

Workshops

Which Workshops will you attend?

**Sunday, April 29, 2018, 8:30am-6pm
& Co-op Social 6-8pm**

SESSION I: Concurrent Workshops

- Co-ops 101
- Introduction to Sociocracy
- Legal Entity Options for Worker Cooperatives^{CLE}
- Heads Up! For Food Co-ops
- ¿Que es una Cooperativa? y Como forma una Cooperativa de Trabajadores^{SP}

SESSION II: Concurrent Workshops

- Platform Co-ops^{CLE}
- Shared Housing Co-ops for Young Adults and Small Families
- Recruiting Owners, Turning Them into Shoppers
- Directors Roles and Responsibilities^{CLE}
- Comenzando una Cooperativa y la Gobernacion^{SP}

SESSION III: Concurrent Workshops

- Making Meetings Awesome
- Planting Seeds of Democratic Culture into Co-op
- Governing Documents ^{A-CLE}
- Developing & Financing Limited Equity Housing Co-ops^{CLE / CPE}
- Business Planning for Co-op Start-ups
- La gobernacion de Cooperativas (continuado)^{SP}

SESSION IV: Concurrent Workshops

- Run your Cooperative Effectively on Weaver
- Six Steps for Cooperative Housing Development
- Co-op Lender Panel
- Advanced Examination of Impact of New Tax Law on Co-ops ^{A-CLE / CPE}
- Roundtable Discussion for Food Co-op Start-ups

**CO-OP CELEBRATION & SILENT AUCTION
OPEN TO THE PUBLIC 6-8pm**

Monday, April 30, 2018, 8:45am-4:45pm

SESSION I: Concurrent Workshops

- An Inside Look at Housing Cooperatives
- Decision Making Processes: Approaches to Governance: from Roberts Rules to Consensus
- Funds: How Cooperatives Can Help Investment Dollars Flow into the Co-op and Local Economy^{CLE / CPE}
- Cooperatives in the Age of Social Enterprise^{CLE}
- Taxes and Accounting for Worker Co-ops^{CLE / CPE}

SESSION II: Concurrent Workshops

- Mediation in Co-ops
- Strategic Tools for Worker Co-op Development in Marginalized Communities
- Developing and Financing Limited Equity Housing Cooperatives
- Developing a Legal Strategy to Finance Your Cooperative^{CLE / CPE}

SESSION III: Concurrent Workshops

- Making Finances Fun
- The Next Frontier for Rural Electric Cooperatives^{CLE}
- Living the Co-op Principles
- Tending to Power Dynamics in our Teams through Democratic Communication and Decision-Making

CLE-Workshop is eligible for continuing legal education credit; general audience is welcome
CPE-Workshop is eligible for continuing accounting education credit; general audience is welcome
A-CLE/CPE indicates that the workshop is advanced and designed for attorneys, CPAs and others with a good understanding of cooperatives.



Questions? Contact Us!



**Website: www.cccd.coop
E-mail: coops@cccd.coop
Phone: 530-297-1032
Fax: 530-297-1033**

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out the Conference!
How sees



April 29 - 30, 2018
Marina Village Conference Center
San Diego, CA



CO-OP Conference

ENGAGE

LEARN

DISCOVER

Saturday, 4/28 Pre-Conference:

Sociocracy: Become More Effective Together

Sheella Mierson, Sociocracy Consulting Group

Sociocracy is a dynamic governance approach to organizational design and project management. This whole-systems approach supports collaborative decision-making and governance that is transparent and inclusive. In this experiential workshop, you will learn about new ways to run your meetings and ensure that all policy decisions support the work and mission of the co-op/organization. Sociocracy:

- Kindles creativity, innovation, and entrepreneurial spirit
- Maximizes effectiveness and streamlines decision-making
- Reduces tensions around power
- Increases individual and collective engagement, commitment, and initiative

Keynote Speaker: Vernon Oakes



Sunday, April 29th

Building a Better World:

The Case for a Cooperative Economy

Cooperatives are engines of economic growth offering a dynamic and flexible business model that affords consumers, farmers, and independent small businesses security in a marketplace dominated by traditional large corporations. Co-ops also address fundamental human needs such as housing, meaningful work, self-determination, and community. Drawing from his radio show, *Everything Co-op*, Vernon Oakes will share examples of how the cooperative business model is an effective alternative to state the profit-focused "return on investment."



Sunday

Workshops presented in Spanish or interpreted throughout the day. Talleres presentados en español o con interpretación.

Co-ops 101 shares co-op basic characteristics that differentiate the cooperative business model and the many ways that the model is used. *E. Kim Coontz, California Center for Cooperative Development.*

Introduction to Sociocracy presents how to include everyone's voice and still efficiently run organizations and meetings. *Sheella Mierson, The Sociocracy Consulting Group.*

Legal Entity Options for Worker Cooperatives presents important factors to consider when incorporating. *Charlotte Tsui, and Ricardo Nuñez, Sustainable Economies Law Center.*

Heads Up! For Food Co-ops discusses the changing food industry and impacts on start-ups and existing co-ops. *Stuart Reid and Jacqueline Hannah, Food Co-op Initiative.*

Platform Co-ops provides a summary of the key structural elements of this emergent sector of the cooperative economy. *Jason Wiener, Principal, Jason Wiener | p.c., a public benefit corporation*

Co-op Directors Roles and Responsibilities is a fundamental cooperative board training that covers the governance obligations and fiduciary duties under the California Co-op Law. *Therese Tuttle and Sushil Jacob, Tuttle Law Group*

Shared Housing Co-ops for Young Adults and Small Families discusses strategies for creating an affordable way to serve single adults, small families, and students, through smaller units and shared facilities, with the added benefit of a residential community. *Corrigan Nadan-Nichols, North American Students of Cooperation.*

Recruiting Owners, Turning Them Into Shoppers is directed for Food Co-op start-ups. *Jacqueline Hannah, Food Co-op Initiative.*

Making Meetings Awesome: Empowerment, Participation, and Productivity shares solutions, strategies, and tools for effective communication and decision making. *Kate "Sassy" Sassoon, Sassy Facilitation.*

Developing and Financing Housing Cooperatives will discuss traditional financing methods for established housing cooperatives and the development of work-force housing cooperatives using public and private partnerships. *Larry Mathe, National Cooperative Bank.*

Business Planning for Food Co-op Startups discusses what it is, why you need it, and where to get the information needed to create it. *Stuart Reid, Food Co-op Initiative.*

Planting Seeds of Democratic Culture into Co-op Governing Documents focuses on bylaw and policy mechanisms that emphasize participatory management and anticipates the needs of cooperatives as they grow. *Tim Huet, Arizmendi Association of Cooperatives [Advanced legal].*

Run your Cooperative Effectively on Weaver discusses open source software to help self-managed teams to come together and get things done. *Keith Swenson, Cofounder, Meeting Weaver Tech.*

Six Steps for Cooperative Housing Development presents an overview of the development process and provides examples. *Linda Brockway, National Association of Housing Cooperatives (NAHC).*

Co-op Lender Panel discusses financing options for worker and consumer cooperatives. *Leigh Taylor, National Cooperative Bank, Mark Fick, Shared Capital; and Nicole Boone, Capital Impact Partners.*

Roundtable Discussion for Food Co-op Start-ups: Bring your ideas, questions, and challenges and engage in problem-solving. *Stuart Reid and Jacqueline Hannah, Food Co-op Initiative; Luis Sierra, California Center for Cooperative Development.*

Advanced Examination of Impact of New Tax Laws on Co-ops — Workshop will discuss how new income tax ruling effects cooperatives, including IRC 199A. *Bruce Mayer, Wegner CPAs [Advanced legal].*

Workshops

Monday

An Inside look at Housing Cooperatives covers why you should evaluate your housing cooperative and how to do the evaluation. Includes real life stories of housing cooperatives and how they impact the members and their families. *Vernon Oakes, Oakes Management and Everything Co-op.*

Decision Making Processes: Approaches to Governance from Roberts Rules to Consensus discusses the different decision making processes used by co-ops, focusing on the benefits, challenges, and appropriate contexts for each. *Kate "Sassy" Sassoon, Sassy Facilitation.*

Funds: How Cooperatives Can Help Investment Dollars Flow into the Cooperative and Local Economy introduces why co-ops are in a better position than non-cooperative businesses to create funds. Includes strategies, potential investment vehicles; and legal considerations. *Sarah Kaplan and Clark Arrington, The Working World and Cutting Edge Counsel.*

Taxes and Accounting for Worker Co-ops discusses start-up considerations, tax treatment of partnerships vs corporations as well as co-op conversions and ramifications of new tax law for co-ops. *Bruce Mayer, Wegner CPAs.*

Cooperatives in the Age of Social Enterprise explores the nuances of social enterprises and how cooperatives can leverage their internal governance structure to reach a whole new audience. *Anastasia Butler and Chris Cohen, Sustainable Law Group, P.C.*

Mediation in Co-ops teaches practical skills to transform interpersonal conflicts into mutually agreeable action. *Corrigan Nadan-Nichols, North American Students of Cooperation.*

Strategic Tools for Worker Co-op Development: Creating Opportunities and Empowerment in Marginalized Communities will discuss strategies that contribute to development and empowerment successes. *E. Kim Coontz, California Center for Cooperative Development.*

Developing and Financing Limited Equity Cooperatives shares strategy to address California's critical housing shortage with long term affordability to working households. *Karen Tiedemann, Goldfarb and Lipman, LLP and Brian Dahlik, Wegner Associates.*

Developing a Legal Strategy to Finance Your Cooperative discusses key issues to consider and plan for as co-ops contemplate raising money from non-members. *Brett Heeger, Gartenberg Gelfand Hayton LLP.*

Living the Co-op Principles shares concrete examples of fulfilling Principle 7: Concern for Community and Principle 6: Cooperation among Cooperatives. *Andi Briceño, Andre Andersen, and Stephanie Mood from Ocean Beach Peoples Co-op.*

Making Finances Fun – Reading and Understanding Financial Statements presents an engaging primer on skills needed to monitor co-op performance. *Stephen Switzer, ABC Bookkeeping Cooperative.*

The Next Frontier for Rural Electric Cooperatives describes how two rural electric and an organized group of citizens set up a federated cooperative to provide internet access to commercial and residential members at state of the art speeds. *Roland Hall, Autry, Hall & Cook, LLP, Atlanta, Georgia.*

Tending to Power Dynamics in our Teams through Democratic Communication and Decision-Making offers concrete strategies for using collaborative power to counter-act prevailing power dynamics. *Rebecca Fisher-McGinty, Round Sky Solutions.*

For complete workshop descriptions, new workshops & speaker bios, see:

www.cccd.coop/events



Registration

Marina Village Conference Center, San Diego, CA
Pre Conference Sat. 4/28
Conference: Sun. 4/29- Mon. 4/30

Name: _____

Co-op/Org: _____

Address: _____

Email: _____

Phone: _____

Registration includes light breakfast, lunch & break refreshments each day. Sunday Social includes appetizers & is free of charge to everyone.

FULL CONFERENCE: 2 Days **General*** **CCCD Member***

Full Conference	\$330	\$300	\$ _____
MCLE or CPE Credit, additional charge	\$55	\$40	\$ _____

1 DAY ONLY (check one) **SUN** **MON**

	General*	CCCD Member*	
1 Day Conference	\$230	\$200	\$ _____
Add MCLE and/or CPE Credit	\$45	\$30	\$ _____

Discount for additional people from same org/group: subtract \$20 each, up to 5 additional people. (One person must be registered at full conference rate)

SOCIOCRACY PRE-CONFERENCE

Add to Conference Reg.	\$240	\$210	\$ _____
Pre-Conference Only (No Conf. Reg.)	\$260	\$230	\$ _____

LATE FEE

Registration after April 11th: Add \$25 late fee

Scholarship donation - Can you make a \$10 tax deductible donation to the scholarship fund?

***Membership Fee** (if not already a member, see information below)

MEAL PREFERENCE (check one)	TOTAL	\$ _____
<input type="checkbox"/> Meat OK <input type="checkbox"/> Vegetarian <input type="checkbox"/> Gluten Free <input type="checkbox"/> Vegan		

Not yet a member? Choose your level from the chart below & include payment with this registration to receive discounted rate. Your membership contribution is considered a tax deductible donation.

INDIVIDUAL MEMBERSHIP

<input type="checkbox"/> Individual	\$50-\$200
<input type="checkbox"/> Low Income or Student	\$25

CO-OP/ORGANIZATIONAL MEMBERSHIP (Based on Annual Revenue)

<input type="checkbox"/> Less than \$200,000: \$50	<input type="checkbox"/> \$1 Million - \$2,999,999: \$250
<input type="checkbox"/> \$200,000 - \$399,999: \$100	<input type="checkbox"/> \$3 Million - \$99 Million: \$350
<input type="checkbox"/> \$400,000 - \$699,000: \$150	<input type="checkbox"/> \$100 Million - \$999 Million: \$500
<input type="checkbox"/> \$700,000 - \$999,999: \$200	<input type="checkbox"/> \$1 Billion & Above: \$750

Cancellation Fee: \$30 - Cancellations after April 21st are not refundable

California Center for Cooperative Development

To pay with credit card, register online at <http://www.cccd.coop/events/2017CCC>
OR send your registration and check made out to CCCD at:
979 F Street, Suite A-1, Davis, CA 95616

Questions? Call (530) 297-1032 or e-mail us at coops@cccd.coop

THANK YOU!

*This conference is co-sponsored by the Sustainable Economies Law Center, a State Bar of California approved MCLE provider. Except where noted, the Law Center certifies that this activity has been approved for 1.5 hours of MCLE credit per accredited workshop, except where otherwise noted.