

- Introduce new topics when no other motion is pending.

Subsidiary Motions:

- Modify or influence main motions.

Privileged Motions:

- Address urgent matters that are unrelated to the current business.

Incidental Motions:

- Arise from other motions and must be addressed immediately.

Considerations for Motions:

- Ensure motions are in order and relevant.

Understand the need for a second to initiate consideration.

- Recognize which motions can be debated and how they can be amended.

Beyond the Basics:**Quorum:**

- Understanding quorums is essential for validating decisions, as they represent the minimum number of members required to conduct business.

Adjournment:

- The motion to adjourn can be strategically used to end meetings thoughtfully.

Calling for the Question:

- This motion expedites decisions by ending unnecessary debate.

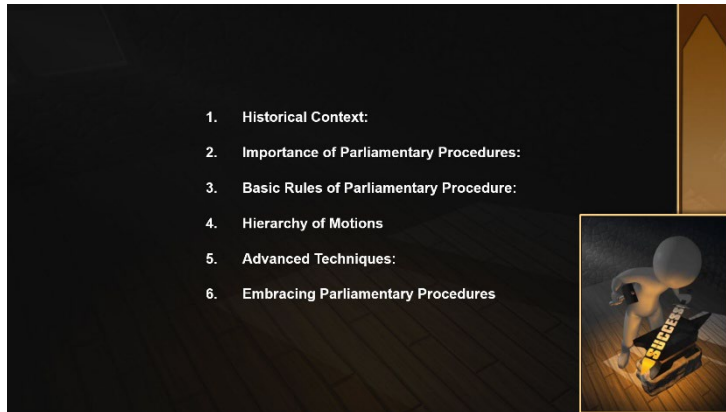
Points of Order:

- Allows members to maintain procedural integrity by addressing deviations from established rules.

Conclusion: Embracing Parliamentary

Pillars of Order: Parliamentary procedures are essential for fostering cooperation and respectful meeting discussions. Empowering Organizations: Mastering parliamentary procedures enables more productive and collaborative meetings, ensuring all voices are heard and contributing to informed decision-making.

Chapter 16 Review



1. **Historical Context:**

Parliamentary procedures, rooted in early English parliamentary traditions, serve as a structured framework for conducting meetings and making decisions. Robert's Rules of Order are widely regarded as the standard reference for parliamentary procedure in organizations today.

2. **Importance of Parliamentary Procedures:**

These procedures ensure democratic participation, flexibility, and fairness in meetings by establishing clear guidelines for decision-making and interaction among members.

3. **Basic Rules of Parliamentary Procedure:**

Understanding essential rules, such as making motions, obtaining the floor, and maintaining courteous debate, is crucial for effective meeting participation. These rules help maintain order and structure during discussions.

4. **Hierarchy of Motions:**

Motions are categorized into primary, subsidiary, privileged, incidental, and motions to reconsider. Each type serves specific functions and must be presented appropriately during meetings.

5. **Advanced Techniques:**

Advanced parliamentary procedures encompass understanding quorum requirements, strategically utilizing motions to adjourn, calling for a question to end debates, and raising points of order to maintain procedural integrity. Mastery of these techniques can enhance meeting effectiveness.

6. **Embracing Parliamentary Procedures:**

Mastering parliamentary procedures equips individuals and organizations with the skills to conduct effective meetings, fostering cooperation, transparency, and informed decision-making within cooperatives.



Chapter 17

Cooperative Members

Cooperative New Board Training Course



Chapter 17 Cooperative Members

**Embracing the Cooperative Spirit:
Members at the Heart**

Overview of what topics were covered in chapter 17

Embracing the Cooperative Spirit: Members of the Heart

A Home Beyond Walls: Cooperative living emphasizes safety, security, and dignity, providing an environment where members can thrive and engage with their community. Pillars of the Community: Cooperative members are crucial to the association's functioning. They organize, finance, elect directors, and establish governing policies.

What Members Expect and Deserve:

- Members rightfully expect:
- Safe living conditions.
- Consistent maintenance of the property. Prompt and fair resolution of complaints.
- Treatment is respectful, and they have a voice in community matters. A high-quality living environment.

Ownership and Control: Your Special Role

- Active Participation: Members are not just residents; they hold legal responsibilities involving:
- Approving and amending governing documents.
- Electing directors and voting on significant actions.
- Ensuring compliance with laws and regulations unique to cooperatives.

Members' Rights and Responsibilities:

Rights:

- Participate in a democratically run community.
- Request opportunities for improvement and change.
- Maintain privacy and enjoy a safe environment.

Responsibilities:

- Attend meetings and stay informed.
- Respect the rights and privacy of others.
- Pay monthly shares on time and report maintenance issues.

Maintenance: The Lifeblood of Cooperatives

Quality Housing:

- Cooperative housing aims to provide affordable, quality living. It requires proper maintenance investment to preserve property values and ensure community aesthetics.

Commitment to Standards:

- Cooperatives must meet or exceed private market standards, avoiding compromises that degrade living conditions.
-

Role of the Board:

- The board of directors is responsible for ensuring the cooperative's ongoing maintenance and making decisions that impact the community's overall health.

Nurturing Cooperative Communities

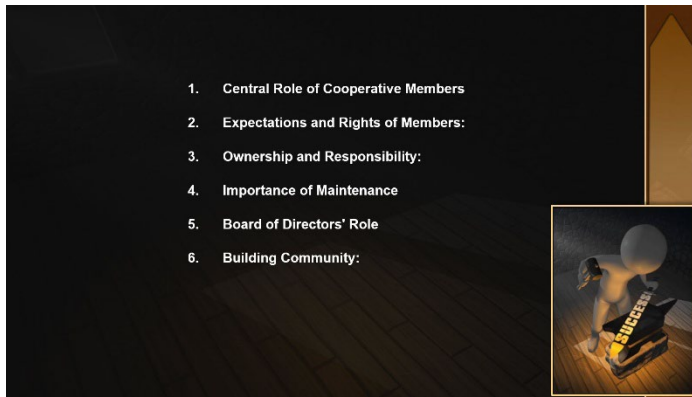
Members are fundamental to the vibrancy of cooperative living. They drive engagement, maintain standards, and shape the community's future. By recognizing their rights and responsibilities and prioritizing maintenance, members contribute to a sustainable and thriving cooperative environment.

Conclusion:

Cooperative living transcends mere residence; it embodies shared values and aspirations. By understanding their roles and fostering a collaborative spirit, members can build a vibrant and inclusive future for themselves and future generations.

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Chapter 17 Review



1. **Central Role of Cooperative Members:**

Members are not just residents but integral to the cooperative community's identity and vitality. They take active roles in governance, decision-making, and shaping the cooperative's direction.

2. **Expectations and Rights of Members:**

Cooperative members have rights that include safety, respect, a voice in community affairs, access to transparent financial records, and a high-quality living environment. Their expectations are at the heart of the cooperative's mission.

3. **Ownership and Responsibility:**

Members have legal responsibilities, including approving governing documents, electing directors, and ensuring compliance with laws governing cooperatives. Their engagement is essential for effective governance.

4. **Importance of Maintenance:**

Proper maintenance is vital for preserving the cooperative's property value and ensuring a comfortable living environment. Members are encouraged to participate actively in maintenance and improvement initiatives.

5. **The Board of Directors' Role:**

The board, elected by members, plays a critical role in overseeing the cooperative's management, guiding policies, and ensuring it meets its members' needs and expectations.

6. **Building Community:**

Cooperative living fosters strong relationships among members, contributing to a sense of safety, security, and belonging. The collaborative environment allows residents to form supportive connections, enhancing the quality of life for everyone involved.



Chapter 18

The Power of Committees -

Cooperative New Board Training Course



Overview of what topics were covered in chapter 18

Committee Function:

Importance of Committees:

- Committees are essential for guiding the cooperative and executing the board's decisions. They provide expertise and resources, and their recommendations support the community's success.

Establishing Committee Commission Statements:

- This document outlines the committee's purpose, authority, and operational guidelines, ensuring clarity and alignment with the cooperative's goals.

Optimal Committee Functioning:

- Clearly defined objectives, member requirements, appropriate committee size, and term limits help committees operate efficiently and effectively.

The Role of Committees: Enhancing Cooperative Vitality

Supporting the Board:

- Committees complement the board by providing specialized insights and recommendations, engaging members, and fulfilling responsibilities diligently while adhering to ethical standards.

Board Liaison Connection:

- Each board member serves as a liaison to a committee, facilitating communication, resolving disputes, and promoting coordination between the board and committees.

Charges to a Committee: The Blueprint for Action

Appointment of Committee Chairs:

- Chairs are appointed with the board's consent, and a board member serves as an advisory member to strengthen connections.

Accountability:

- Committees follow structured decision-making processes, emphasize accountability, and maintain open lines of communication with the board.

Serving as a Committee Liaison: The Glue Between Board and Committees

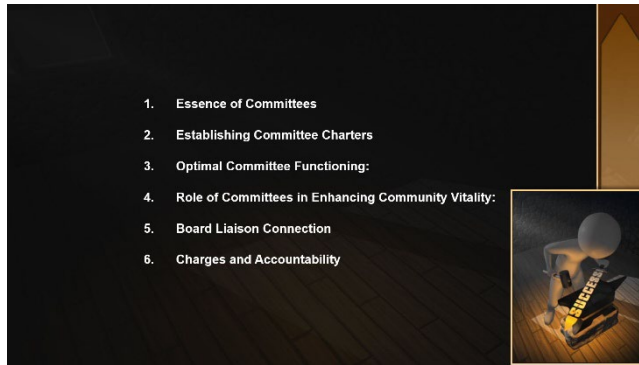
Key Responsibilities:

The liaison ensures effective communication between the board and committees, attends meetings as a non-voting member, conveys requests and recommendations, and helps align committee efforts with the organization's strategic goals.

Conclusion:**Building a Vibrant Cooperative Through Committees**

Committees harness members' collective wisdom and energy, driving growth and development within the cooperative. Their effectiveness reflects the cooperative's commitment to transparency, inclusivity, and progress.

Chapter 18 Review



1. **Essence of Committees:**

Committees serve as the backbone of the cooperative, providing guidance and expertise to the Board of Directors. They are crucial in shaping the cooperative's future and implementing the board's decisions.

2. **Establishing Committee Charters:**

Committees should have clearly defined charters that outline their purpose, powers, meeting frequency, and members' responsibilities. These charters serve as a foundational governance tool for committee operations.

3. **Optimal Committee Functioning:**

Successful committees require clarity in objectives and timelines, appropriate size (typically 4-6 members), and term limits to prevent stagnation and promote fresh perspectives and diversity.

4. **Role of Committees in Enhancing Community Vitality:**

Committees contribute to the cooperative's success by providing expertise, developing educational programs, engaging members, and making recommendations to the board, all while acting in the association's best interests.

5. **Board Liaison Connection:**

Board members serve as liaisons to committees, facilitating communication and ensuring that relevant information flows between the board and committees. This helps committees align their efforts with the cooperative's strategic goals.

6. **Charges and Accountability:**

Clear expectations and responsibilities for committees are essential. Committees should operate under the board's guidance, with accountability mechanisms in place to ensure they fulfill their duties effectively and provide valuable input to the board.



Chapter 19

Communication

Cooperative New Board Training Course



Chapter 19 Communications



Overview of what topics were covered in chapter 19

Communication Overview:

Importance of Effective Communication:

- Effective communication fosters member engagement and informed decision-making within a cooperative. It serves as the foundation for a thriving community association.

Two-way flow of Information:

- A successful communication strategy involves transmitting information from the board to members and soliciting feedback to address members' needs and concerns.

Cost-Effective Communication:

Affordable Methods:

- Informal interactions, meetings, bulletin boards, and newsletters can achieve effective communication with minimal expense. It's more about commitment than budget size.

Use of Committees:

- Committees play a crucial role in communication by engaging residents, conveying important information, and fostering a strong community connection.

Essential Board Member Skills:

Skills in Effective Communication:

Listening:

- Board members must prioritize listening to enhance understanding.
- Objectivity: Separate personal emotions from business decisions.

Financial Aptitude:

- Comprehend the cooperative's financial health to communicate effectively.

Effective Communication:

- Use transparent, respectful, and professional communication channels, especially in written form.

Crisis Communications:

Preparation for Crises:

- Board members must develop effective crisis communication plans to prepare for various crises, from natural disasters to reputational issues.

Types of Crises:

- Distinguish between emergencies managed by staff and controversies that involve board participation. Share experiences related to these situations.

The Board's Role in a Crisis:

- Ensure the cooperative operates legally and ethically while working collaboratively to manage crises and maintain consistent communication with stakeholders.
-

Planning for Crisis Communication:

Crisis Communication Plan Components:

- Here are contact lists for crisis control team members and stakeholders, media strategies, essential policy statements, meeting logistics, and a communication tree.

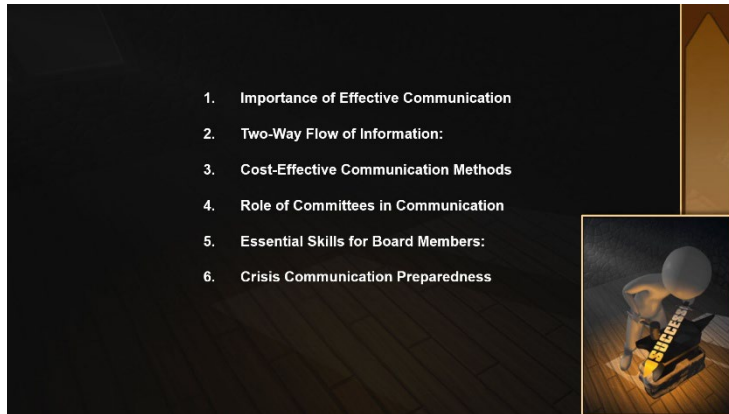
Designating a Spokesperson:

- The CEO or board chair typically serves as the spokesperson, providing clear and reassuring communication during a crisis.

Conclusion:

Effective communication, including preparation for crises and proactive engagement with members, forms the backbone of a resilient cooperative. By mastering effective communication strategies, cooperatives can maintain trust and cohesion during stable and turbulent times.

Chapter 19 Review



1. **Importance of Effective Communication:**

Effective communication is fundamental to a cooperative's success. It facilitates engagement, decision-making, and a strong connection between the board and its members.

2. **Two-Way Flow of Information:**

Communication should be a dynamic exchange between the board and members, emphasizing the need for feedback mechanisms to ensure that members' voices are heard and their concerns are addressed.

3. **Cost-Effective Communication Methods:**

Cooperatives can maintain effective communication without significant expenses by utilizing informal interactions, meetings, community bulletin boards, newsletters, and digital platforms to disseminate information and engage residents.

4. **Role of Committees in Communication:**

Committees play a crucial role in fostering communication within the cooperative by facilitating the dissemination of information, welcoming new members, and ensuring that community activities and news are effectively communicated.

5. **Essential Skills for Board Members:**

Committees play a crucial role in fostering communication within the cooperative by facilitating the dissemination of information, welcoming new members, and ensuring that community activities and news are effectively communicated.

6. **Crisis Communication Preparedness:**

Boards must prepare for potential crises by developing effective crisis communication plans that address various scenarios, clearly defining roles for the board and staff and ensuring timely and transparent communication with stakeholders.



Chapter 20

Developing Community

Cooperative New Board Training Course



Chapter 20 Communities

Developing Community



Overview of what topics were covered in chapter 20

Developing Community

Essence of Housing Cooperatives:

- Housing cooperatives are vibrant communities that foster a sense of belonging among members. While affordability unites them, the emphasis is on creating supportive living environments.

Building Strong Relationships:

- Strong relationships among members are the foundation of a successful cooperative. The board must manage effectively and promote a nurturing atmosphere.

Tools to Foster Community:

Board Meetings and Informational Meetings:

- Regular meetings allow members to discuss important issues and engage with community governance.

Association Website:

- A user-friendly website is a hub for interaction, showcasing member profiles, announcements, and community updates.

Newsletter:

- Regular newsletters keep members informed, featuring essential updates, events, and relevant articles tailored to their demographics.

Welcome Letters and Committees:

- New members receive welcome packets and support from a dedicated welcome committee to help them integrate into the community.

Personal Outreach:

- Direct communication via emails or phone calls fosters transparency and builds trust among members.

Community Apps:

- Mobile apps enhance engagement by enabling residents to access services and documents and facilitating easy communication.

Social Activities:

- Organizing community events helps strengthen bonds among members.

Bulletin Boards:

- Physical bulletin boards are informal hubs for sharing information and fostering community interaction.

Disaster Drills:

- Preparedness plans demonstrate proactivity regarding residents' safety and well-being.

Community Benefits

Economic Growth:

- Cooperatives contribute to local economic vitality, exemplified by initiatives like artists' co-ops revitalizing neighborhoods.

Neighborhood Stability:

- They provide affordable housing, stabilize neighborhoods facing gentrification, and help retain lower-income families.

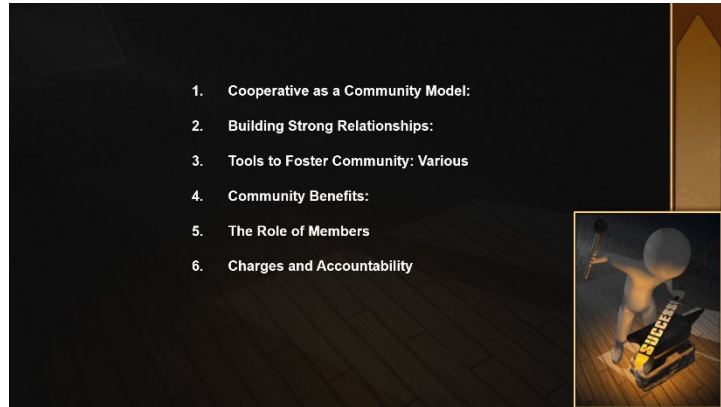
Combating Out-Migration:

- Senior cooperatives support aging members by allowing them to remain in rural communities, fostering regional stability.

Conclusion: Building a Brighter Future Together

Cooperative living is not just about shared spaces; it embodies communal values and responsibilities. By understanding members' rights and prioritizing collaboration, cooperatives can enhance their environments and promote sustainability for future generations.

Chapter 20 Review



1. **Cooperative as a Community Model:**

Housing cooperatives are not just models of affordable living; they are vibrant communities where members actively engage and collaborate to create a strong sense of belonging.

2. **Building Strong Relationships:**

Healthy relationships among members are essential for a thriving cooperative. Strong community ties enable members to work collaboratively, ensuring effective governance and enhancing the overall quality of life.

3. **Tools to Foster Community:**

Various strategies can foster community within housing cooperatives, including regular board and informational meetings, informative newsletters, welcome committees for new members, and social activities promoting engagement and interaction among residents.

4. **Community Benefits:**

Cooperatives contribute to broader community stability and growth, as demonstrated by revitalizing neighborhoods, providing affordable housing options, and combating out-migration in rural areas by creating supportive environments for residents.

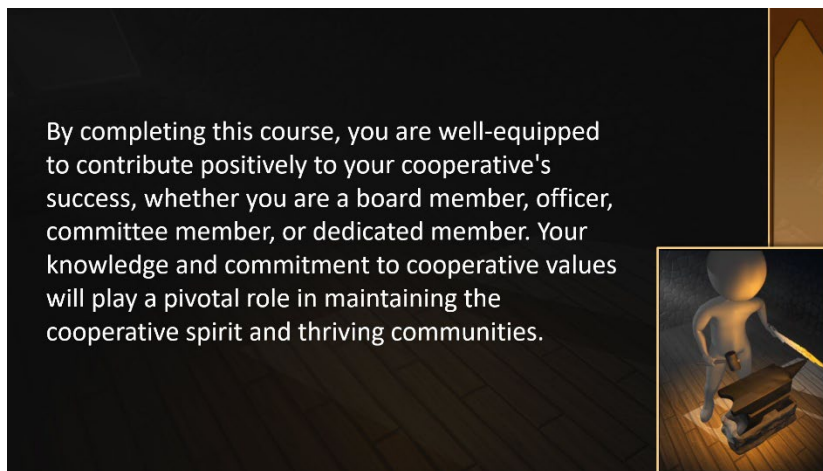
5. **The Role of Members:**

Members are residents and active participants in shaping their communities, with rights and responsibilities contributing to the cooperative's mission and values.

6. **Long-Term Vision:**

Members are residents and active participants in shaping their communities, with rights and responsibilities contributing to the cooperative's mission and values.

Conclusion: New Board Member



By completing this course, you will be well-equipped to contribute positively to your cooperative's success, whether you are a board member, officer, committee member, or dedicated member. Your knowledge and commitment to cooperative values will sustain a collaborative spirit and foster thriving communities.



Video of member orientation for new members or use on the site to use for promo
This video is available for free download on the [BerendsonAcademy](https://berendsonacademy.com) website.

Questions?

More Information?



Timing for training

Training Guide

Welcome		
Welcome and Introduce Yourself	slide	10 Min
Ice Breaker		20 Min
Introducing Berendson Academy	Slide	3 Min
Video Introduction to Berendson Academy	Video	3 Min
Overview of chapters and topics		5 Min
Video introduction of the course	Video	3 Min
Total Minutes		

The World of Cooperatives		
Introducing Chapter 1	slide	3 Min
Chapter 1 Training Video	Video	5 Min
Chapter 1 Review Questions	Slide	10 Min
Total Minutes		18 Min

Housing Cooperatives		
Introducing Chapter 2	slide	3 Min
Chapter 2 Training Video	Video	5 Min
Chapter 2 Review Questions	Slide	10 Min
Total Minutes		18 Min

Cooperative Documents		
Introducing Chapter 3	slide	3 Min
Chapter 3 Training Video	Video	5 Min
Chapter 3 Review Questions	Slide	10 Min
Total Minutes		18 Min

Cooperative Structures		
Introducing Chapter 4	slide	3 Min
Chapter 4 Training Video	Video	5 Min
Chapter 4 Review Questions	Slide	10 Min
Total Minutes		18 Min

Board of Directors		
Introducing Chapter 5	slide	3 Min
Chapter 5 Training Video	Video	5 Min
Chapter 5 Review Questions	Slide	10 Min
Total Minutes		18 Min

Officers of The Cooperatives		
Introducing Chapter 6	slide	3 Min
Chapter 6 Training Video	Video	5 Min
Chapter 6 Review Questions	Slide	10 Min
Total Minutes		18 Min

Directors Leadership		
Introducing Chapter 7	slide	3 Min
Chapter 7 Training Video	Video	5 Min
Chapter 7 Review Questions	Slide	10 Min
Total Minutes		18 Min

The Power of Strategic Planning		
Introducing Chapter 8	slide	3 Min
Chapter 8 Training Video	Video	5 Min
Chapter 8 Review Questions	Slide	10 Min
Total Minutes		18 Min

Navigating Directors Governance		
Introducing Chapter 9	slide	3 Min
Chapter 9 Training Video	Video	5 Min
Chapter 9 Review Questions	Slide	10 Min
Total Minutes		18 Min

Policies for Directors		
Introducing Chapter 10	slide	3 Min
Chapter 10 Training Video	Video	5 Min
Chapter 10 Review Questions	Slide	10 Min
Total Minutes		18 Min

Cooperative Rules		
Introducing Chapter 11	slide	3 Min
Chapter 11 Training Video	Video	5 Min
Chapter 11 Review Questions	Slide	10 Min
Total Minutes		18 Min

Navigating Finance		
Introducing Chapter 12	slide	3 Min
Chapter 12 Training Video	Video	5 Min
Chapter 12 Review Questions	Slide	10 Min
Total Minutes		18 Min

Working With Professionals		
Introducing Chapter 13	slide	3 Min
Chapter 13 Training Video	Video	5 Min
Chapter 13 Review Questions	Slide	10 Min
Total Minutes		18 Min

Management		
Introducing Chapter 14	slide	3 Min
Chapter 14 Training Video	Video	5 Min
Chapter 14 Review Questions	Slide	10 Min
Total Minutes		18 Min

Meetings		
Introducing Chapter 15	slide	3 Min
Chapter 15 Training Video	Video	5 Min
Chapter 15 Review Questions	Slide	10 Min
Total Minutes		18 Min

Parliamentary Procedures		
Introducing Chapter 16	slide	3 Min
Chapter 16 Training Video	Video	5 Min
Chapter 16 Review Questions	Slide	10 Min
Total Minutes		18 Min

Cooperatives Members		
Introducing Chapter 17	slide	3 Min
Chapter 17 Training Video	Video	5 Min
Chapter 17 Review Questions	Slide	10 Min
Total Minutes		18 Min

Power of Committees		
Introducing Chapter 18	slide	3 Min
Chapter 18 Training Video	Video	5 Min
Chapter 18 Review Questions	Slide	10 Min
Total Minutes		18 Min

Communications		
Introducing Chapter 19	slide	3 Min
Chapter 19 Training Video	Video	5 Min
Chapter 19 Review Questions	Slide	10 Min
Total Minutes		18 Min

Developing Community		
Introducing Chapter 20	slide	3 Min
Chapter 20 Training Video	Video	5 Min
Chapter 20 Review Questions	Slide	10 Min
Total Minutes		18 Min

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Introducing Chapter 20	slide	3 Min
Chapter 20 Training Video	Video	5 Min
Chapter 20 Review Questions	Slide	10 Min
Total Minutes		18 Min

Developing Community		
Introducing Chapter 20	slide	3 Min
Chapter 20 Training Video	Video	5 Min
Chapter 20 Review Questions	Slide	10 Min
Total Minutes		18 Min

Training Person for New Cooperative Board Members

Name: Mary Johnson

Age: 58

Background: Mary falls within the target audience's age range, has limited formal education, and comes from a lower-income background. She resides in a small town near a major city in the United States.

Experience: Mary is entirely new to the responsibilities of a cooperative board member. She has never held a leadership role in any organization before.

Motivation: Mary is motivated by her desire to represent the cooperative's members and keep carrying charges low, benefiting her fellow members, many of whom are low-income. She sees joining the cooperative board as an opportunity to give back to her community and make a positive impact.

Challenges: Mary faces challenges related to her lack of experience in governance roles. She struggles to understand various aspects of her duties, such as budgeting, creating repair reserves, and effectively participating in board meetings. These are areas where she feels she needs guidance and support.

Communication and Learning Preferences: Given Mary's age and educational background, she benefits from a combination of training methods. She appreciates in-person training sessions that provide practical examples and hands-on experience. However, she also finds it helpful to have access to simplified online resources and supplementary materials to reinforce her learning.

Misconceptions: Mary may have misconceptions about the extent of her responsibilities, particularly regarding budgeting and reserving funds. She may not fully grasp the complexity of these financial aspects and their importance in maintaining the cooperative's long-term sustainability.

Goals: Mary's primary goal is to become a knowledgeable and effective board member who can represent the cooperative members and contribute to her continued success. She aims to understand and fulfill her duties, particularly in financial planning, reserve funds, and collaborative governance.

To support Mary and others like her as cooperative board members, comprehensive training that breaks down complex concepts, offers practical examples, and encourages active participation in board meetings is essential. Emphasizing the cooperative's mission and its positive impact on the community can also motivate and inspire members.