

# Planning for turnover

# Let's get started

- Enter your name and pronouns by clicking the three dots in the upper righthand corner of your Zoom square
- Mute yourself when you're not speaking by clicking the microphone button
- Please join us on camera if able
- Questions - Raise your hand to join stack or drop your question in the chat

# Checking in

Let's check-in using the chat window!

- Name, Pronouns, Co-op
- Access Needs
- Land Recognition

# Why plan for turnover?

Co-ops are intended to continue to serve their mission beyond any member term or staff tenure

Planning for turnover supports your co-op's mission into the future

Providing a structure for new leaders to step into gives them tools to be effective quickly

Providing context for how their term fits into longer projects gives them tools to make lasting impacts

# Long-term planning

The co-op's projects and needs won't always wrap up in your term and this is ok

Reports on long-term strategic plans and action steps make it possible for the next board to continue those plans

Avoid endless project; clarify project timelines and milestones from the beginning

# Member turnover

# Set the tone before move-in day

Co-ops are designed to let members move in and out, and need each year's members to feel at home and able to get involved

Many members will not have previous co-op experience - and may have little experience living independently. Expectations are being set before move-in, be aware of what new members expected because of your process and messages!

Use a voice that reflects the co-op in written materials used in outreach and in narrative explanations of orientation materials shared with new members

# Member turnover checklist - Member experience

- Orientation packet
  - Member policies (labor, conflict, member responsibilities)
  - Member resources (education, maintenance, food, etc.)
  - FAQ
  - Links to member resources or co-op records
- Tours and introductions
  - Show where all of the basic features are - where to get food, do laundry, find info, and more
  - Contact info for officers and staff with areas of responsibility for each
  - Especially in larger houses consider sharing a roster or a photo board with names and rooms
- Move in buddy or membership coordinator
  - Overview of labor system
  - Introduction to co-ops for new cooperators
  - Explain current community agreements for conduct and how they can be revised



# Set the right expectations

New members may compare the co-op to a conventional landlord, a family household, or other experiences that don't quite match

*Professionalism in formal process*

*Conduct of staff and officers*

*Clarity on who to approach for what and how*

# Member turnover checklist - Administrative

- Lease / membership contracts are signed and filed
- Required info filed with contract
  - income verification in affordable housing co-ops
  - proof of student status in student-specific co-ops
  - demographic info that may be required by lenders or funders
  - other information required in co-op policies
- Exit survey / check out sheet
  - Capture concerns and recommendations
  - Option to be added to alumni mailing lists or social media groups
- Add new members to communication lists
- Add new members to labor and food systems

# Create an environment that works for your co-op

*Have a calendar for recruitment that fits your local housing market or campus calendar*

*Have terms for leases meant to compare favorably to other housing (price, flexibility, member control, services and amenities, or others depending on your business model)*

*Give members ways to be involved in setting the tone for recruitment to recognize their work and insights and to have a process that speaks to the perspective of future members*

# Make member turnover predictable

- Year long leases (or a standardized length)
  - Incentivize giving the co-op notice of early move out so the co-op can plan for vacancies
  - Align the lease end dates with the housing market so vacancies come at good times
  - If you offer flexible leases consider qualifications for who gets one or a limit on how many
- Create a recruitment calendar
  - Membership drive season
  - Promotional specials
- Incentivise members to participate in finding new members
  - Referral credits
  - Credits for members giving tours according to approved standards
  - FAQ documents and templates to help any members / interns involved in recruitment

# Learning from turnover

*The purposes of exit surveys (learn from experienced members, spot problems in an honest format, track issues over time)*

*Making exit surveys easy to return (KISS)*

*Make exit surveys useful to departing members (why should I fill this out?)*

*Make exit surveys useful to the co-op (what do we do with all this?)*

# Example exit survey

Where Appropriate: Please rate the following from 1 to 5

1 = Unsatisfactory   2 = Moderate   3 = Satisfactory   4 = Good   5 = Excellent

1. How was your experience at Mysterious Pines Co-op? \_\_\_\_\_
2. How was the physical state of your house and room? \_\_\_\_\_
3. How would you rate the level of cooperation between members of your house? \_\_\_\_\_
4. How effectively were maintenance issues in your house dealt with? \_\_\_\_\_
5. How well did the meal plan meet your needs? \_\_\_\_\_
6. How effectively did information regarding the Co-op reach you? (ie. Meeting Times, Co-op Policies, Events, Fines, etc.) \_\_\_\_\_
7. How did you find the system of obligations at the Co-op: (Chores, Committees, Meetings) \_\_\_\_\_
8. How were the staff at the central office? \_\_\_\_\_
9. What would you like to see improved at the Co-op? \_\_\_\_\_
10. Where and how do you think the Co-op should be advertising? \_\_\_\_\_
11. Would you recommend the Co-op to a friend? Why/Why not? \_\_\_\_\_

# Board and officer turnover

# Leadership development

- Empower members to participate in board activities throughout the year by:
  - Making board meetings open and accessible to members
  - Communicating with members about board projects
  - Creating a pathway for members to impact board work
- Any member can participate in leadership of the co-op and no member can be a leader at all times
- Share the work of leading the co-op so that no one member is overwhelmed



# Planning for turnover

(Officers/Directors)

Consider an overlap period where newly elected officers/directors shadow the previous ones

Co-ops sometimes use rotating terms of office to share skills and round out experience

Co-ops with high member turnover often have community board representatives that carry institutional knowledge and a different stakeholder perspective

# Planning for turnover

(Officers/Directors)



Co-ops may also set term limits or cooldown periods to give new members a chance to run and prevent siloing of information

Co-ops sometimes have officer roles elected by the membership rather than appointed within the board or have officers that are not board members

All of these methods have to balance exposure to new roles and voices against the need for stable experienced member leadership

# Board Turnover checklist

- Board duties and Officer descriptions
- Change codes and passwords with board turnover to prevent inappropriate access to records
- Board onboarding manual
  - Annual gov. calendar with routine board tasks
  - Long term project reports/ updates
  - Code of conduct
  - Co-op policies

# Officer descriptions

Include officer descriptions in board director orientation material to encourage accessibility and engagement. Use clear language and avoid jargon / acronyms to make the document more helpful to newer members.

Have an exit survey to share with all departing board members. Include questions on the clarity of officer job descriptions to get insights for whether the positions need to be adjusted.

# Example Maintenance Officer Job Description

## SKILLS

A successful co-op maintenance officer must be:

- **Observant.** Pay close attention to changes in the physical well-being of your co-op house.
- **Action-oriented.** You must be capable of making decisions and taking action.
- **Accountable.** You must competently report maintenance issues, projects, and receipts for expenditures to your co-op, and you must be able to hire and supervise plumbers, electricians, carpenters, etc., when needed.
- **Organized.** You must be able to prioritize maintenance needs to ensure that problems are prevented or addressed using budgeted funds. You must be capable of planning and organizing co-op-wide maintenance work holidays.

# Example Maintenance Officer Job Description

## REQUIREMENTS

- Participate in quarterly maintenance assessment tour of your house
- Work with co-op members to prioritize maintenance needs, with an eye towards preventing maintenance problems when possible.
- Perform minor maintenance tasks, and teach other co-op members how to perform those tasks.
- When tasks fall beyond the skill-level co-op members, consult with staff for instruction and hire appropriate outside contractors to perform the job.
- Complete monthly maintenance report to co-op, working with the treasurer to monitor maintenance expenditures and adjusting maintenance budget or projects according to available funds.
- Coordinate co-op work holidays, organizing co-op members for a day or weekend of cleaning, preventive maintenance, and repair work at least once per school term.

# Example Maintenance Officer Job Description

## REWARDS

The maintenance officer position is a tremendous educational and skills-developing opportunity. After serving as a maintenance officer, you will possess extensive skills not only in building maintenance but in organizing groups of people, planning, decision-making, business leadership, and cooperation. You will be entirely capable of obtaining employment with a general contractor, in an office, or in a public service position.

This position is awarded 5 hours per week of labor credit.

# Planning for turnover

Consistency in personnel oversight for boards



Boards inherit a responsibility to oversee and direct management staff

Effective oversight needs continuity to work, the board should prepare reports to orient new directors on documented staff goals, requirements, or ongoing disciplinary status

Personnel records need confidentiality, and new board members need those records - plan for how to transfer access (including digital or hard copies)

Make sure former board members no longer have access to confidential records



# Staff turnover

# Staff Handbooks & Manuals

Co-op staff often wear multiple hats and interact with several systems within the co-op.

Providing a staff handbook and staff manual helps to reduce the influx of information for new staff and serves as a centralized resource they can return to again and again.

# Staff Handbook

Includes:

- ❑ Co-op mission statement, values, and strategic goals
- ❑ Personnel policies, such as:
  - ❑ General employment policies and practices
  - ❑ Anti-discrimination policy
  - ❑ Anti-harassment policy
  - ❑ Staff evaluations policy
  - ❑ Compensation policy
  - ❑ Employee benefits policy
- ❑ Processes and procedures

# Personnel policies

- Hiring
  - Who? Hiring committee, board, GM or other staff
  - What? Job description, staff responsibilities
  - When? Plan for overlap
- Firing
  - Who? Board, personnel committee, GM or other staff
  - How? Based on evaluation, annual review, end of contract
- Oversight
  - Who? Board president, staff liaison, supervisor or other staff?

# Staff Manual

Likely to be specific to each position and should include:

- ❑ Detailed how-to for each aspect of the job
- ❑ Important contacts that need to be maintained
- ❑ Breakdown of daily, weekly, monthly, and yearly tasks

# Staff turnover checklist

## For incoming staff

- Email accounts
- Phones
- Admin access
- Assigning equipment
- Staff handbook and/or manual
- HR paperwork

## For outgoing staff

- Exit surveys
- Shutting off accounts
- Returning equipment

# Discussion

# Discussion questions for your co-op

- What type of turnover happens most frequently at your co-op?
- How does your co-op currently handle turnover?
- Where does institutional knowledge currently live in your co-op?
- If your co-op experienced 100% board turnover would your co-op be prepared?
- If your co-op experienced 100% staff turnover would your co-op be prepared?
- If your co-op experienced 100% membership turnover would your co-op be prepared?



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# Thanks!

