

Incubation Options for Co-ops Collaborating with Worcester Roots

Category

Task

Roots' Possible Roles

Compensation for Roots' staff time needed?

Business Planning & Training	Business plan overview, distribution of tasks, finding where support is needed from consultants, lawyers, etc.	Usually shared with co-op members.	None needed.
	Business planning training including		
	1.1.1 Co-op 101 / intro to dev't process		
	1.1.2 Working Together		
	1.1.3 Products & Markets		
	1.1.4 Financials		
	1.1.5 Covering our Assets		
	1.1.6 Making Membership Meaningful		
	1.1.7 Personal Finance		
	1.1.8 Doing Business	Over a more advanced and focused co-op academy to manager and potential member/owners fall 2014, including facilitation of much of curriculum here: http://cultivate.coop/wiki/Academy	Regular fee applies and only additional compensation needed if above and beyond our current plans for a co-op academy.
1.1.9 Company Policies	Scouting locations, bringing proposals. Offering start-up space in Roots office.	Depending on circumstances.	
1.1.10 Greening the Co-op	Assessment, suggested actions	Depending on circumstances.	
1.1.11 The Business Plan	Repeat of necessary trainings, general capacity building in areas still lacking.	Compensation for Roots' staff time needed.	
1.1.12 Raising Capital			
	Long-term growth / post-founder plans.		
	Finding locations for operations.		
	Ensuring environmental / green practices and image		
Incorporation/Legal Coordination	Industry research, operations manuals, marketing connections.	Not Roots' forte but can help point in right direction.	None needed.
	Structure and legal entity options proposals and discussions	Roots can bring research and ideas for worker/owners to decide	Roots can do some pro-bono, if more than 20 hours, need some staff compensation
	Oversee meetings with lawyers	Roots can coordinate	Same as above.
	Formalizing bylaws	Roots can coordinate	Same as above.

Documentation/Media	Written documentation	Setting up a blog, Documenting for an Online archive, Documenting business planning process to make it replicable	Compensation for Roots' staff time needed.
	Create a documentary about the creation of the co-op (with Future Focus Media Co-op)	Filming all major events, editing in collaboration with a storyteller/writer/founders.	This can be part of a grant we can write for medium and long-term work.
	Ensure that it is a tool to grow the local and regional co-op movements with film screenings and more.	Organizing speaking tours, tours of plant, etc.	This can be part of a grant we can write for medium and long-term work.
	Help it become an inspiration as a co-op that could be in the national spotlight.	Be strategic about replicability	This can be part of a grant we can write for medium and long-term work.
Media relations / social media work (with Future Focus Media Co-op)	Shared, but Roots can certainly do some work with local media and create materials for wider media coverage.	This can be part of a grant we can write for medium and long-term work.	

Investment	Find appropriate sources for financing	Research, inquiries, supporting writing proposals.	Roots can do some pro-bono, if more than 20 hours, need some staff compensation
	Finding appropriate paths for worker investment and building of ownership.	Roots can share templates and work with co-op members to adapt to fit needs.	Roots can do some pro-bono, if more than 20 hours, need some staff compensation

Relationships with partners	Build relationship with institutional partners (unions, anchor institutions, etc.)	Share relationships and handle logistics of such meetings.	Part of a grant we can write for medium and long-term work
	Discuss pension and retirement options.	Get the options on the table.	Part of a grant we can write for medium and long-term work
	Maintain communication with other co-ops and a presence at the SAGE Alliance.	Maintain active communication with other co-ops.	None needed.
	Keep other community partners in the loop.	Shared role with co-op.	None needed.

Recruitment	Finding member owners	Setting up recruitment and hiring process	Depending on circumstances.
		Distribute job description to Worcester area and regional networks	None needed.
		Helping wade through applicants to find top candidates.	Some compensation for staff time needed.
		Setting up interviews and being present at these.	Some compensation for staff time needed.

Admin Before Incorporation	Keep the co-ops books	Quickbooks entries, billing, payroll, bill payments, reports, taxes.	Usually a 10% fee, open to barter.
	Be a fiscal sponsor for grants and tax-deductible donations	For mission-based work / charitable purposes.	Usually a 10% fee, open to barter.
	Open a commercial bank account for co-op	Using Roots' EIN, can have a co-op member as signer	Usually included in above.
	Open credit accounts with vendors	Needs Roots board approval	Usually included in above.
	Insurance coverage	Liability, workers comp and vehicle. Van, tools, copier/other office equipment	At cost (many activities would not increase liability costs and therefore be \$0). Workers comp is based on salary of compensated employees and the risk factor of their roles.
	Use of Roots equipment	Where there is close mission-match and/or co-op has grant potential but low fundraising capacity	Some compensation for staff time needed.

Managerial Support During Startup	Work with a first manager	Set up systems, day-to-day managerial support	Some compensation for staff time needed.
	Participate in collectives' planning meetings	Work along side horizontal co-ops in startup phase.	Some compensation for staff time needed.
	Roots staff member act as interim manager	Max 2 years. Accountable to both Roots board/membership and co-op	Considerable compensation for staff time needed