

# Driving On Purpose;

# Ethical enterprise and democratic business ownership models shaping who's at the wheel

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**TEAM FOSTERING**  
*Putting Children's Futures First*

 **CO-OPERATIVE & COMMUNITY FINANCE**  
the lender for social purpose

 **CASA**  
CARE AND SHARE ASSOCIATES



WHO IS AT THE **WHEEL?**

# WHO SHOULD BE AT THE **WHEEL?**

WHO/WHAT IS **WHO**?

# WHO/WHAT IS **LEADERSHIP?**

# Who Is At The Wheel?





Who Is At  
The  
Wheel?



Who Is At  
The  
Wheel?

# Who Is At The Wheel?



# Who Is At The Wheel?



# Who Is At The Wheel?



# Who Is At The Wheel?



# Who Is At The Wheel?



- Fly 70% Further
- Work for common good
- Honk
- Take turns
- Look after each other

# AND WHAT ABOUT PURPOSE?

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Who Is At The Wheel?

# CASA's Antecedents

## Phases Of Development

- 1976 – Little Woman
  - Fun, Ideological, & Values Based
  - Small loan/Sweat Equity
- 1993 – Sunderland HCA
  - Fun, Ideological, & Values Based
  - Small grant/Sweat Equity
  - Contract – straight-forward/guaranteed
- 2004 – Care & Share Associates
  - Fun, Ideological, & Values Based
  - Sweat equity & Complex mix of grants and loans
  - Contracts – Complex procurement process
- 2010 – CASA One
  - Fun, Ideological, & Values Based meets quasi commercial investment

# CASA In Context; Key Performance Indicators (2017)

- Vision: A Beacon Of Employee Ownership; A Game Changer In Health & Social Care
- A Leading UK Employee Owned Social Enterprise
- Delivery of 24,000 Hours Of Support Per Week
- Quality - CQC – Hold 5 ‘Goods’ & 1 Uninspected
- Operates Across 9 Territories
- Employ over 1,000 CASA Owners
- Current run rate; £17m





# CASA's Theory Of Change

- Engaged Employees Deliver Higher Quality Care
- Financial Transparency To All Stake Holders
- Mutuality Is Key To Innovation

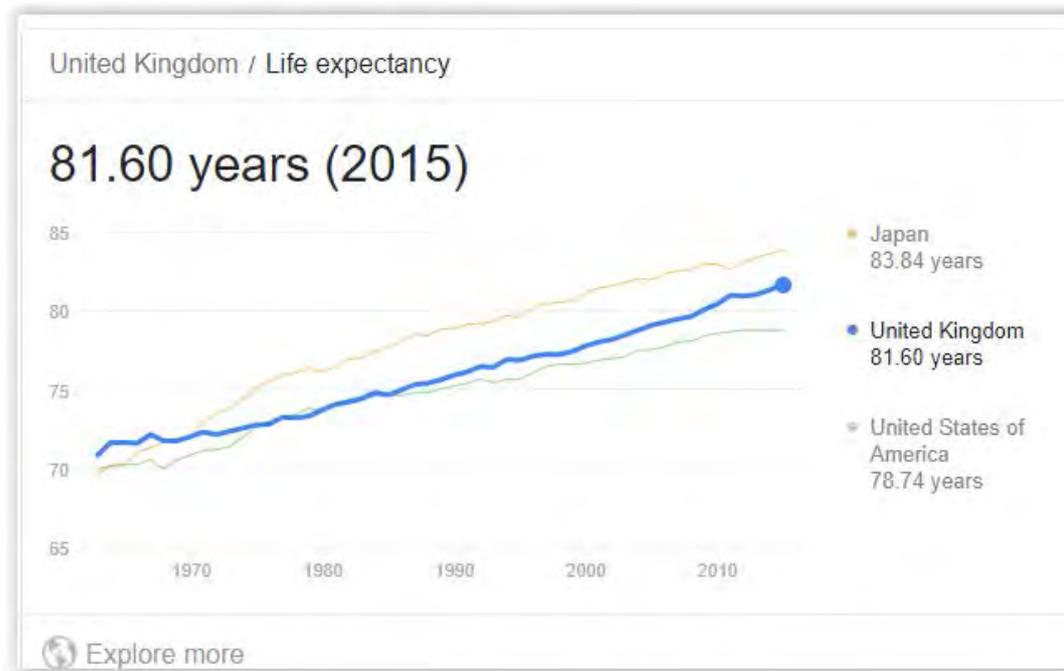


# Why Is This Important?

- 1948/NHS Born – Life Expectancy 66 years/ now 81 (Oz = 82)

UK – Health vs Life Span

- 19 Million Over 65s by 2050
- 8 Million Over 80 by 2050
- 1 in 4 of us NOW need help with daily living



# Current UK Context

- Financial Crash & Public Austerity
- Market 'Failure' In The Health & Social Care Sector;
  - £2.6Bn Funding Hole
  - The Demographic Reality/Increasing Demand
  - Increased cost pressures – National Living Wage
  - 90,000 plus vacancies in the NHS alone

# Power Of Co-operation Case Study; Health & Social Care







# Auslan interpreter shortage 'getting worse with NDIS rollout'

By Claire Campbell

Posted Tue at 9:40pm



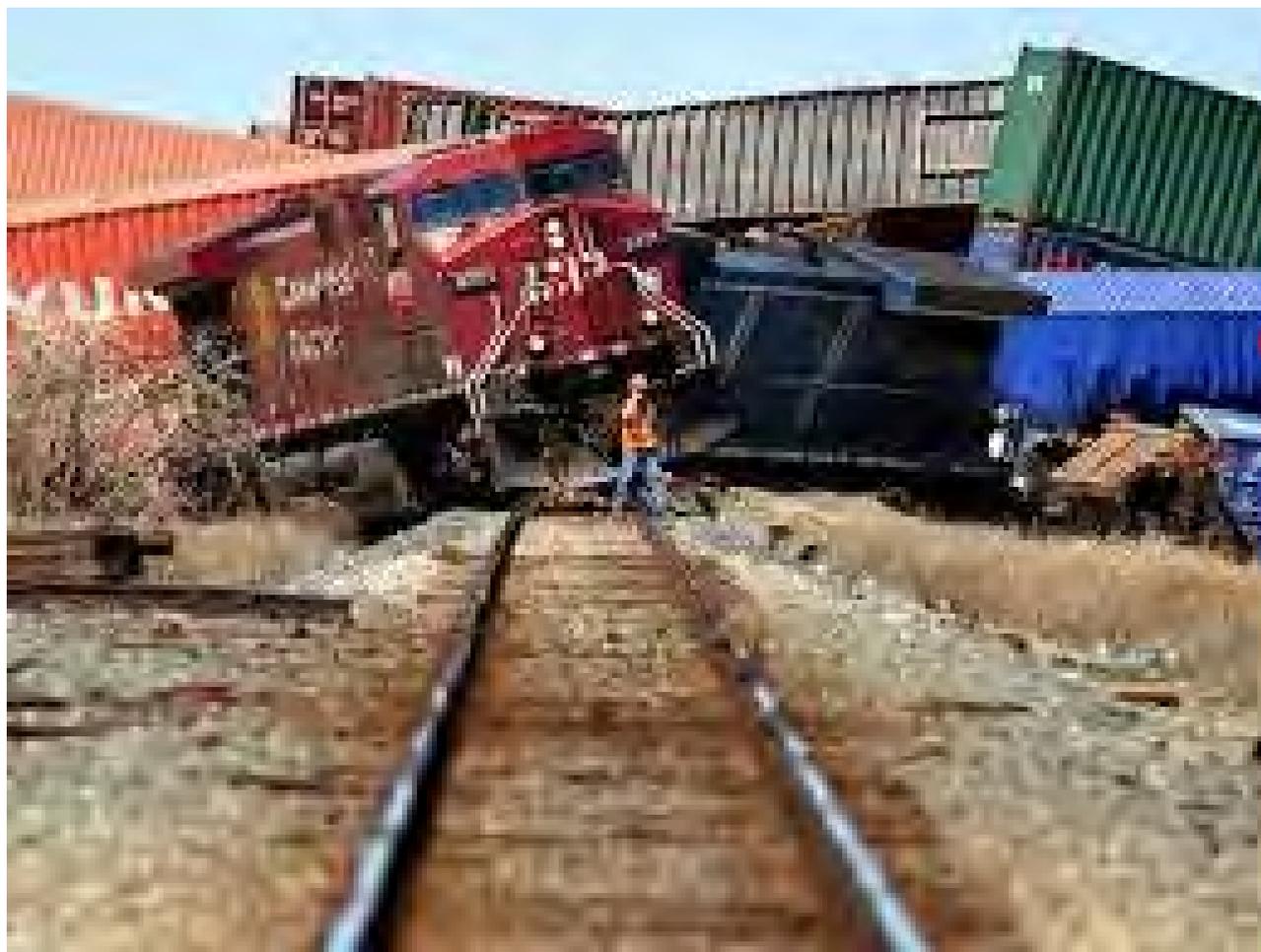
PHOTO: Brenton Peters and Deaf Can: Do's Debbie Kernew using AUSLAN to communicate. (ABC News: Claire Campbell)

Deaf people in South Australia are reporting they are regularly forced to cancel medical appointments, delay court hearings or miss work meetings due to a dire shortage of Auslan interpreters.

[RELATED STORY: Auslan classes take off in the regions — with the help of a dedicated mum](#)

[RELATED STORY: The 'Sign Guy' delivering emergency messages to the deaf community](#)

All Of Our  
Responsibility  
To Realise  
NDIS 10 Year  
Ambition



# Relevant Co-operatives Approaches In The Health & Social Care Sector

- Genuine Employee Engagement Through Ownership
- Consumer Owned & Controlled
- Marketing/Secondary Producer Co-operatives
- Hybrid/Multi Stakeholder/Buurtzorg/Self-managed teams

# CASA's Mutual Response

- Workforce & Enterprise Are Key – Create CASA Careers
- No Financial Leakage
- Profit motive & Incentivisation work
- Financial accounting is open and transparent to all – employees, service users, and commissioners all able to see where the money goes and why – Realistic Returns
- Efficient – A commercial and enterprising approach is the CASA default position..
- Co-production – we need to move away from the traditional commissioner provider split, to where all stakeholders get together to work out what's best.

# 1938

## THE SHEARD'S BUILDING THAT WOULD BECOME THE CO-OP

Co-operatives have had a presence in the Australian economic and social landscape since the 1850s. A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations, through a jointly owned and democratically controlled enterprise.





WE WANT TO MAKE  
OUR COMMUNITY  
A GREAT PLACE  
TO LIVE.

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OUR PURPOSE IS  
TO NOT ONLY  
PROVIDE THE  
BEST SHOPPING  
EXPERIENCE  
POSSIBLE BUT  
TO ALSO ENABLE  
THE COMMUNITY  
AS WHOLE TO  
PROSPER.



**18,000**  
MEMBERS



OPERATING  
SINCE  
**1944**

SUPPORTING  
**OVER 100**  
COMMUNITY  
ORGANISATIONS



OVER  
**\$2.85M**  
IN MEMBER INSTANT  
DISCOUNTS &  
BONUSES AT  
THE REGISTER



**\$66M**  
TURNOVER



MEMBER  
OWNED



**\$2**  
SHARE



SUPPORTING  
**REGIONAL**  
EMPLOYMENT

**\$37M**  
REDEVELOPMENT  
PROGRAM



OVER  
**\$100,000**  
SPONSORSHIP  
& DONATIONS



SHOPPING CENTRE  
OWNER WITH  
**38 OUTLETS**



OVER  
**350**  
STAFF



## Sticky Money – The Co-op

The Co-op Foodland's revenue in 2013 was \$48 million. Approximately \$25 million of this commercial value is recycled through local suppliers, employees, members and the community to create human, intellectual and natural and social and relationship capital. For every dollar spent at The Co-op Foodland, an additional 76 cents of total value is created for the Nuriootpa region – we call this Sticky Money.



# STICKY MONEY \$1.76

Sticky Money, Ernst & Young 2014

*the* CO-OP  
HEART OF THE BUSINESS

# HELPING OUR COMMUNITY PROSPER



HEADING  
TOWARDS THE  
FINISH LINE

STAGE 1  
Business Case

STAGE 2  
Concept Design  
and Project Brief

STAGE 3  
DA Documentation

STAGE 4  
Development Consent

STAGE 5  
Tender and Award

STAGE 6  
Delivery and Handover



# Australian Co-Operative Sector Snapshot



THERE ARE AT LEAST

**2,135**

active CMEs in Australia



AUSTRALIAN CMES HAVE A TOTAL

**29 MILLION+ MEMBERS**



AUSTRALIA'S CMES PROVIDE

**\$140 BILLION**

in Total Value Added to Aus economy



TOTAL REVENUE OF TOP 100 CMES IS

**\$30 BILLION**

excluding superannuation funds



COMBINED THEY HAVE MORE THAN

**\$713.6 BILLION**

in gross assets



TOTAL CME GDP IS

**8.3%**

as a percentage of Australia's GDP



ARE EMPLOYERS OF

**146,000 EMPLOYEES**



CORE BUSINESS SUPPORT FOR OVER

**174,000 BUSINESSES**

including 13,610 farmers and fishers



# Co-operatives and Mutual enterprises are businesses owned by or governed to benefit their members.

Co-operatives are autonomous associations of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise – *International Co-operative Alliance*



A defining feature of co-operatives is their democratic value.

They are owned and controlled by their members.

## International Co-operative Principles

1. Open voluntary membership
2. Democratic member control
3. Member economic participation
4. Autonomy and independence
5. Education, training and information
6. Co-operation among co-operatives
7. Concern for community

## Legal models

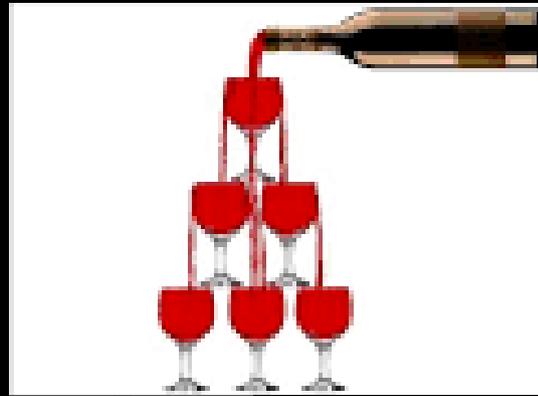
1. Co-operative National Law (unified/state based)
2. Incorporated Association Act (State)
3. Corporations Act (FP/NFP/Federal)



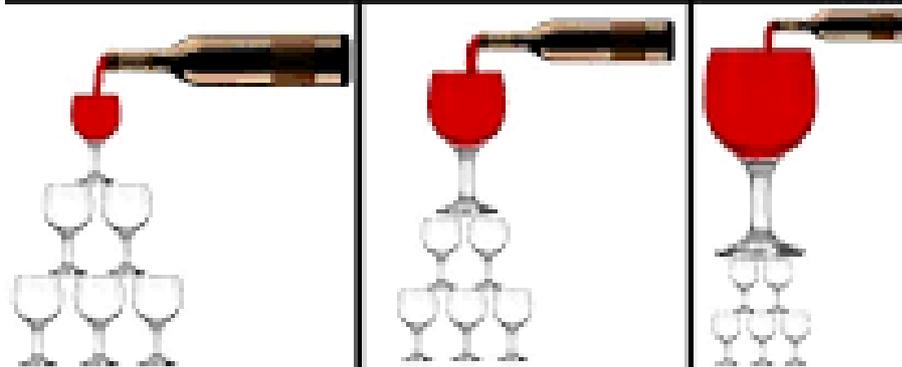
# Ownership Matters

## Trickle down economics

How we're told it works



What actually happens





# THE OWNERSHIP EFFECT

[www.theownershipeffect.co.uk/](http://www.theownershipeffect.co.uk/)

## Concerns

UK productivity continues to underperform

HM Government is concerned about standards of corporate governance, low worker influence and engagement, and defaulting public service conglomerates

Regional government and business leaders are concerned about business succession resilience and economic growth

## Co-op Solutions

Improving UK productivity

Resilient regional economies

More engaged employees

Addresses business succession issues

Improves strategic scrutiny

Strongly appeals to millennials



# What Do You Want?

- Disabled People
- Families
- Commissioners
- Providers
- Value For Money
- Security
- Safety
- Quality

# Multi-Stakeholder Co-ops

## Benefits

- Co-production – not top-down professional control
- Economic democracy – for users and workers
- Community development – assets and added value
- Collaboration

## Stakeholders

- Disabled People
- Families
- Providers
- Workers
- Commissioners

# European Scale & Ambition; Italy

- First organised in the early 1970s, social care co-ops were formed by care-givers and families to provide services to the disabled that were not available from the state.
- • Over 6,700 co-operatives provide social care, health and employment services in Italy – arguably the most extensive and successful programme of mutualisation anywhere in the world.
- Employ over 244,000 staff
- T/o over €1.3 billion/13% of Italian expenditure for social services.
- In Bologna, over 85% of the city's social services are provided through social care co-ops.

# Realising The Co-operative Ambition; The Co-operative State

- Clear co-operative and mutual models - organisational forms that can be recognised by procurers;
- Access to finance
- Specialist business support;
- Long-term commissioning;
- Enabling legislation – Social Value Act/Health & Well-Being (Wales) Act/ Tax Incentives (Italy) ;
- Links to the wider co-operative and mutual business sector;
- Create ‘Sectoral Development Body’?

# **ALL OF US AT THE WHEEL**

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