

# Cultural Needs Assessment and Toolkit for (Housing) Cooperatives

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## Instructions:

1. Set aside 2-3 hours to work through this assessment. Answer the questions individually or in small groups first, then reflect on your responses together as a large group.
  2. Rate the cooperative's effectiveness in each area on a 1–5 scale:
    - 1 = Needs urgent attention
    - 3 = Adequate but could improve
    - 5 = Thriving/Strong
  3. Add notes, examples, or recommendations in the space provided.
  4. Use the [Summary](#) section at the end to identify key themes and priority areas for action.
  5. Refer to the Supportive Tools listed at the end of each section for tips and guidance on facilitating deeper collective work in each area.
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## 1. Foundation & Environment (Site and Grounds)

Question	Rating (1–5)	Notes / Examples / Recommendations
Is the co-op's mission, vision, and values clear and visible to members and the wider community?		
Does the surrounding environment (neighborhood, political, economic) support the co-op's stability?		
Are member rights, responsibilities, and boundaries clear and respected?		
Is there a welcoming onboarding process for new members (orientation, mentorship)?		
Are power, resources, and responsibilities fairly distributed?		
Is training and co-learning on key skills and frameworks used by the co-op available and accessible to all members?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

*Supportive Tools:* [Anti-Racist Facilitation Guide to Co-op Development - Solidarity Resource](#), [Culture Design Canvas - Gustavo Razzetti of Fearless Culture](#), [Ownership Model Canvas - Start.coop](#), [SWOT vs PEST\(LE\) Analysis - Lucidchart](#), [Theory of Change - Beautiful Trouble](#)

## 2. Public Image & Communication (Building Exterior)

Question	Rating (1–5)	Notes / Examples / Recommendations
Does the co-op present itself authentically to neighbors and the broader community?		
Are public-facing communications (website, social media, bulletin boards, signage) transparent and open (if important)?		
Do external commitments (sustainability, affordability, inclusion) match internal practices?		
Is the co-op's identity strong, consistent, and welcoming?		
Are there visible “cracks” in unity (disunity, stress under pressure)?		
<b>Area Rating (Average)</b>	—	out of 5

*Supportive Tools:* [Vision, Values, and Voice: A Communications Toolkit - The Opportunity Agenda](#), [Build Your Own Message - The Opportunity Agenda](#), [Ethical Storytelling Principles - Voices of Witness](#)

## 3. Shared Norms & Relationships (Interior Common Areas)

Question	Rating (1–5)	Notes / Examples / Recommendations
Do shared spaces promote respect, cooperation, and care?		
Are co-op rituals and traditions maintained (meetings, shared meals, work days, etc.)?		
Is emotional safety present in meetings and group decisions?		
Are conflict resolution processes accessible and trusted?		

Does the co-op repair cultural “wear and tear” before it becomes “structural damage” (conflict, inequity, burnout)?		
Do members share responsibility for upkeep and cooperative life?		
Are lessons from past “repairs” (conflict resolution, transitions, big decisions) integrated into current practices?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

*Supportive Tools:* [Creative Interventions Toolkit - Mimi Kim](#), [Culture Design Canvas](#), [Developing Community Agreements - National Equity Project](#), [Guidance Notes on Cooperative Values & Principles - International Cooperative Alliance](#), [In It Together Toolkit - Dragonfly Partners & Interrupting Criminalization](#)

#### 4. Member Autonomy & Belonging (Individual Units)

Question	Rating (1–5)	Notes / Examples / Recommendations
Do members feel seen, heard, and valued?		
Are diverse needs (family, financial, cultural, accessibility) respected and addressed?		
Is there a balance between respecting privacy and encouraging participation?		
Do members have autonomy and tools to contribute meaningfully?		
Are feedback loops in place for individual input and growth?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

*Supportive Tools:* [Check-In and Check-Out Questions - Hyper Island](#), [Conflict Management Style Self Assessment - Namberjo Consulting](#), [Ecosystem of Well-Being - Solidarity Is](#), [Free & Low Cost Resources - Spring Up](#), [Manual of Me - Foxlark Strategy Ltd.](#), [Organization Health Check - Sociocracy for All](#), [Personal & Collective Noticing Tool - Prosocial World](#), [Pods & Pod Mapping Worksheet - Mia Mingus](#)

## 5. Governance & Operations (Mechanical Systems)

Question	Rating (1–5)	Notes / Examples / Recommendations
Are decision-making structures clear, democratic, and equitable?		
Do communication channels (meetings, email, boards) flow well?		
Are policies and bylaws up-to-date and inclusive?		
Are there regular “check-ups” on cooperative health (surveys, audits)?		
Is collective energy (financial, emotional, operational) used efficiently?		
<b>Area Rating (Average)</b>	—	out of 5

Supportive Tools: [Cooperative Bylaws and Other Governance Documents - Sustainable Economies Law Center](#), [Decision Making Matrix - Solidarity Resource](#), [Free Resources - The Hum](#), [Governance Design Worksheet - Upside Down Consulting](#), [Operating System Canvas 2.0 - Aaron Dignan](#), [The Ready \(Fillable Template\)](#), [Organization Health Check](#), [The Decider App - NOBL Collective](#)

## 6. Ethics & Accountability (Safety and Code Compliance)

Question	Rating (1–5)	Notes / Examples / Recommendations
Are ethical standards clearly defined and upheld?		
Are accountability practices functioning effectively?		
Are there clear, restorative systems for handling harm/conflict?		
Are marginalized or vulnerable members protected and empowered?		
Is there ongoing education about inclusion, consent, accessibility, and equity?		
<b>Area Rating (Average)</b>	—	out of 5

Supportive Tools: [Conflict Culture Assessment Worksheet - The Wildfire Project](#), [Core Design Principles Assessment Tool - Prosocial World](#), [In It Together Toolkit](#), [Standards for Excellence Self-Assessment](#)

## 7. Support Structures & Resources (Utilities and Infrastructure)

Question	Rating (1–5)	Notes / Examples / Recommendations
Is emotional and care work recognized and supported?		
Are financial practices transparent and sustainable?		
Is time and labor equitably shared?		
Are supports in place for burnout, conflict, or crises?		
Do members have access to resources (training, tools, tech) to succeed?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

Supportive Tools: [About Open Book Management - Zingerman](#), [Fair Pay Calculator - Namberjo Consulting](#), [Ecosystem of Well-Being](#), [Free Tools - The Great Game of Business \(books\)](#), [Resistance in Practice - Joy as Resistance](#)

## 8. Long-Term Vision & Viability (Health, Efficiency & Sustainability)

Question	Rating (1–5)	Notes / Examples / Recommendations
Are there supports in place to prevent cultural ‘erosion’ — like member disengagement or mission drift?		
Does the co-op adapt its “blueprints” (rules, norms, practices, strategy) as member and community needs change?		
Is there space for both legacy (history, founding vision) and innovation (new ways of living together)?		
Is there a rhythm of renewal — times for rest, reflection, and celebration to keep the culture vibrant?		

Does the co-op's culture welcome joy, creativity, and celebration?		
Are succession and leadership development systems in place and functioning well?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

Supportive Tools: [Culture Design Canvas](#), [OS Canvas 2.0 \(Fillable Template\)](#), [Succession Planning Policy - Cooperatives UK](#)

## 9. Institutional Memory & Learning (Documentation Review)

Question	Rating (1–5)	Notes / Examples / Recommendations
Is the co-op's history documented and accessible?		
Are lessons from past challenges integrated into practice?		
Are roles, agreements, and decisions recorded and revisited?		
Do member orientation materials include information about shared history, traditions, practices, policies & agreements?		
Are norms and practices open to revision based on new learning?		
<b>Area Rating (Average)</b>	—	<b>out of 5</b>

Supportive Tools: [Behavioral Anchors Tracker - NGL Community](#), [Co-op Decision Log & Task Planner - Namberjo Consulting](#), [Meeting Notes Template - Namberjo Consulting](#), [Templates - Sociocracy for All](#)

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**End of Questionnaire**



**Overall Rating & Summary:**

Focus Area	Avg Rating	Notes (Patterns & Themes)
<a href="#">Foundation &amp; Environment</a>	—	
<a href="#">Public Image &amp; Communication</a>	—	
<a href="#">Shared Norms &amp; Relationships</a>	—	
<a href="#">Member Autonomy &amp; Belonging</a>	—	
<a href="#">Governance &amp; Operations</a>	—	
<a href="#">Ethics &amp; Accountability</a>	—	
<a href="#">Support Structures &amp; Resources</a>	—	
<a href="#">Long-Term Vision &amp; Viability</a>	—	
<a href="#">Institutional Memory &amp; Learning</a>	—	
<b>Overall Rating (Sum)</b>	—	<b>out of 45</b>

**Priority Focus Areas & Next Steps:**

List the focus areas with the lowest scores (up to 5 total) in order of priority (highest to lowest). Use your summary notes to set measurable goals for how you will improve in each area within the next 3 to 6 months -or- before your next culture audit. Learn more about objectives and key results (OKRs) here: <https://www.atlassian.com/team-playbook/plays/okrs?tab=about-this-play>

Priority Focus Area	Rating	Improvement Goals (OKRs)
		Objective: <ul style="list-style-type: none"> <li>Result 1:</li> <li>Result 2:</li> <li>Result 3:</li> </ul>
		Objective: <ul style="list-style-type: none"> <li>Result 1:</li> <li>Result 2:</li> <li>Result 3:</li> </ul>
		Objective: <ul style="list-style-type: none"> <li>Result 1:</li> <li>Result 2:</li> <li>Result 3:</li> </ul>

Priority Focus Area	Rating	Improvement Goals (OKRs)
		Objective: <ul style="list-style-type: none"> <li>Result 1:</li> <li>Result 2:</li> <li>Result 3:</li> </ul>
		Objective: <ul style="list-style-type: none"> <li>Result 1:</li> <li>Result 2:</li> <li>Result 3:</li> </ul>

## Emergency Support Service Providers

Need help mediating an internal conflict or navigating a reported harm? Check out these organizations for support with mediation, consultation, staff training, and/or group facilitation:

<i>For Organizations &amp; Organizers</i>	<i>For Individuals in Crisis</i>
<a href="#">AORTA</a>  <a href="#">Interrupting Criminalization</a>  <a href="#">Lumos Transforms**</a>  <a href="#">Spring Up</a>	<a href="#">Liberatory Wellness Network</a>  <a href="#">NAMI Helpline</a> Call 1-800-950-NAMI (6264) or Text “NAMI” to 62640  <a href="#">Reclaiming Our Own Transcendence (ROOT)</a>
** Lumos also provides support for individuals	

*This tool was developed by Amber N. Jones of Namberjo Consulting and Shala Massey of Every Step, LLC for participants in the NASCO Institute 2025 session titled “[We Can Fix This](#)”: [Repairing Harm and Resourcing Resilience in our Co-ops](#). Feel free to adapt and share this document with others for non-commercial purposes with appropriate attribution:*

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