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## Engaged Learning: Mutual Benefits for Course Instruction and Extension Program Deliver

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### Abstract

Engaged learning projects can effectively complement Extension programming goals and course learning objectives that enrich the outcomes for both components. A cooperative business management class at Cornell University provides an evaluation of the fundamental principles, structure, finance, and governance associated with the cooperative business model. In so doing, students analyze contemporary issues facing modern cooperatives. In collaboration with extension programming surrounding cooperative enterprises, contemporary issues are emphasized through projects with actual cooperative businesses. Cooperatives have included farmer-owned, customer-owned, and worker-owned businesses. Students benefit from applying principles learned in class, while cooperatives benefit from the fresh, new perspectives they receive from people outside their organization. Both value the highly interactive nature of this engagement and to which work plans and expected deliverables can and often do change throughout the course of the projects. This paper synthesizes the opportunities and obstacles associated with developing and administering engaged learning projects from the learned experiences of the class instructor, professional Extension staff, and cooperative industry clients. Recommended best practices are elucidated to better inform faculty interested in implementing this dynamic approach to extension and classroom education.

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### **Abstract**

Engaged learning projects can effectively complement Extension programming goals and course learning objectives that enrich the outcomes for both components. A cooperative business management class at Cornell University provides an evaluation of the fundamental principles, structure, finance, and governance associated with the cooperative business model. In so doing, students analyze contemporary issues facing modern cooperatives. In collaboration with extension programming surrounding cooperative enterprises, contemporary issues are emphasized through projects with actual cooperative businesses. Cooperatives have included farmer-owned, customer-owned, and worker-owned businesses. Students benefit from applying principles learned in class, while cooperatives benefit from the fresh, new perspectives they receive from people outside their organization. Both value the highly interactive nature of this engagement and to which work plans and expected deliverables can and often do change throughout the course of the projects. This paper synthesizes the opportunities and obstacles associated with developing and administering engaged learning projects from the learned experiences of the class instructor, professional Extension staff, and cooperative industry clients. Recommended best practices are elucidated to better inform faculty interested in implementing this dynamic approach to extension and classroom education.

**Key Words:** cooperatives, engaged learning, extension programming, undergraduate teaching,

**JEL Codes:** A22, D70, J54, P13, Q13

## 1 Introduction

The advantages of engaged learning to improving student outcomes are increasingly being recognized and implemented in academic settings as a distinguishing characteristic of learning in higher education today (Bowen 2005, Middlecamp 2005, Hammerlink and Plaut 2014, Avila-Linn et al. 2021). This pedagogy may be particularly emphasized and/or rewarded at public institutions and Land Grant universities, where engagement, service learning, and a public purpose are often codified in their institutional objectives (Jacoby and Musascio 2010, Mehta et al. 2015). Arguably, extension program delivery is as much out-of-classroom teaching as it is an engaged learning activity. The ability to connect extension programming and classroom (student) instruction provides an opportunity for enhancing the mutuality of teaching and extension.

Despite the emerging emphasis on engaged learning, it is often interpreted differently depending on the focus of engagement; i.e., the engagement with whom or with what and in what context (Bowen 2005). For example, utilization of business simulation software as a part of or in addition to course instruction can be interpreted as engagement with a learning process or object of study. Guest speakers and case studies can be another form of engaged or experiential learning, where ‘real life’ examples of firm decision-making can be illustrated as they relate to course concepts, but generally occur over a relatively short time period (e.g., one class period).<sup>1</sup>

Community-engaged learning is also a term used to describe this pedagogy, particularly when community is defined more specifically to groups or organizations associated with various constructs of communities and service learning (e.g., school boards, city councils, municipal committees or agencies, food pantries, non-profit organizations, or other public initiatives).

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<sup>1</sup> The term “experiential learning” is commonly used to describe this form of teaching pedagogy, but is arguably a more general term to account for various forms of experiences. For our use, where interaction and shared learning with a client are emphasized, we prefer “engaged learning.”

Learning takes place in and with communities, where diverse skill sets from universities (i.e., faculty, staff, and/or students) work collaboratively with community members to address the issue or issues of relevance to them. Regardless of the terminology, engaged learning includes working with and learning from a community partner (generally defined) that connect and integrate community-engaged experiences with educational content (Einhorn 2021).

We define engaged learning specifically as a tool by which students take the concepts they learn in the classroom and apply them to a ‘real-world’ issue through ongoing and interactive engagement with a firm, community group, or other client. In this way, engaged learning projects are different from traditional student projects, more comparable to business consulting than an end-of-semester project or paper. As such, they require special attention, dedication, and mindfulness to be personally and professionally successful. When done right, engaged learning is win-win-win: clients find resolution on issues that matter to them, faculty infuse their teaching, extension, and research with diverse perspectives and ways of knowing, and students learn in new and exciting ways that build a greater sense of belonging (Einhorn 2021). In this way, engaged learning projects can effectively complement extension programming goals and academic course learning outcomes.

Below we describe the experiences of an ongoing engaged learning effort that combines an undergraduate course on cooperative business management with ongoing extension programming on enhancing the competitiveness of cooperatively structured business. We synthesize the opportunities and obstacles associated with developing and administering engaged learning projects from the learned experiences of the faculty instructor, professional extension staff, and cooperative industry client. We close with recommended best practices and practical

applications to better inform faculty interested in implementing this dynamic approach to extension and classroom education.

## **2 The Class**

Cooperative Business Management (AEM 3260/5260) has been taught at Cornell since 2013, with engaged learning projects commencing in 2017.<sup>2</sup> The course provides an evaluation of the fundamental principles, structure, finance, and governance associated with cooperatively structured businesses, with an emphasis on agricultural cooperatives. Analyses of the cooperative business organization within the modern economy are emphasized through a mix of lectures, case study discussions, and engaged learning projects.

Learning outcomes are assessed each year based on class performance and student reflections. Specifically, students will be able to do the following by the end of the semester: (1) identify economic justifications for the cooperative as a business entity, (2) illustrate unique characteristics of the governance, finance, and management of cooperative businesses, and (3) analyze contemporary issues facing modern cooperatives, with an emphasis on the challenges and opportunities facing cooperatives that compete with investor-owned firms.

An extensive reading list is curated annually from academic, industry, and extension resources. Several texts are also used to demonstrate the uniqueness of the cooperative business model (i.e., Boland 2017, Zeuli and Cropp 2004, Merrett and Walzer 2004, Cobia and Anderson 2000). While emphasizing agricultural cooperatives, students from across majors and colleges at the University enroll, including both undergraduate and graduate students (MS, MPS, and MBA). While standalone cooperatives courses are more familiar in Land Grant institutions, there is not a single business school in the country that offers one. Student grades are established based

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<sup>2</sup> A “cooperatives” course was taught previously by faculty but was inactive for a number of years prior to 2013. The current course syllabus is included with the online supplementary files (as Appendix 1 for submission).

on three exams (50%), case study presentations (17%), and engaged learning projects (33%). Engaged learning projects contribute strongly to final course grades (i.e., equivalent to 1.5 exams). This is not only an indication to students to take the work seriously, but also to the projects' ability to contribute strongly to student learning and long-term value.

In engaged learning projects, students apply principles learned in class to contemporary issues facing real cooperatives. Faculty and extension staff work with cooperative industry stakeholders prior to the beginning of the semester to develop general project parameters and proposed deliverables. Students self-select into projects, subject to reallocation by the instructor. Groups are finalized emphasizing the value of diversity across several characteristics (e.g., class year, background, major, gender, career interests, etc.). Students work directly with their cooperative client to develop a timeline of work, set up meeting schedules, and formulate specific project deliverables. They need to be organized and efficient in their work and respectful of the time with their client.

Students must sign and adhere to a *Student Engagement Agreement* that establishes minimum expectations.<sup>3</sup> The agreement emphasizes respectful discourse, active listening, confidentiality, and leadership. In addition to the course instructor, an Extension Associate, and student teaching assistants (TAs) provide significant human capital resources to help the students and client navigate the journey. Regular meetings with the students' assigned TA and instructor are required. The cooperative client also receives *Client Guidelines* that clarifies their expected time commitment, roles, and tips to successful student collaborations.<sup>4</sup>

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<sup>3</sup> The current version of the *Student Learning Agreement* is included in the supplementary online materials (as Appendix 2 for submission).

<sup>4</sup> The current *Client Guidelines* document is included in the supplementary online materials (as Appendix 3 for submission).

Given the nature of these projects, grades are not assigned based on the specific deliverables they develop with their client. While the general nature of deliverables are established prior to the semester, the specific nature, content, and format of deliverables are developed collaboratively between the client and students throughout the semester. Accordingly, grades are largely process-based; i.e., how well students worked with their client and with other students, and the level of attention, leadership, and contributions to defined deadlines. Formally, grading is based on the quality of their final written report and class presentation, peer assessments, and client feedback. How well they follow the *Student Learning Agreement* is another tool utilized in setting final project grades.

### **3 The Extension Program**

Cornell's Cooperative Enterprise Program (CEP) was founded in 1982 as an Extension program in response to the financial stress of agricultural cooperatives during the 1980s farm crisis.

Today, the mission of the CEP is to enhance the performance of existing cooperative businesses and facilitate the development of emerging cooperative enterprise through teaching, research, and extension programming. Specifically, the objectives of the CEP are to:

1. Develop effective, action oriented, knowledgeable and ethical directors, managers, future leaders and members of cooperatives who can help their organizations survive, grow and benefit members,
2. Assure access to program participation by all groups of individuals interested in the cooperative form of business, including those interested in starting new organizations,
3. Offer learning experiences that emphasize current and future needs and solutions to the business issues facing cooperatives,



4. Provide undergraduate and graduate student educational opportunities on the cooperative business model and strategy through interaction with cooperative industry firms, and
5. Highlight Cornell's resources with Northeast cooperatives as well as support cooperative education with other agricultural institutions.

The third and fourth objectives of the CEP align seamlessly with engaged learning projects involving students and cooperative industry partners. Through the Program's efforts, it strives to strengthen the leadership skills of current and aspiring cooperative leaders and enhance understanding of cooperatives as a means to improve the socio-economic well-being of citizens and communities, foster scholarship, and nurture respectful, diverse, and trusting relationships and networks among students, academics, policymakers, and the public. CEP staff include a full-time Executive Director (Extension Associate), Faculty Director, Administrative Assistant, and undergraduate and graduate student research, extension, and teaching assistants.

As part of its current activities, CEP staff provide cooperative leadership training for the Northeast Cooperative Council (NECC), a nonprofit member organization of agricultural cooperatives headquartered or doing business in the Northeast United States.<sup>5</sup> The mission of the NECC is to stimulate the overall effectiveness of member organizations by increasing the understanding of the power of the cooperative business model among directors, members, employees, managers, advisors, and educators through a working partnership of cooperative leaders and faculty at Cornell University. Through funding support of the NECC for CEP programming, the Executive Director of the CEP also serves as the Executive Secretary of the NECC. Access to and involvement with university students is important to and valued by the

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<sup>5</sup> Current NECC members include Dairy Farmers of America, Upstate Niagara Cooperative, O-AT-KA Milk Products Cooperative, Agri-Mark, Ocean Spray Cranberries, Dairy One Cooperative, Lowville Farmers Cooperative, Genex/CRI, Farm Credit East ACA, Yankee Farm Credit ACA, CoBank ACB. Additional Associate Members represent a number of industry, legal, accounting, and cooperative development firms.

NECC and its members. The regular interactions and collaborations with NECC cooperative members provide ready access for their interest and involvement in engaged learning projects.

#### **4 Learned Experiences**

Since 2017, 28 projects have been completed involving 19 different cooperative, cooperative development, and cooperative professional service firms.<sup>6</sup> Cooperatives have included farmer-owned, customer-owned, and worker-owned businesses. Local and national cooperatives have participated, including five listed on the National Cooperative Bank's 100 largest cooperatives in the United States (NCB 2021). Project topics have ranged from cooperative development feasibility analyses, financial analyses of equity management and patronage refund programs, member education, director education, and governance issues of all flavors.

Projects are curated considering application of course concepts and needs of the cooperative client. They must be feasible to complete within the course of one semester. While cooperative businesses have existing and emerging issues that cross business types (e.g., market influences, regulatory compliance, product development), projects must be 'co-opy'; i.e., reinforce course objectives so as to contribute to learning outcomes. We summarize the projects, by year, below and note the evolution of project administration from the learned experiences and input received by the faculty, extension staff, students, and cooperative clients.

The first year of projects started relatively small – three projects with one cooperative business (Table 1). The cooperative assigned separate staff to work with the student groups based on their ongoing work with the cooperative. Student learning agreements were not yet established, nor were there written client guidelines. Initial project descriptions were relatively short (4-5 sentences), leaving students much liberty in envisioning project deliverables with their

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<sup>6</sup> Project descriptions and general deliverables for each year are available from the authors upon request.

client. Too little direction likely contributed to slow initial progress; however, the largest barrier to project advancement accrued to the high number of students assigned to each project group (8) and difficulty in finding common meeting times. Project mentoring was limited to the instructor (i.e., no Extension Associate nor TAs were yet involved). Particularly advantageous to project progress was the cooperative’s local location and the ability of clients to meet in-person, as necessary.

**Table 1. Engaged learning projects: clients, topics, and deliverables, 2017.**

Client	Co-op Type	Topic(s)	Deliverables
GreenStar	Consumer	Community solar	<ul style="list-style-type: none"> <li>• Review of alternative community solar models</li> <li>• Construction cost estimation and funding options</li> <li>• Timeline of important events, potential obstacles</li> </ul>
GreenStar	Consumer	Revisions to patronage refund policy	<ul style="list-style-type: none"> <li>• Member information flyer</li> <li>• Financial modeling spreadsheet</li> <li>• <a href="#">YouTube promotional video</a></li> </ul>
GreenStar	Consumer	Cooperative business expansion	<ul style="list-style-type: none"> <li>• Financial projections, alternative scenarios</li> <li>• Financing options</li> <li>• Recommended next steps</li> </ul>

Growing course enrollments and a desire to reduce group size resulted in six projects in 2018 (Table 2). Improved outreach to cooperatives, including NECC members, increased the number of cooperatives participating. Issues associated with member participation in cooperative leadership roles, member communications, and financial management topics were included. Informed from the prior year’s projects, and with the assistance of the University’s Office for Engagement Initiatives, a *Student Learning Agreement* was developed and implemented. Given additional time demands for more projects, the Executive Director of the CEP and one TA took on roles for project mentoring and client communications in collaboration with the course instructor. Outputs in written forms through handouts, fact sheets, and promotional materials were common; interactive, online, and audio/video products were also developed. In-person

meetings with clients were preferred and, for clients more distant, course staff worked with clients and students to arrange at least one in-person meeting on campus during the semester.

**Table 2. Engaged learning projects: clients, topics, and deliverables, 2018.**

<b>Client</b>	<b>Co-op Type</b>	<b>Topic(s)</b>	<b>Deliverables</b>
GreenStar	Consumer	Member engagement, leadership	<ul style="list-style-type: none"> <li>• Board survey on leadership motivations</li> <li>• Member survey on leadership and self-awareness</li> <li>• Infographic on self-awareness and leadership</li> <li>• Promotional materials on member involvement</li> </ul>
Ocean Spray	Farmer	Member education, board trust	<ul style="list-style-type: none"> <li>• Industry analysis</li> <li>• Member education materials</li> <li>• <a href="#">Rap video on cooperative governance</a></li> </ul>
Upstate Niagara	Farmer	Equity management	<ul style="list-style-type: none"> <li>• Comparative peer analysis</li> <li>• Board educational handout</li> <li>• Recommendations to board of directors</li> </ul>
Upstate NY Growers & Packers	Farmer	Member communications	<ul style="list-style-type: none"> <li>• Marketing agreement revisions</li> <li>• Online inventory communications</li> <li>• By-laws revisions</li> </ul>
Eden Valley Growers	Farmer	Pricing, participation requirements	<ul style="list-style-type: none"> <li>• By-laws revisions</li> <li>• Non-member business protocols</li> <li>• Member participation, equity requirements</li> </ul>
National Grape, Welch's	Farmer	Member participation, leadership	<ul style="list-style-type: none"> <li>• Informational brochure</li> <li>• Educational video and program series outline</li> <li>• Member education stipend proposal</li> </ul>

The interest of cooperatives to take part in engaged learning with students was increasingly evident in 2019 (Table 3). Some cooperatives participated more than once providing sound empirical evidence of their value to cooperative stakeholders. Student enrollments continued to grow, in large part to student enjoyment of the projects as a new way to learn – word was spreading. Two TAs and the Extension Associate now provided project administration support. Member education and governance efforts continued to be important topics, but issues of risk management, supply control, and feasibility of new cooperative efforts were gaining traction. Improving time management skills to the projects was emphasized during the semester and students were increasingly utilizing distance communication methods. Five to six projects

per year was maintaining group sizes to no more than four or five students and reducing (albeit not eliminating) conflicts for students in assembling group meetings.

**Table 3. Engaged learning projects: clients, topics, and deliverables, 2019.**

<b>Client</b>	<b>Co-op Type</b>	<b>Topic(s)</b>	<b>Deliverables</b>
Upstate NY Growers & Packers	Farmer	Marketing agreement, risk mgt.	<ul style="list-style-type: none"> <li>• Member survey and analysis</li> <li>• Governance changes, capital reserve plan</li> <li>• Member marketing requirements</li> </ul>
National Grape, Welch's	Farmer	Supply control, heterogeneity	<ul style="list-style-type: none"> <li>• Industry analysis</li> <li>• Comparative peer assessment</li> <li>• Next steps to address of member heterogeneity</li> </ul>
Railroad Ave. Supply Company	Worker (new)	Governance, worker education	<ul style="list-style-type: none"> <li>• Employee handbook</li> <li>• Director responsibilities handout</li> <li>• Governance scenario exercises (scripted)</li> </ul>
Dairy Farmers of America	Farmer	Board size and composition	<ul style="list-style-type: none"> <li>• Summary of member, management interviews</li> <li>• Comparative peer assessment</li> <li>• Proposed board changes</li> </ul>
Ocean Spray	Farmer	Equity mgt., member education	<ul style="list-style-type: none"> <li>• Comparative peer assessment</li> <li>• Interactive member equity training guide</li> <li>• FAQ guide/glossary for members</li> </ul>
Capital District Co-op	Farmer	Cooperative marketing	<ul style="list-style-type: none"> <li>• Market research – institutional customers</li> <li>• Membership survey and analysis</li> <li>• Member communication recommendations</li> </ul>

Specific issues of member heterogeneity via marketing and equity agreements surfaced in 2020, along with projects focused on new cooperative development; i.e., worker and farmer cooperatives (Table 4). To help students in their selection of preferred projects, clients participated in short (15 minute) project presentations at the beginning of the semester in class (via Zoom) and answered questions from students. Unfortunately, by early March, issues surrounding the Covid-19 pandemic were growing, students were sent home and classes were paused as instruction shifted to online. Adding in the abrupt change to business operations of our clients necessitated substantial revision and downsizing of deliverables. The need to enhance effective communication and project progress through virtual means was apparent.

**Table 4. Engaged learning projects: clients, topics, and deliverables, 2020.**

<b>Client</b>	<b>Co-op Type</b>	<b>Topic(s)</b>	<b>Deliverables</b>
Eden Valley Growers	Farmer	Member heterogeneity	<ul style="list-style-type: none"><li>• Member survey</li><li>• Proposed governance changes</li></ul>
Ithaca Farmers Market	Farmer, Vendor	Member engagement, communication	<ul style="list-style-type: none"><li>• Member interviews – full, associate, non-member</li><li>• Communication platform changes (social media, brochure, website)</li></ul>
OWN Rochester	Worker (new)	Organization planning	<ul style="list-style-type: none"><li>• Employee handbook development: ESOP explanation, roles and responsibilities of worker-owners</li><li>• Governance, business scenario exercises (scripted)</li></ul>
Tongore Brook Farm	Farmer (new)	Feasibility assessment	<ul style="list-style-type: none"><li>• Cooperative needs assessment survey and analysis</li><li>• Recommended next steps</li></ul>
Upstate NY Growers & Packers	Farmer	Marketing agreements, heterogeneity	<ul style="list-style-type: none"><li>• Industry analysis</li><li>• Member survey and analysis</li><li>• Draft marketing agreements, by-laws revisions</li></ul>

Due to the ongoing Covid-19 pandemic and online-only instruction, the 2021 engaged learning projects focused internally on developing online learning modules for the CEP useful for extension programming delivery (Table 5). Each student group was tasked to develop a learning module that can be used to inform members, directors, and employees of cooperatives, and assigned an industry mentor (i.e., a cooperative director, manager, or service provider) to help guide their project, provide insight, and ground truth their outputs. Students learned about core concepts and competencies related to cooperatively structured businesses in class and then provided their own interpretations (with assistance and feedback from their client and mentor) on how to educate others. Since all students were working with one client on a set of learning modules, coordination both within and across the project teams was important (and challenging). Dedicated class time and office hours were used to share project progress, address common linkages, and provide consistency across group products. The deliverables from those projects

are currently in editing for use in an aggregate online platform of the CEP by the end of 2022.

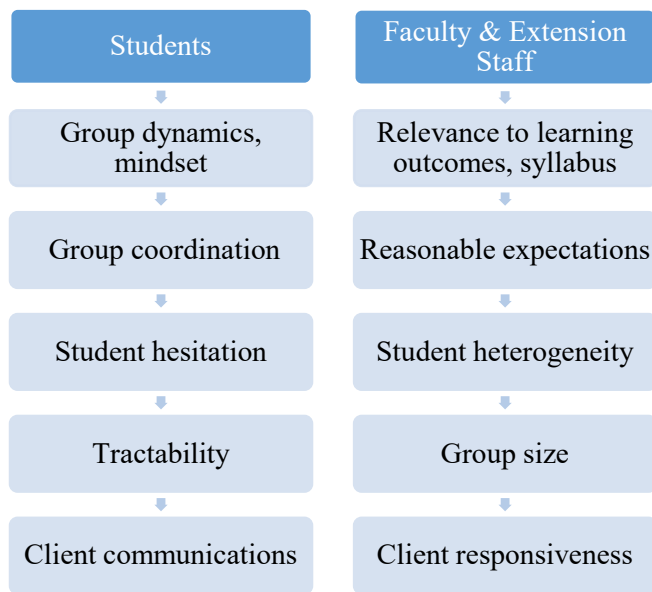
Modules will be used, in whole or in part, in in-person and online extension programming.

**Table 5. Engaged learning projects: clients, topics, and deliverables, 2021.**

<b>Client</b>	<b>Mentor</b>	<b>Topic</b>	<b>Content areas</b>
Cooperative Enterprise Program	Attorney, Bond, Schoeneck & King	Choosing the right business model	<ul style="list-style-type: none"> <li>• Differences in business models</li> <li>• Traditional and hybrid cooperatives</li> <li>• Steps in forming a new co-op</li> </ul>
Cooperative Enterprise Program	Former Director, Dairy Farmers of America	Responsibilities of members, directors, and managers	<ul style="list-style-type: none"> <li>• Fiduciary responsibilities</li> <li>• Board composition</li> <li>• Director training</li> </ul>
Cooperative Enterprise Program	Former CEO, St. Albans Co-op Creamery	Understanding and using financial statements	<ul style="list-style-type: none"> <li>• Financial statements</li> <li>• Differences by co-op function</li> <li>• Financial ratios</li> </ul>
Cooperative Enterprise Program	Relations Manager, CoBank, ACB;	Choosing a member equity management plan	<ul style="list-style-type: none"> <li>• Sources of equity</li> <li>• Alternative equity programs</li> <li>• Choosing the right plan(s)</li> </ul>
Cooperative Enterprise Program	Certified Public Accountant, Dopkins & Co.	Managing profits (and losses) in your cooperative	<ul style="list-style-type: none"> <li>• Managing and distributing returns</li> <li>• Member, nonmember business</li> <li>• Income taxation</li> </ul>
Cooperative Enterprise Program	Former Chair, Farm Credit East, ACA	Board evaluation	<ul style="list-style-type: none"> <li>• Board alignment</li> <li>• Choosing the right Board Chair</li> <li>• Board and director evaluation tool</li> </ul>
Cooperative Enterprise Program	Director, Farm Credit East, ACA	Hiring and evaluating the CEO	<ul style="list-style-type: none"> <li>• Developing a position description</li> <li>• Evaluating performance</li> <li>• Succession planning</li> </ul>
Cooperative Enterprise Program	Principal, Stamm Advisory Group	Positioning the cooperative for future success	<ul style="list-style-type: none"> <li>• Cooperative life cycle</li> <li>• Strategic planning</li> <li>• Cooperative restructuring</li> </ul>

## 5 Obstacles

Figure 1 illustrates the obstacles to address to ensure successful engaged learning projects, unique to but related among students, faculty and extension staff. The learned experiences are importantly informed by (required) student reflections and (requested) client feedback on the projects; i.e., what worked well, what didn't, and recommendations for improvement.



**Figure 1. Obstacles to successful engaged learning projects: student and faculty, Extension staff perspectives.**

### 5.1 Student Obstacles

Engaged learning requires considerable interaction among fellow students and their client that emphasize active listening, respectful discourse, and student leadership for particular deliverables. Accordingly, poor group dynamics stymie project development and hinder client interactions. Students are generally resistant to work through troublesome dynamics upfront, preferring rather to ‘change groups.’ Group coordination is related to dynamics in that students often find difficulty in finding common meeting times and a resistance to adapt their current personal schedule to accommodate group academic work.

For students, engaged learning projects represent a very different kind of group project. A student mentality of pushing things off until the last minute and then cramming to finish the project regularly surface. That strategy may work for traditional classes, but it is not consistent



with an engaged learning approach and can water down the benefits engaged learning provides and the resulting deliverables to clients.

Students are often nervous or hesitant to initially approach their project client, commonly senior management personnel or cooperative board members. They are concerned that they don't know enough about cooperative businesses to have a conversation and don't want to look 'stupid'. Indeed, student apprehension to the initial labeling of these projects as 'consulting' projects was quickly replaced with terminology focused on 'engagement' emphasizing co-learning of clients and students.

Historically, few clients have been local enough whereby in-person communication serves as the primary communication mode. Even with local clients, clients and students are busy such that finding frequent in-person meetings throughout a semester is, at best, difficult and, perhaps, unnecessary.

## 5.2 Faculty/Extension Staff Obstacles

Engaged learning projects, as other course elements, must contribute to the course's learning outcomes. In so doing, projects need to apply course concepts through specific client contexts to be 'co-opy.' A project focused on developing a new consumer marketing campaign for a food product is great for a marketing class, but perhaps not for one focused on cooperative business management, even if the firm is a cooperative. Designing projects that provide value to the client irrespective of the course are relatively easy, ensuring that the projects simultaneously reinforce learning outcomes requires additional thought and discussion.

The projects developed must have reasonable expectations given the defined project duration (within a semester) and time commitment, along with other course demands. It does no good to anyone to develop a project that will realistically take at a year to complete for a one-

semester course. Relatedly, faculty extension staff must consider the timeline of course projects with the timeline of course concepts as defined in the syllabus. Students will be apprehensive to begin work on a project if the underlying concepts have yet to be covered in the classroom.

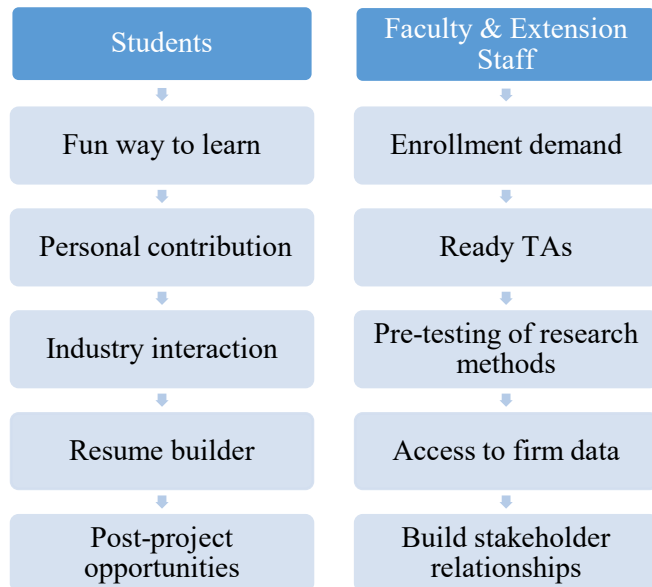
Heterogeneity among students assigned to groups is advantageous to bring forward multiple perspectives and accentuate the value of diversity, but may also cause unnecessary disruptions to project progress. Differences in groups by class year, student major, and past experiences may contribute to problems with understanding of course concepts, group dynamics, and voluntary contributions of group members.

Expanding enrollments over time is a good sign of student interest and, without exception, is a plus in the eyes of university administrators. However, scaling project-based courses is difficult. For engaged learning, assigning the same project to multiple groups greatly increases the demand on clients that may be difficult, if not impossible, to replicate or differentiate across groups. Increased enrollments, with a commitment to limiting the number of students per group, necessarily implies developing more projects with more clients, thereby constraining the bandwidth of faculty and extension staff.

Some student groups perform well; others do not, much to the reasons identified above. While a commitment and dedication to engaged learning for students is important to project success, this equally applies to participating clients. Some clients have more time than others and some projects require more time than others. Failure of clients to constructively respond to student inquiries and in a timely fashion necessarily delays project progress and diminishes the value of engagement. Furthermore, often the only time students can get students together for a group call or video session with their client is late at night or on the weekends. Those are prime times for students to work and collaborate, but not for the client sponsor.

## 6 Opportunities

Figure 2 summarizes the opportunities to successful engaged learning projects, unique to but related among students, faculty and Extension staff. As with the obstacles identified above, they are importantly informed by student reflections and client feedback.



**Figure 2. Opportunities of successful engaged learning projects: student and faculty, Extension staff perspectives.**

### 6.1 Student Opportunities

Based on feedback and course evaluations, students regularly find the engaged learning projects to be the best part of the class. While figuring out group dynamics upfront is challenging, they appreciate mutual learning through peer interaction. In short, if they commit to the process, they find this is a fun way to learn. They also appreciate the ability to provide their own personal contributions to a group effort. Students are open to explore their own ideas, as encouraged by their peers and client, in addressing project objectives. Delineating responsibilities and

contributing to the group's collective efforts is rewarding to students. Affirmation by their client to their individual and collective efforts is doubly rewarding.

Without question, students appreciate applying concepts in 'real-time' with 'real-world' implications. Interactions with industry leaders through an engaged, beyond experiential, experience contributes to achieving course outcomes and long-lasting learning and application. It is not uncommon for students to include project work on their resumes to emphasize specific firm/industry interactions and products they developed for their clients. On occasion, post-project opportunities have emerged through continued work after the class has finished. The experience also gives students a unique advantage when applying for internship and employment opportunities.

## 6.2 Faculty/Extension Staff Opportunities

Engaged learning opportunities are appreciated and increasingly sought out by students. Conversations among students of engaged learning experiences promote continued enrollment. Positive experiences by non-graduating students also present informed, experienced TAs for the following year. Requests for TA openings are quickly satisfied (for credit or for pay) by prior students interested in participating in more engaged learning experiences, albeit with a different role. Any form industry engagement is valuable industry engagement for students.

Engaged learning projects are designed around contemporary issues and needs faced by cooperative businesses. As such, through students, they allow for pre-testing of industry/firm surveys and research methods. They can also provide access to firm and member data not available from other sources. Confidentiality and nondisclosure agreements are utilized, where necessary, but for most projects, confidentiality disclosures through the *Student Learning Agreement* are sufficient.

Finally, and most importantly, integrating engaged learning projects with extension stakeholders supports and builds relationships. Cooperatives appreciate and value the chance to work with students, students appreciate the chance to work with cooperatives, and faculty and extension educators find out, first hand, the most pressing needs and issues of their priority stakeholders. An important value for the cooperatives in participating is the ability to interact with students as proxies for new members of the cooperative, or a next generation of cooperative members who are just learning how the cooperative works. This allows the cooperative to test drive, refine and improve communication methods and messages to an audience who closely represents the knowledge base of these individuals who in one way or another are new to the cooperative. As an example, once client really enjoyed learning how students on their team would react when presented with a cooperative policy. The client would ask the students what they think it means and how it may be better communicated.

Class projects can advance larger applied research and extension initiatives that are known relevant to extension audiences based on prior engaged learning experiences. Accordingly, engaged learning projects in the classroom both inform and are informed by extension priorities and ongoing programming activities.

## **7 Recommended Best Practices**

We demonstrate how combining engaged learning of students with priority extension stakeholders enhances the learning for each internally, while also providing additional external benefits. Students benefit from applying principles learned in class, cooperatives benefit from the opportunity to work with students as potential future employees and for the fresh, new perspectives and input they receive from people outside their organizations, and faculty develop innovative ways to combine research, teaching, and extension responsibilities that enhances the

nature of their work. From the learned experiences of the class instructor, professional extension staff, and cooperative industry clients, we close with some recommended best practices to better inform faculty interested in implementing this dynamic approach to extension responsibilities and classroom education.

### 7.1 Emphasize commitment

Throughout the projects, reinforce that everyone has something to contribute, regardless of their beginning knowledge of cooperatives, in general, and the cooperative business itself, specifically. Emphasize that no one expects them to know the answers to the cooperative's issues on day one, nor is there necessarily just one 'right' answer. Indeed, part of the projects is to evaluate different options to address the issues and the positive and negative aspects of each. It is not for the students to decide what the cooperative should do, but to provide unbiased results of the research at hand that address the priority issues associated with the project. New ideas, programs, or policies may surface that the cooperative may never have thought of. The goal is to analyze what is best for the cooperative, given the data collected and the assumptions made. From the client's perspective, treating students as new members of the cooperative and asking them to come to the group with that mindset promotes buy in from students.

The impulse to accommodate requests to change groups early on needs dissuasion and to a focus on what's wrong with existing group dynamics and how they can be addressed and alleviated. Emphasizing to students that group projects and interactions are common in the workplace are useful to encourage them to find resolution as a career enhancing skill. Students should also be reminded that one part of engaged learning is learning from each other, which includes their clients and their peer students. Referring back to the *Student Learning Agreement* is often helpful.

Students should be reminded that their clients actually want to work with them given their willingness to be part of a course project and based on their interest in hearing students' outside perceptions of the issues the cooperative is facing. Engaged learning projects require consistent and dedicated effort, so tractability and assessment of progress is essential. Clients recommend to build in very specific deadlines to the project to keep a consistent effort level, and with implications if they are missed. Students that set up a work plan early on with their client that includes specific project deadlines and presentation of initial and revised deliverables are more likely to be successful. Identifying 'next steps' and assigned leadership of them at the end of each meeting guides progress between meetings.

Students must utilize multiple forms of communications (e.g., in person, phone, Zoom, email), regardless of client location to productively advance through their project. However, even one in-person meeting with the client (or a client representative) can be incredibly valuable to cement student understanding and engagement. Clients encourage a minimum of three in-person meetings during the project, when possible. Faculty and extension staff must be flexible to accommodate these interactions whenever possible; i.e., on campus, at the client location, or even somewhere in between. Ultimately, regular meetings with the client should be scheduled early and adhered to, with additional communication through written updates. Everyone's time is scarce, an upfront willingness to block out dates and times throughout the semester is essential.

Cooperative clients must also understand and accept a minimum level of time commitment, responsiveness, and involvement in working with their student groups, including some meeting times outside of normal working hours (e.g., evenings, weekends). When faculty teaching responsibilities are co-mingled with extension programming, this necessarily imparts extra attention by faculty and Extension staff in clearly communicating expectations up front.

The *Client Guidelines* document was developed over a course of years to help provide that framework and promote understanding and project value.

## 7.2 Project-Course alignment

Start early in promoting course projects with extension audiences. Provide examples of prior projects; oftentimes the same types of projects are relevant across prospective clients. Limit cooperative businesses to one project if there is only one client representative. Multiple projects with a cooperative business work well and can be efficient for project administration, but only if different client representatives are assigned to each. Discuss the possibility of sequential projects where the outputs of one project can be used as inputs to the next one the following year; doing so, provides long-term commitment to course participation. Share the course syllabus, *Student Learning Agreement*, and *Client Guidelines* with prospective clients early in your discussions. Work closely with them to develop projects that reinforce learning outcomes while also providing something of value to them. They must be win-win-win (student-client-faculty/extension staff).

Reinforce to students that work on a project can begin even if the underlying concepts of the project have not yet been formally introduced in the classroom. Early on, all projects require understanding the cooperative business, its operations, its objectives, and the industry it operates in. For example, cooperative finance projects can begin at the beginning of the semester, even though the finance section of the course does not start until mid-semester. Students are welcome to read ahead, get additional help from the instructor and TAs, and focus on other elements of the project until subjects are covered in class.

While one semester is a relatively short time to begin and complete an engaged learning project, resist the urge to assign students to projects right away. Allow for the natural ebb and



flow of student enrollments (adds and drops) to pass before student-client interactions begin. Abrupt changes to students in groups delays student group cohesion and project engagement with clients. Wait to assign students until after the ‘add’ deadline for a course. Design projects that are reasonable to complete within a semester. Remember, your class is not the only one students are taking. Encourage clients to provide short presentations to the class (Zoom works well) about their projects early in the semester on what they are looking for students to help them with. The personal connection helps student choose projects that best fits for them and eases their hesitation in reaching out to their clients later on.

### 7.3 Recognize human resource constraints

Engaged learning projects are incredibly rewarding when done correctly, but also require a large time commitment in and out of the classroom. If included as part of a class, as is AEM 3260/5260, assigned progress reports facilitate feedback for students and promote consistent progress (see *Student Learning Agreement* document). Additional support for instructors are essential. Particularly for projects involving extension audiences, extension professionals already familiar with prospective clients provide efficient facilitation of project development and candid, useful conversations with clients throughout the semester. TAs who have experienced engaged learning are seen as a valuable first resource to current students working through their own projects. Students are often willing to go to their TA for assistance before addressing it with the course instructor. TAs provide important intel for faculty and extension staff, so regular meetings with them are important.

Alternatively, consider a standalone engaged learning, projects-based course. Given the growing enrollments of AEM 3260/5260 and, thereby, the need for more projects (10 are planned for 2022), effective management of class instruction and course projects may be

infeasible within one-semester course. Since engaged learning projects apply course concepts to advance learning outcomes, an initial, more traditional course (without projects) can be administered followed by a projects-only course where the base course is a prerequisite. This may also be a useful strategy for faster, comprehensive project progress if a large proportion of students are unfamiliar with the core objectives and concepts of the course. A two-class sequence does not reduce the overall effort of faculty, but it does spread out the daily workload. University administrators must also recognize the unique and beneficial learning opportunities of engaged project-based learning, particularly when combined with extension responsibilities, and provide appropriate incentives for delivery and expansion, where feasible.

#### 7.4 Reinforce tipping points

Students must understand and take ownership of the project objectives rather than just learning about their particular client. Learning about the client is important, but it is just background information. To enhance the value that faculty, students, and clients get out of these projects is to acknowledge and plan for “tipping points” as the semester goes on. Early on, much of the communication with the client is one sided; i.e., from the client to the student. This is necessary in order to understand the operations and goals of the cooperative business and why the issues students will be working on are important to them. This should take around 2-3 weeks of dedicated effort, review of materials provided by the client, and meetings with them. In addition, some background information can be provided as a pre-read to initiating the project or to joining a particular team.

From there, students provide their initial, informed feedback to the client regarding data needs, methodologies to employ, and presentation forms of project deliverables. This is the first tipping point and, necessarily, one-sided; i.e., from the students to the client. Enough effort early

in the project should get students past this tipping point within another 2-3 weeks. This is not the final form of their deliverables, but rather a process they propose to the client to get them there.

After suitable time for the client to consider their initial efforts and react to their proposed activities moves the project past the second tipping point to two-sided communications. At this stage, regular interactions between students and client and sustained effort by students to the work plan propels the project to its final outcomes; i.e., the back and forth exchange of ideas, pivoting of effort, and revision of deliverables through consensus. Time management is crucial to allow enough time for exchange, review, feedback, and edits by the end of the semester.

#### 7.5 Utilize input and resources for continuous improvement.

Reflection by students on what worked well, what didn't, and how they would improve the projects looking forward serve as vital information for faculty in improving learning outcomes associated with the projects and promoting meaningful interactions and value to project clients. Accordingly, require student reflections are a necessary part of the engaged learning experience. As some students may be hesitant to provide critical advice to their instructor, reflections should be delivered anonymously to the instructor to better promote project improvements. Sharing student reflections with clients also helps promote long-term client participation.

There is a delicate balance between telling students what they need to do and allowing students the freedom to develop their own deliverables consistent with project ambitions. Some prefer the directed nature of the former, but the latter promotes ownership of deliverables and student buy-in to the process of engaged learning. Provide enough direction early on to get them moving, and then stand back and let them curate deliverables through engagement with each other and their client. Provide comprehensive and timely feedback to their questions. The limit to

the form of their products rests with the extent of their own imaginations and ideas, while grounded in course concepts and client engagement.

Finally, take advantage of existing resources. There is a growing literature on engaged learning far beyond the recommended best practices developed through our learned experiences (e.g., Avila-Linn et al. 2021, Mehta et al. 2015, Hamerlinck and Plaut 2014, Jacoby and Musascio 2010). Many Universities are expanding institutional efforts and encouraging engaged learning opportunities for students, faculty, and staff, regardless of formal faculty appointments. For Land Grant universities with formal extension commitments, utilizing campus and off-campus cooperative extension staff and resources can effectively contribute to student and client value. Reflections from extension clients on the value they received from the projects and how they can be improved for them is as vital as that from students. Doing so will effectively contribute to extension programming goals and promote long-term participation of extension stakeholders in and out of the classroom.

## 8 References

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Zeuli, K.A. & R. Cropp. 2004. *Cooperatives: Principles & Practices in the 21<sup>st</sup> Century*. A1457,

University of Wisconsin. Available at:

<https://cdn.shopify.com/s/files/1/0145/8808/4272/files/A1457.pdf>

### **Appendices: Supplementary Materials**

Appendix 1 Course Syllabus

Appendix 2 Student Learning Agreement

Appendix 3 Client Guidelines

## Instructor

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## Administrative Support

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## Engaged Learning Project Support

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## Teaching Assistants

**Anastasia Stampoulopoulou**, [as4245@cornell.edu](mailto:as4245@cornell.edu), Office Hours: TBD

**Connor Nugent**, [cln49@cornell.edu](mailto:cln49@cornell.edu), Office Hours: TBD

## Class Meeting Time & Location

Tuesdays and Thursdays, 08:05 – 9:20am in XX Warren Hall. A short asynchronous video primer ( $\leq 15$  minutes) for each lecture period will be posted to the Canvas course page within 24 hours of the scheduled class. For maximum learning, students should watch the lecture primer before each class. I encourage you to actively participate during class by asking questions and contributing to discussions. I will call on people to involve you as well. Trust me, the more you participate, the more you will learn, understand, and apply.

## Schmit Office Hours:

Thursdays, 1:00-2:30pm, or by appointment in person or via Zoom. Student groups should prioritize this time for professor meetings on their Engaged Learning Projects.

## Course Description

An evaluation of the fundamental principles, structure, finance, management, and governance associated with cooperatively structured businesses, with an emphasis on agricultural cooperatives. Analyses of the cooperative business organization within the modern economy are emphasized through a mix of lectures, case study discussions, and engaged learning projects. Additional industry engagement is expected of graduate students (GR) by developing cooperative business educational curricula and delivering to relevant stakeholder audiences in collaboration with the Cornell Cooperative Enterprise Program.

## Learning Outcomes

Students will be able to do the following by the end of the semester:

1. Identify economic justifications for the cooperative as a business entity (UG, GR);
2. Illustrate unique characteristics of the governance, finance, and management of cooperative businesses (UG, GR);
3. Analyze contemporary issues facing modern cooperatives, with an emphasis on the challenges and opportunities facing cooperatives that compete with investor-owned firms (UG, GR).
4. Understand how to develop tailored educational curricula and delivery methods appropriate to cooperative business stakeholders (GR).

## Grand Challenges Project Course

If you are a Dyson (AEM) undergraduate (UG) major, this course qualifies as a Grand Challenges capstone project. This is the culmination of your work in the Writing Course, your participation in the Pre-Project Immersion, and your entire Dyson experience. During the course, you'll apply everything you learned about yourself, about working as part of a team, about business, and about the world around you. More information is available on Dyson's Grand Challenges curriculum [website](#).

## Texts & Resources

1. Cobia, D.W. & B.L. Anderson (eds). 2000. Cooperatives: An Economic & Management Perspective. Download here from [Cornell Box](#).
2. Boland, M. 2017. An Introduction to Cooperation & Mutualism. Univ. of Minnesota Libraries Publishing. Download here from the [University of Minnesota Digital Conservancy](#).
3. Zeuli, K.A. & R. Cropp. 2004. Cooperatives: Principles & Practices in the 21<sup>st</sup> Century. A1457, University of Wisconsin. Download here from [University of Wisconsin Extension](#).
4. Merrett, C.D. & N. Walzer (ed). 2004. Cooperatives & Local Development: Theory and Applications for the 21<sup>st</sup> Century. Arnonk, NY: M.E. Sharpe, Inc. 1 copy on reserve @ Mann Library.
5. Harvard Business Publishing cases (HBP): After setting up an account, students can download cases from the [HBP Coursepack link](#). Students responsible for cost of cases (\$4.25 each, total cost = \$34). If financially constrained, reach out to professor directly for remediation.
6. Other readings as assigned (see Course Calendar).

## Passkey

Use Passkey to access readings (journal articles) not publicly available, but available through the Cornell library system. See instructions for loading Passkey on your computer at this link: [Passkey Info](#). Next time you hit a restricted website, click the Passkey icon. If the Library has a subscription to the resource you are trying to access, you will be prompted for your NetID. If that does not work, look up the article through the [Cornell Library](#).

## Academic Integrity

Each student in this course is expected to understand and abide by the Cornell University [Code of Academic Integrity](#). Any breach of the academic integrity code will be considered grounds for failure in the course.

## Prohibition of Buying and Selling Course Materials:

Course materials posted on Canvas are intellectual property belonging to the author. Students are not permitted to buy or sell any course materials without the expressed permission of the instructor. Such unauthorized behavior constitutes academic misconduct.

## Students with Special Needs

All necessary coursework accommodations will be provided to students with documented disabilities. For guidelines, see the website for [Student Disability Services](#). Please let me know of any special needs well in advance.

## Regrades

Any questions regarding grading of assignments or exams must be submitted in writing to the instructor no later than 48 hours after the assignment/exam has been returned. You should note how many points you are contesting and why. Instructor will carefully consider all re-grade requests within 3 business days.

## Classroom Respect & Inclusion

Having an educated perspective involves understanding and respecting individual differences. We tend to base our judgments on our own experiences. To understand the world beyond ourselves requires being open to the experiences of others, particularly those who have a significantly different perspective. Diversity of experience can include anything from being raised in another country or even in another part of the U.S., or it can relate to differences in age, ethnicity, race, religion, sexual orientation, gender identity, or many of the other ways in which we are all unique. Sharing your perspective is encouraged and will make this class a richer experience. Respect for others and understanding of differences is essential. As such, you can expect from your professor and classmates respect for your perspective and opinions.

Through our courses, student organizations, and University activities, we are presented with many opportunities to explore new and challenging issues. Some of these issues are familiar to us and some of them are not. We hope



that through honest, open, and sincere dialogue and meaningful interaction with others we will introduce, extend, increase, and/or change our understanding of different people and their perspectives. Our conversations and interactions may not always be easy and may lead to discomfort for you or others around you. We will sometimes make mistakes in our communication with one another, in both speaking and listening; we will sometimes need to exercise patience, or courage, or imagination, and many other qualities in combination to ensure we respect each other's differences and similarities, both inside and outside of the classroom.

We will always need to maintain respect for others' experiences and viewpoints, and strive to deepen our understanding of diverse perspectives. Just as you are obligated to respect others' perspectives, you deserve that same respect in return. You all belong here and if any incident occurs that challenges our commitment to maintaining a supportive and inclusive environment, please let your course instructor or a member of the University administration know of your concerns so appropriate actions can be taken to ensure a diverse and inclusive environment. Anyone who uses personal pronouns (mine are he/him/his) or names other than is indicated by the class roll should inform the professor and know that will be honored.

## Grading Structure

The baseline grading scale is: A (-/+) if points  $\geq$  90%, B(-/+) if  $80\% \leq$  points  $<$  90%, C (-/+) if  $70\% \leq$  points  $<$  80%, D(-/+) if  $60\% \leq$  points  $<$  70%, and F if points  $<$  60%. I reserve the right to curve the grading on individual components or in aggregate. A grade of A+ is only awarded for students with points in excess of total points (i.e., requires strong performance and extra credit points).

<b>Graded course components</b>	<b>UG Points (%)</b>	<b>GR Points (%)</b>
Exams (3 @ 100 each)	300 (50.0%)	300 (42.9%)
Case study presentation	50 (8.3%)	50 (7.1%)
Case study day attendance (5 @ 10 points each)	50 (8.3%)	50 (7.1%)
Engaged Learning Project (report/deliverables @ 150, presentation @ 50)	200 (33.4%)	200 (28.6%)
Extension curriculum development & delivery		100 (14.3%)
<b>Total</b>	<b>600 (100%)</b>	<b>700 (100%)</b>

## Attendance

Attendance in class is expected and material to your benefit in better understanding concepts and topics. That said, attendance is only taken and required for course points on case study presentation days. Active participation by students is expected on all class days (e.g., asking questions, providing comments). Doing so provides a more beneficial, interactive, and engaged learning environment for our individual and collective benefits!

## Exams

There will be three prelim exams covering the material discussed in class. They are open book and administered through Canvas; however, you may NOT share or discuss the exam with others. Doing so is a violation of Academic Integrity. Material from class lectures, assigned readings, and case study presentations are all fair game. Exam dates are posted (subject to change) and will be announced ahead of time in class. Students allowed extra time through Student Disability Services will be accommodated individually. UG and GR students take the same exams.

## Case Study Presentation

Each project group will lead one cooperative business case study discussion to help apply principles learned in class and to think more broadly about contemporary cooperative issues. All students (not just those presenting) are expected to review topic materials prior to class and participate in class discussion. Presentation and discussion of the case should last 30 minutes. Particular requirements of each presentation are posted on Canvas. Students must post materials prepared for discussion (e.g., power points, handouts) to Canvas discussion board prior to the start of class when assigned to receive full credit. All group members must participate in the presentation. Students are graded as a group incentivizing them to *cooperate*. Rubric provided. GR students will receive more research-intensive case studies from peer-reviewed journals consistent with their advanced training.

## Engaged Learning Projects

A semester-long engaged learning project is required where students apply principles learned in class. Projects involve working on real issues with real cooperatives! Students will self-select into projects, subject to reallocation by the instructor. Groups work directly with a co-op client to develop a timeline of work, set up meeting schedules, and present project deliverables. You will need to be organized and efficient in your work and respectful of the time with your client. Grading is based on quality of work, peer assessments, and client feedback. Progress reports are due throughout the semester and will be discussed during class to provide timely feedback. Failure to turn progress reports in on time will result in 10 points deducted (each) from your total project grade. Regular project meetings with the instructor and TAs are required. Additional information on projects and clients are provided separately. GR students will be included in their own group(s) and are expected to deliver more comprehensive products to their client(s), such as through data collection and analysis consistent with their advanced training. The instructor will assign GR students to project(s) most amenable to advanced research analyses. Rubric provided.

### Engaged Learning Project Topics and Clients for Spring 2022 (final will be 10 projects):

1. Columbia SEC Agrivoltaic cooperative development, EDF Renewables
2. Governance systems and member heterogeneity, Eden Valley Growers
3. Solar sheep grazing cooperative development, American Solar Grazing Association
4. Technical Assistance Worker Co-op, Kate Washington
5. Impact of Covid-19 on racial equity in worker co-ops, Kate Washington
6. Supply control program analysis OR other topic, National Grape/Welch's
7. Shellfish Marketing cooperative development, Long Island Oyster Growers Association
8. Macadamia Nut Producers Cooperative development, Royal Hawaiian Orchards
9. Benefit Corporations and Cooperatives OR other topic, Cabot Creamery/Agrimark
10. Marketing cooperative or Marketing order for onion growers, CCE Orange County
11. Food co-op Investment in farmer cooperatives, Park Slope Food Co-op

## Extension Curriculum & Delivery (GR)

GR students in the course will work with the instructor to develop cooperative development training curricula for use in extension programming by the Cornell Cooperative Enterprise Program (CEP). CEP staff will work with the GR students to identify needs for additional curricula and the expected learning outcomes of it. Students will work as a group to develop an online training video on the topic determined, along with any supplemental products such as workbooks, financial templates, and/or training exercises. The curricula may be developed from their engaged learning project based on consensus of CEP staff and the student group. Students will present the final products to the board of directors of the Northeast Cooperative Council at the end of the semester.

## Extra Credit Opportunities (optional)

### NFU College Conference on Cooperatives

February 17-20, 2022. Great for students studying business and want to learn more about co-ops. Features presentations by cooperative leaders from all across the cooperative spectrum, and is beneficial to both beginning students of co-ops and to students with some previous co-op education. Full attendance and participation is worth 5 extra credit points. In person (space limited) and virtual options are available. More information forthcoming.

### NECC Cooperative Leaders Forum

March 3, 2022, Syracuse, NY. Provides excellent opportunities to network with and learn from leading executives and directors in top agricultural co-ops in the Northeast. This is a great way to interact directly with leading cooperative members, directors, and managers. Full attendance and participation is worth 2.5 extra credit points. More information forthcoming.

### CoBank Northeast Customer Meeting

March 4, 2022, Syracuse, NY. This program is designed to provide you with insight on today's economy, political environment, and business leadership in the context of agricultural cooperatives. The meeting will feature a panel discussion with CoBank's President and CEO, Tom Halverson, and members of CoBank's Board of Directors from the Northeast region. Full attendance and participation is worth 2.5 extra credit points. More information forthcoming.

### Others

Other extra credit opportunities are offered extemporaneously during the semester based on class discussions (2-5 points each). They are not announced in advance incentivizing you to attend class.

## COURSE CALENDAR (subject to change, GR = additional reading assignments for GR students)

DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
Jan 25 Tuesday	Introduction, syllabus, expectations	Schneider, N. 2016. <a href="#">The curricular cop-out on co-ops</a> . <i>The Chronicle of Higher Education</i> . 29 October 2016. Biswas, S.N. 2015. <a href="#">Organizational behaviour research in rural producers' cooperatives: A neglected domain</a> . <i>International Journal of Rural Management</i> 11(1):40-59. Kalmi, P. 2007. <a href="#">The disappearance of cooperatives from economics textbooks</a> . <i>Cambridge Journal of Economics</i> 4(1):625-647. Hill, R. 2000. <a href="#">The case of the missing organizations: Cooperatives and the textbooks</a> <i>The Journal of Economic Education</i> 31(3):281-295.
<b>SECTION I: FRAMEWORK, PRINCIPLES, HISTORY, &amp; POLICY</b>		
Jan 27 Thursday	Ownership framework, justification, member value. Part 1.	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 1, 5 <a href="#">Boland (2017)</a> : Ch. 1 <a href="#">Zeuli &amp; Cropp (2004)</a> : Ch. 1, 9      Merrett & Walzer (2004): Ch. 9, 12 Ling, C. 2009. <a href="#">What cooperatives are (and aren't)</a> . <i>Rural Cooperatives</i> , November/December:4-6. Hueth, B. & A. Reynolds. <a href="#">A life-cycle perspective on governing cooperative enterprises in agriculture</a> . <i>Choices</i> 26(3).
Feb 1 Tuesday	Ownership framework, justification,	Chaddad, F.R. & M.L. Cook. 2004. <a href="#">Understanding new cooperative models: An ownership-control rights typology</a> . <i>Review of Agricultural Economics</i> 26(3):348-360.

DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
	member value. Part 2.	Alho, E. 2015. <a href="#">Farmers' self-reported value of cooperative membership: evidence from heterogeneous business and organization structures.</a> <i>Agricultural and Food Economics</i> 23:3-23. Munch, D.M., T.M. Schmit, & R.M. Severson. 2021. <a href="#">Assessing the value of cooperative membership: A case of dairy marketing in the United States.</a> <i>Journal of Co-operative Organization and Management</i> 9(1):100129.
Feb 3 Thursday	Cooperative structures, functions, scope, & impact. Part 1.	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 3 <a href="#">Boland (2017)</a> : Ch. 2 <a href="#">Zeuli &amp; Cropp (2004)</a> : Ch. 4, 8                      Merrett & Walzer (2004): Ch. 3, 8 Hueth, B. 2017. <a href="#">The state of the co-op economy.</a> <i>The Cooperative Business Journal</i> . Fall:4-11.
Feb 8 Tuesday	Cooperative structures, functions, scope, & impact. Part 2.	Dave Grace & Associates. 2014. <a href="#">Measuring the size and scope of the cooperative economy: Results of the 2014 Global Census on Cooperatives.</a> For the United Nation's Secretariat, Department of Economic and Social Affairs, Division for Social Policy and Development. World Co-operative Monitor. 2014. <a href="#">Exploring the co-operative economy.</a> International Cooperative Alliance. <a href="#">Schmit, T.M., F.C. Tamarkin, &amp; R.M. Severson. 2022. Differential economic impacts for cooperative business structures: An application to farmer-owned cooperatives in New York State.</a> In M. Elliott and M. Bolland (Eds.) <i>Research Handbook on Cooperatives and Mutuals</i> , Edward Elgar: Cheltenham, UK.
Feb 10 Thursday	Engaged Learning Projects	Review and discuss Engaged Learning Projects, expectations, and student learning agreement.
Feb 14 Monday	Engaged Learning Projects	Student preferences for projects (1 <sup>st</sup> , 2 <sup>nd</sup> , and 3 <sup>rd</sup> ) due to instructor by 12:00pm (email). 5 point penalty for late submissions.
Feb 15 Tuesday	Cooperative principles & alternative legal forms.	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 2 <a href="#">Boland (2017)</a> : Ch. 3 <a href="#">Zeuli &amp; Cropp (2004)</a> : Ch. 5                      Merrett & Walzer (2004): Ch. 2, 5 Coltrain, D., D. Barton, & M. Bolland. 2002. <a href="#">Differences between new generation cooperatives and traditional cooperatives.</a> Selected Paper. Risk and Profit 2000 Conference, Manhattan, KS, August 17-18, 2000. Moriarty, M.R. 2015. <a href="#">Combining charity with profit: L3Cs seen as a potentially valuable type of hybrid LLC to promote social good.</a> <i>Rural Cooperatives</i> , November/December: 34-37. Moriarty, M.R. 2016. <a href="#">Benefit corporations aim to promote public good; easily adapted to co-op principles.</a> <i>Rural Cooperatives</i> , January/February: 26-29, 37. Pitman, L. 2008. <a href="#">Limited Cooperative Association Statutes: An Update.</a> Staff Paper No. 7, University of Wisconsin Center for Cooperatives. April. Townley, E. 2020. <a href="#">The CEO of Cabot Creamery on Beating Sustainability Benchmarks.</a> <i>Harvard Business Review</i> . May-June. Project groups announced.

DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
		<b>Signed Student Learning Agreement due to instructor (hard copy submitted in class). 5 point penalty for late submission.</b>
Feb 17 Thursday	Historical development & antitrust	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 4, 9 <a href="#">Boland (2017)</a> : Ch. 4 <a href="#">Zeuli &amp; Cropp (2004)</a> : Ch. 2, 3      Merrett & Walzer (2004): Ch. 2, 5
Feb 17-20 Minneapolis	CCOC	College Conference on Cooperatives. Optional, extra credit (5 pts)
Feb 22 Tuesday	Historical development & antitrust	Volkin, D. 1985. <a href="#">Understanding Capper-Volstead</a> . Cooperative Information Report 35, Rural Business & Cooperative Development Service, USDA. June. Monica, J.C. 2015. <a href="#">Protecting cooperatives from antitrust liability</a> . <i>Rural Cooperatives</i> , January/February:20-21. Bolotova, Y.V. 2015. <a href="#">Agricultural supply control: Lessons from the U.S. dairy and potato industries</a> . <i>Choices</i> . Quarter 4.
Feb 24 Thursday	Case study presentations Project discussion	<b>Group 1:</b> Dunn, C.P. & B.K. Burton. 2010. Mission Federal Credit Union. <a href="#">HBP Coursepack</a> . <b>Group 2:</b> Tripathy, A., M. Agarwal, & T. Imam. 2015. Groundnut Value Chain at Anantapur: Growing through Co-Operatives. <a href="#">HBP Coursepack</a> . <b>Group project discussion</b>
Feb 24-25 Thu-Fri	PRELIM 1 (Canvas)	Take exam through Canvas. Open book but NO sharing with other students. Exam available starting 12:00pm Feb 24 to 11:59pm Feb 25 (36 hours). You will have 2 hours to complete the exam once you start it.
Mar 1 Tuesday	February Break	No class. ☹️
Mar 3 Thursday	NECC	No regular class. No office hours. Students may use classroom and class time to work with their groups on projects. NECC Cooperative Leaders Forum, Optional, extra credit (2.5pts)
Mar 3-4 Thu-Fri	CoBank	CoBank's Northeast Customer Meeting Optional, extra credit (2.5pts)
<b>SECTION II: COOPERATIVE FINANCE</b>		
Mar 8 Tuesday	Cooperative Financial Statements	Binion, R.W. 1998. <a href="#">Understanding cooperative bookkeeping and financial statements</a> . Cooperative Information Report 57, Rural Business Cooperative Service, USDA. Wissman, R.A. 1991. <a href="#">Working with financial statements: Guide for cooperative members</a> . Cooperative Information Report 42, Agricultural Cooperative Service, USDA. Burrasca, R.P., S. Grossberg, A. Misak, & J. Wiener. 2015. <a href="#">An Introduction to financing for cooperatives, social enterprises, and small businesses</a> . Community Wealth Building, Denver, CO. SKIM ONLY. <b>Progress Report #1 Due (10 point penalty on late submission).</b>
Mar 10 Thursday	Measuring cooperative returns	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 12 <a href="#">Boland (2017)</a> : Ch. 3 <a href="#">Zeuli &amp; Cropp (2004)</a> Ch. 7

DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
Mar 15 Tuesday	Distributing cooperative returns	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 13      Merrett & Walzer (2004): Ch. 6 Kenkel, P. 2015. <a href="#">Profit distribution alternatives for agricultural cooperatives</a> . <i>Journal of Cooperatives</i> 30:28-49.
Mar 17 Thursday	Capital structure: Equity Accumulation	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 14, 15 <a href="#">Boland (2017)</a> : Ch.3 <a href="#">Zeuli &amp; Cropp (2004)</a> : Ch. 7
Mar 22 Tuesday	Capital structure: Equity Redemption	Reynolds, B.J. 2015. <a href="#">How taxation policies affect demutualization of cooperatives</a> . <i>Rural Cooperatives</i> . November/December:26-29. Boland, M.A. 2012. <a href="#">Cooperative finance and equity management</a> . Conference Summary, The Food Industry Center, University of Minnesota. Royer, J.S. 2016. <a href="#">Assessing the Ability of Rural Electric Cooperatives to Retire Capital Credits</a> . <i>Journal of Cooperatives</i> 31:32-50. Hanson, E.D. 2020. <a href="#">Consolidation in the Farm Credit System: The case of AgCountry and United</a> . <i>Applied Economics Teaching Resources</i> . 2(6):51-60.
Mar 24 Thursday	Case study presentations Project discussion	<b>Group 3:</b> Siebert, J.W. & J.L. Park. 2010. <a href="#">Maintaining a healthy equity structure: A policy change at Producers Cooperative Association</a> . <i>International Food and Agribusiness Management Review</i> . 13(3):87-96. <b>Group 4:</b> Asokan, S.R. & H. Misra. 2019. Amalsad Cooperative: Process innovation in commodity trading. <a href="#">HBP Coursepack</a> . <b>Group project discussion.</b>
Mar 29 Tuesday	Financial feasibility	Review financial feasibility templates Schmit, T.M. & R.M. Severson. 2017. <a href="#">Exploring the feasibility of a rural broadband cooperative in Northern New York</a> . Extension Bulletin EB 2017-05. Applied Economics and Management, Cornell University. July. Schmit, T.M. & R.M. Severson. 2021. <a href="#">Exploring the feasibility of rural broadband cooperatives in the United States: the new New Deal?</a> <i>Telecommunications Policy</i> 45(4):102114.
Mar 31 Thursday	Case study Presentations Project discussion	<b>Group 5:</b> Su, Y. & M.L. Cook. 2015. <a href="#">Price stability &amp; economic sustainability – Achievable goals? A case study of Organic Valley</a> . <i>American Journal of Agricultural Economics</i> 97(2):635-651. <b>Group 6:</b> Bell, D.E. & N. Kindred. 2019. Zespri Grows. <a href="#">HBP Coursepack</a> . <b>Progress Report #2 Due (10 point penalty on late submissions).</b> <b>Group project discussion.</b>
Mar 31- April 1 Thu-Fri	PRELIM 2 (Canvas)	Take exam through Canvas. Open book but NO sharing with other students. Exam available starting 12:00pm Mar 31 to 11:59pm Apr 1 (36 hours). You will have 2 hours to complete the exam once you start it.
Apr 5 Tuesday	Spring Break	<u>No class.</u> ☹️
Apr 7 Thursday	Spring Break	No class. No office hours. ☹️
<b>SECTION III: GOVERNANCE</b>		



DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
Apr 12 Tuesday	Governance: Roles & responsibilities: Member heterogeneity	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 10, 11 <a href="#">Boland (2017)</a> : Ch. 6 Wadsworth, J. 2015. <a href="#">The essential roles of co-op managers</a> . <i>Rural Cooperatives</i> . March/April:32-33,41. Gray, T. 2015. <a href="#">Resolving member conflicts: Stakes are raised when an unhappy customer is a member-owner</a> . <i>Rural Cooperatives</i> . January/February:28-29.
Apr 14 Thursday	Governance Roles & responsibilities: Alignment	Franken, J.R.V. & M.L. Cook. 2017. <a href="#">A descriptive summary of cooperative governance and performance</a> . <i>Journal of Cooperatives</i> . 32:23-45. Kenkel, P. 2020. <a href="#">Aligning the cooperative board</a> . Oklahoma Cooperative Extension Service, AGEC-1068. January.
Apr 19 Tuesday	Governance: Decision making & Strategy	Reynolds, B.J. 1997. <a href="#">Decision-making in cooperatives with diverse member interests</a> . RBS Research Report 155, Rural Business-Cooperative Service, USDA Chaddad, F.R. & M. Bolland. 2009. <a href="#">Strategy-Structure alignment in the world coffee industry: The case of Cooxupé</a> . <i>Review of Agricultural Economics</i> . 31(3):653-665.
Apr 21 Thursday	Case Study Presentations	<b>Group 7:</b> Bajo, C.S., J. Campbell, K. Grant, & N. Russell. 2017. Fedore Cooperative: Effective conflict resolution and decision-making. <a href="#">HBP Coursepack</a> . <b>Group 8:</b> Lyngdoh, T., G. Narayanamurthy, & S. Guda. 2017. Mawlyngot's Tea Growers' Cooperative. <a href="#">HBP Coursepack</a> . <b>Progress report 3 due (10 point penalty on late submissions).</b> <b>Group project discussion.</b>
Apr 26 Tuesday	Governance: Decision Making & Strategy	Cook, M.L. 2018. <a href="#">A life cycle explanation of cooperative longevity</a> . <i>Sustainability</i> . 10(5):1586. Iliopoulos, C. & V. Valentiov. 2018. <a href="#">Member heterogeneity in agricultural cooperatives: A systems-theoretic perspective</a> . <i>Sustainability</i> . 10(4):1271.
Apr 28 Thursday	Property rights, obstacles to cooperation	<a href="#">Cobia &amp; Anderson (2000)</a> : Ch. 7      Merrett & Walzer (2004): Ch. 4, 7 Sykuta, M.E. & M.L. Cook. 2001. <a href="#">A new institutional economics approach to contracts and cooperatives</a> . <i>American Journal of Agricultural Economics</i> 83(5):1273-1279.
May 3 Tuesday	Property rights, obstacles to cooperation	Park, J.L. & J. Siebert. 2010. <a href="#">Rebuilding cooperative leadership: The case of Pedernales Electric Cooperative</a> . <i>Journal of Cooperatives</i> 24:64-79. Bedford, L. 2019. <a href="#">Minnesota cooperative falls prey to its general manager</a> . <i>Successful Farming</i> . May 20, 2019. Hariyoga, H. & R.J. Sexton. 2009. <a href="#">The rise and fall of Tri Valley Growers Cooperative</a> . <i>Journal of Cooperatives</i> . 23:87-100.
May 5 Thursday	Case Study Presentations	<b>Group 9:</b> Hardesty, S.D. 2009. <a href="#">The conversion of Diamond Walnut Growers</a> . <i>Journal of Cooperatives</i> . 23:40-52 (PRIMARY). Bell, D.E. & M. Shelman. 2015. Diamond Foods. <a href="#">HBP Coursepack</a> (SUPPLEMENTAL). <b>GR: Group 10:</b> Fulton, M.E. & K.A. Larson. 2009. <a href="#">Restructuring of the Saskatchewan Wheat Pool: Overconfidence &amp; agency</a> . <i>Journal of</i>

DATE	TOPIC	PREP READING ASSIGNMENTS & PRESENTATIONS
		<p><i>Cooperatives</i>. 23:1-19 (PRIMARY). Goldberg, R.A. &amp; M. Preble. 2012. Viterro.  <a href="#">HBP Coursepack</a> (SUPPLEMENTAL).</p> <p><b>Progress Report #4 due (10 point penalty on late submissions).</b></p> <p><b>Group project discussion.</b></p>
May 5-6 Thu-Fri	PRELIM 3 (Canvas)	Take exam through Canvas. Open book but NO sharing with other students. Exam available starting 12:00pm May 5 to 11:59pm May 6 (36 hours). You will have 2 hours to complete the exam once you start it in Canvas!
May 10 Tuesday	Project discussion	<b>Group project discussions and in-class group work</b>
May XX & May YY TBD	Final Project Presentations	Held during final exam period. Dates (2) and times established by class consensus. Written report and other deliverables due at time of presentation.
May ZZ TBD	Extension curriculum delivery	<b>GR:</b> Presentation by GR students to Northeast Cooperative Council on cooperative business education curriculum.



## Appendix 2

# ENGAGED LEARNING PROJECTS

COOPERATIVE BUSINESS MANAGEMENT (AEM 3260/5260) - Spring 2022  
STUDENT LEARNING AGREEMENT

## Background

A semester-long term project is required in this course where students apply principle learned in class. This agreement establishes the minimum expectations by students participating in the course's engaged learning projects with cooperative businesses or other businesses involved in cooperative business development. These projects are different from traditional term projects, more comparable to business consulting than an end-of-semester paper. As such, they require special attention, dedication, and mindfulness by each student to be personally and professionally successful.

Projects involve working on real issues with real cooperatives. You will work directly with a professional client associated with your project. Everyone has something to contribute, regardless of their beginning knowledge of cooperatives, in general, and the cooperative business itself, specifically. I highly encourage you to trust the process throughout the semester, even if you feel you have nothing to offer on day one. Indeed, many of the cooperatives are specifically looking for ideas and perspectives from you given your association outside of the cooperative itself.

No one expects you to know the answers to the cooperative's issues on day one, nor is there necessarily just one 'right' answer. Indeed, part of each of these projects is to evaluate different options to address the issues and positive and negative aspects of each. It is not for you to decide what the cooperative should do, but to provide unbiased results of the research at hand that address the priority issues associated with your project. New ideas, programs, or policies may surface that the cooperative may never have thought of. The goal is to analyze what is best for the cooperative, given the data you collect and the assumptions you make. Be respectful of the organization and all of its members' points of view.

## Format

During the semester, we will teach you about core concepts and competencies related to cooperatively structured businesses that you will apply directly in the work with your cooperative client. Doing so provides you with a unique experience to display your own talents and perspectives (you ALL have them!) to help others learn. Cooperative clients have expressed desire, need, and gratitude in utilizing students to provide unbiased and unique learning techniques that can be applied in their business. Each project has been framed by course staff and cooperative clients that describes the nature of the project and a draft set of expected deliverables to present to your client by the end of the semester. Deliverables can (and often do) change once project work begins and is based on student-client communications. Progress reports are due at various times throughout the semester to monitor progress and provide timely feedback.

Students self-select into projects, subject to reallocation by the instructor. It is with intention that I finalize the groups emphasizing the value of diversity across a number of characteristics (e.g., class year, background, major, gender, career interests, etc.). Groups work directly with their client to develop a timeline of work, set up meeting schedules, and present project deliverables. You will need to be organized and efficient in your work and respectful of the time with your client. While much of the work expected in these projects happens outside of the classroom, we will dedicate some class time and office hours to discuss your projects collectively and individually. In addition to your instructor, an Extension Associate and two undergraduate teaching assistants (TAs) provide significant human capital resources to help you navigate your journey. Regular (at least every other week) meetings with your assigned TA and instructor are required.

## Appendix 2

The limit to the form of your products rests with the extent of your own imaginations and ideas. Think about how you learn best and develop deliverables that follow it! Deliverables can include written materials, audio, video, and web-based products, operational guides, instructed exercises, presentations, and more! I will highlight some examples of prior years' projects to help stimulate your thinking. Previous project topics have ranged from cooperative development feasibility analyses, financial analyses of equity management and patronage refund programs, member education, director education, and governance issues of all flavors.

### Student Value

Remember, everyone in your group has something to contribute to these projects, regardless of their beginning knowledge of cooperatives and familiarity with the business topic. While admittedly cliché, the more effort you put in to these projects, the more you will get out of them – not only through learned experiences, but also through enhanced engagement with your client.

To enhance the value you get out of these projects is to acknowledge and plan for “tipping points” as the semester goes on. Early on, much of the communication with your client is one sided; i.e., from the client to you. This is necessary in order to understand the operations and goals of the cooperative business and why the issues you will be working on are important to them. This should take around 2-3 weeks of dedicated effort, review of materials provided by your client, and meetings with them. Take that in, ask questions, and understand it fully. From there you provide your initial, informed feedback to the client on data needs, methodologies to employ, and presentation forms of project deliverables. This is the first tipping point and, necessarily, one-sided; i.e., from you to the client. Enough effort early in your project should get you past this tipping point within another 2-3 weeks. This is not the final form of your deliverables, but rather a process you propose to your client to get you there. After suitable time for the client to consider your initial efforts and react to your proposed activities gets you to your second tipping point; i.e., two-sided communications. At this stage, regular interactions with your client and sustained effort to the work plan by your group propels your project to its final outcomes; i.e., the back and forth exchange of ideas, pivoting of effort, and revision of deliverables through consensus. Time management is crucial to allow enough time for exchange, review, feedback, and edits by the end of the semester.

Students benefit from applying principles learned in class, while cooperatives benefit from the opportunity to work with students as potential future employees and for the fresh, new perspectives they receive from people outside their organizations. Both value the highly interactive nature of this engagement. Routinely, these projects turn out to be students' favorite part of the class. In doing so, you will learn how to work together with your student colleagues and with your professional client. Commit to the experience, dedicate the time necessary, and enjoy learning in a new way.

### Grading

Given the nature of these projects, I do not assign you a grade on the specific deliverables, per se, that you bring to your client. While we set up general deliverables in the project descriptions at the beginning of the semester, the specific deliverables will be formally developed with you and your client throughout the semester. Accordingly, grades are largely process-based; i.e., how well you worked with your client and other students, the level of attention, leadership, and contributions to the group's defined deadlines, and, ultimately, providing something of value to your client. Formally, grading is based on quality of your final written report and class presentation, peer assessments, and client feedback.

Progress reports are due throughout the semester (format below) and will assist in the construction of your final report. Failure to turn progress reports in on time will result in point deductions from your total project grade. At the end of the semester, your group will deliver a final written report along with the deliverables you develop and give a formal presentation to the class and clients.

## Appendix 2

Review, sign, and return the *Student Learning Agreement* (below) regarding your participation in the projects. Adherence to these requirements will be an additional tool I use to assess student grades. Notably, these projects contribute strongly to your course grade (i.e., equivalent to 1.5 prelims). This is not only an indication to take the work seriously, but also to my perspective on their ability to contribute strongly to student learning and long-term value.

### Diversity, Inclusion, & Belonging

Having an educated perspective involves understanding and respecting individual differences. We tend to base our judgments on our own experiences. To understand the world beyond ourselves requires being open to the experiences of others, particularly those who have a significantly different perspective. Diversity of experience can include anything from being raised in another country or even in another part of the U.S., or it can relate to differences in age, ethnicity, race, religion, sexual orientation, gender identity, or many of the other ways in which we are all unique. Sharing your perspective is encouraged and will make this class, and your projects, a richer experience. Respect for others and understanding of differences is essential. We will always need to maintain respect for others' experiences and viewpoints, and strive to deepen our understanding of diverse perspectives. Just as you are obligated to respect others' perspectives, you deserve that same respect in return.

### Progress Report Descriptions and Due Dates

Date	Description
<b>Feb 10</b>	Discuss projects in class. Show examples from previous projects.
<b>Feb 14</b>	Student preferences for projects (1st, 2nd, and 3rd) due to instructor by 12:00pm (email). 5 point penalty for late submissions.
<b>Feb 15</b>	Project groups announced. Signed <i>Student Learning Agreement</i> due to instructor (hard copy submitted in class). 5 point penalty for late submission.
<b>Mar 8</b> <b>PR #1 due</b> <b>beginning of</b> <b>class</b>  10 point penalty on late submission	<p>This progress report provides evidence of an understanding of your cooperative business (existent or being considered) and a suitable work plan and project timeline you have developed with your client to follow. Parts of this report will serve as a useful <b>first draft for the introduction section</b> of your final report.</p> <ol style="list-style-type: none"> <li>1. Document a project timeline and work plan developed with and approved by your co-op client. Include agreed-upon meeting dates (and in what form) and key dates for specific outcomes. Note when your first meeting was held and who was present, including the TA (required). (1-2 pages)</li> <li>2. Provide a written narrative that adequately describes your cooperative (or proposed cooperative) and the industry it operates in. For existing cooperatives, include information on member requirements and the governance structure. For proposed cooperative ventures, describe prospective members and member requirements. (1-3 pages)</li> <li>3. Describe the objectives of your project and current deliverables under discussion with your client. Note student leads for each. (1 page)</li> </ol>
<b>Mar 31</b> <b>PR #2 due</b> <b>beginning of</b> <b>class</b>  10 point penalty on late submission	<p>This progress report comprehensively presents the methods you will use to produce the deliverables associated with your project. Parts of this report will serve as a useful <b>first draft for the methods sections</b> of your final report.</p> <ol style="list-style-type: none"> <li>1. Provide updated timeline and changes to deliverables (if any). Note progress on individual components. Document number of meetings held since last Progress Report (1-2 pages).</li> <li>2. Note unexpected challenges or delays and how you dealt with them (1 page).</li> <li>3. Describe in detail the issue(s) the co-op (or prospective co-op) is facing. Is it a recent or long-standing issue? Have there been previous efforts to address them? Were they successful or not (and why). Describe how your work will address the issue(s) in relation to the deliverables you will produce. (1-2 pages)</li> <li>4. What types of data and other information is needed to do your work? Where will it come from? What types of analyses, developments, and other project efforts will be completed? (2-3 pages)</li> </ol>

## Appendix 2

Date	Description
	5. Describe the (current) deliverables (specifically) that you intend to deliver. Delineate student leads for different components. (1 page)
<p><b>Apr 21</b> <b>PR #3 Due</b> <b>beginning of</b> <b>class</b></p> <p>10 point penalty on late submission</p>	<p>This progress report presents preliminary/draft versions and current status of project deliverables. Parts of this report will serve as a useful <b>first draft for the results section</b> of your final report.</p> <ol style="list-style-type: none"> <li>1. Provide updated timeline and changes to deliverables (if any). Note progress on individual components. Document number of meetings since last progress report and attendance at them (1-2 pages).</li> <li>2. Note unexpected challenges or delays and how you dealt with them (1 page)</li> <li>3. Describe the initial results and status of your project deliverables. What additional information needs to be collected and work completed on each (2-4 pages)?</li> <li>4. What responses and comments on the current version of deliverables have you received from your client? How and when will the revisions be completed? (1 page).</li> </ol>
<p><b>May 5</b> <b>PR #4 due</b> <b>beginning of</b> <b>class</b></p> <p>10 point penalty on late submission</p>	<p>This progress report presents updates and revisions of project deliverables. Parts of this report will serve as a useful <b>revised draft of the results section</b> and a <b>draft conclusions section</b> of your final report.</p> <ol style="list-style-type: none"> <li>1. Document number of meetings since last progress report and attendance at them (1 page).</li> <li>2. Note unexpected challenges or delays and how you dealt with them (1 page).</li> <li>3. Provide a comprehensive description of the revised deliverables. Include how the deliverables are intended to be used by your client and the benefits that are expected from their use (3-5 pages).</li> <li>4. What critiques of the revised deliverables did you receive from your client? Is there additional work needed on one or more components? How and when will they be completed in time for client review? (1 page).</li> <li>5. Draft conclusions section that summarizes how your deliverables, when implemented, address the issues you were faced with. Discuss additional research opportunities and/or potential products to develop that are beyond the scope of your project but would be additionally helpful to the client as they continue this work (1-2 pages).</li> </ol>
<p><b>May 10</b></p>	<p>In-class group work and discussion.</p>
<p><b>May XX and</b> <b>May YY</b> (5 project presentations per day)</p> <p>Dates and times TBD by class consensus</p>	<p>The final written report encompasses the sections you have been working on all semester, with appropriate revision.</p> <ol style="list-style-type: none"> <li>1. Your final written report (10-15 pages), along with all project deliverables, is due to the client and to the instructor at the time of your presentation. Delays in submission will be assessed a 10-point penalty to your final project grade. The report should be written as if directed to your client/cooperative.</li> <li>2. Professional presentations of your projects will occur on two dates, 5 presentations per date. Specific dates and times during the final exams period will be determined based on class consensus. All students are required for both presentation days, regardless of their particular presentation date. Absence will result in a 10-point penalty to your course grade. You must invite your client to attend the final presentations. You should format your presentation as if you were presenting to the cooperative's board of directors (or potential member groups for cooperative development projects).</li> <li>3. In order improve this engaged learning process for future classes, each student must also provide a response reflecting on their engaged learning project experience (1-2 pages) that include answers to the following questions: <ul style="list-style-type: none"> <li>○ What was the primary benefit you got out of the engaged learning project experience? What was the primary obstacle?</li> <li>○ What worked well? What didn't?</li> <li>○ What recommendations do you have to improve projects for future students?</li> </ul> <p>Submit your reflection to your assigned TA. They will acknowledge receipt and remove all student identifiers before providing responses, in aggregate, to the instructor. Failure to return a reflection will result in a 10-point deduct from your total class score.</p> </li> </ol>

## Appendix 2

# Student Learning Agreement

As a student participating in the 2022 AEM 3260/5260 Engaged Learning Projects, I agree to:

1. **Respect my fellow students and cooperative client.** I will respect others' rights to hold opinions and beliefs that differ from my own. When we disagree, I will address the idea proposed, not the person itself. I will be courteous and professional in all surroundings. I accept that there are different approaches to solving problems. If I am uncertain about someone else's approach, I will ask about it, and listen respectfully to how and why the approach could work. I will not demean, devalue, or "put down" people for their experiences, lack of experiences, or differences.
2. **Actively listen.** I will pay attention and listen carefully at all times to what others are saying. I will consider what they are saying before I respond. I will ask for clarification, when necessary, and not interrupt before my colleagues have finished, nor engage in private conversations to make my point.
3. **Be responsible.** I will share responsibility for including and hearing all voices in the discussion. I will respectfully encourage others to contribute when their voices are silent. I will use evidence and careful analysis to make my point, not uninformed opinions or ad hoc responses. I will speak up if I feel offended or ignored and I respect the open opportunity for others to do same. As a group, we will address such issues before moving on to other items.
4. **Be flexible.** I will recognize that everyone is learning through this project and may have different learning styles. I will be willing to change my perspective through our collective process, and make space for others to do the same. I understand that the deliverables of our project may be refined based on our work through the semester. I agree to work constructively with the cooperative client and group members to identify how such revisions may be made and for what purpose.
5. **Follow rules of confidentiality.** I will be sensitive to the information the cooperative client provides and how it is shared within the group. Confidential information will remain confidential, as discussed with our client. When I am uncertain, I will ask for clarification from our client. I will be sensitive to intentional and unintentional actions that might harm the relationship with our client and their professional associations and affiliations.
6. **Be prepared and contribute.** Next steps and assigned duties will be agreed to and assigned at the end of each group meeting (with or without the client). Preparatory readings assignments will be completed and I will be ready to report on my assigned duties. If I am unable to deliver as agreed, I will discuss why with my group in advance and propose an alternative solution. I will dedicate the necessary time, energy, enthusiasm, imagination, and intellectual talent to make the project a success. I understand my colleagues' learning partly depends on my engagement and commitment.
7. **Submit comprehensive progress reports.** As outlined, I will work collectively with my group to submit progress reports on time. I understand that these progress reports are meant to facilitate productive advancement of our project throughout the semester and to assist the instructor and project support team in helping them help us more effectively. I understand that the project reports are useful in informing and framing the structure of our final report and related deliverables.

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Name Printed

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Signature

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Date

# ENGAGED LEARNING PROJECTS

COOPERATIVE BUSINESS MANAGEMENT (AEM 3260/5260) -- Spring 2022  
CLIENT GUIDELINES

## Background

Engaged learning is a tool by which students take the theory and information they learn in the classroom and apply it to a 'real-world' issue or situation through engagement with a firm, community group, or other client. These projects are different from traditional student class projects, more comparable to business consulting than an end-of-semester paper. As such, they require special attention, dedication, and mindfulness by each student and collaborating client to be personally and professionally successful.

Students benefit from applying principles learned in class, while cooperatives benefit from the opportunity to work with students as potential future employees and for the fresh, new perspectives they receive from people outside their organizations. Both value the highly interactive nature of this engagement. Routinely, these projects turn out to be students' favorite part of the class. In doing so, they learn how to work together with student peers and with their professional client, but only if they commit to the experience, dedicate the time necessary, and enjoy learning in a new way.

Students self-select into projects, subject to reallocation by the instructor. It is with intention that I finalize the groups emphasizing the value of diversity across a number of characteristics (e.g., class year, background, major, gender, career interests, etc.). Groups work directly with you to develop a timeline of work, set up meeting schedules, and present project deliverables. They will need to be organized and efficient in their work and respectful of the time with you. In addition to course instructor, an Extension Associate and two undergraduate teaching assistants (TAs) provide significant human capital resources to help the students and you navigate your journey. Regular meetings with their assigned TA and instructor are required.

Students participating in previous classes have indicated that these projects are a highlight of the semester, after some apprehension at the beginning of the project. I emphasize to the students early on that everyone has something to contribute, regardless of their beginning knowledge of cooperatives and the cooperative client. For students to engage in these projects they sign a *Student Engagement Agreement* that establishes the minimum expectations of them with respect to the projects (provided separately for you). In particular, it states they will:

1. Respect their fellow students and the cooperative client,
2. Actively listen,
3. Be responsible,
4. Be flexible,
5. Follow rules of confidentiality,
6. Be prepared to contribute, and
7. Submit comprehensive progress reports as scheduled throughout the semester.

Given the nature of these projects, I do not assign students a grade on the specific deliverables they develop for you. While we set up general deliverables in the project descriptions at the beginning of the semester, the specific deliverables will be formally developed with you and your students throughout the semester. Accordingly, grades are largely process-based; i.e., how well students worked with their client and other students, the level of attention, leadership, and contributions to the group's defined deadlines, and, ultimately, providing something of value to you. Formally, grading is based on the quality of their final written report and class presentation, peer assessments, and client feedback. How well they follow the Student Learning Agreement is another tool I utilize in setting final project grades.

## Appendix 3

### Client Role

As a cooperative client, you are the point person by which the students intersect with the organization. We emphasize to students that the project is a semester-long effort, not a term project that can be completed during the last couple weeks of the semester. As such, working with you to set up a suitable work plan, meeting schedule, and timeline of events is essential early on in your efforts. While admittedly cliché, the more effort they put in to these projects, the more they will get out of them – not only through learned experiences, but also through enhanced engagement with you. Many times these projects involve surveys and interviews of members, directors, and/or managers. When necessary, your assistance will be helpful to make connections between students and members and cooperative leadership. You may be asked to provide governance documents and financial statements. Everything is treated confidentially. Nondisclosure agreements can be utilized if you feel they are appropriate.

**Communications.** We strongly suggest that you meet regularly with students - once every two weeks at a minimum. Meetings may be in person, phone, Skype, or other virtual platform. They need not be lengthy, but long enough to share and discuss information that keeps the project momentum going forward. Early in the project they may need to be more frequent (e.g., weekly). In the middle of the project there may be less frequent meetings as students collect data, synthesize the information, and begin to construct deliverables for your feedback. It is appropriate for clients to mutually set and agree to deadlines with students. For example, requesting that preliminary findings of a survey be shared with you within a specified date after the survey closes is appropriate. Students are expected to share progress reports with their clients during the semester (as well as with the instructor). It is highly recommended at the end of each meeting to discuss next steps and what will be presented/discussed on the next defined meeting date.

Please respond back to student inquiries within **48 hours**. You should expect the same response from them. If you are unable to respond fully in that timeline, notifying the students when they can expect a response is appropriate. Any conversation with or response from students that concerns you should be reported to the instructor immediately so that we can address it quickly to support your productive interactions with our students. Course staff are also available throughout the semester to discuss how things are going for you and answer questions.

**Tipping Points.** To enhance the value students and you get out of these projects is to acknowledge and plan for “tipping points” as the semester goes on. Early on, much of the communication with the client is one sided; i.e., from the client to the students. This is necessary for students to understand the operations and goals of the cooperative business and why the issues in the project are important to them. This should take around 2-3 weeks of dedicated student effort, review of materials you provide, and meetings with you. From there, students provide their initial, informed feedback to you regarding data needs, methodologies to employ, and presentation forms of project deliverables. This is the first tipping point and, necessarily, one-sided; i.e., from the students to the client. Enough effort early in your project should get students past this tipping point within another 2-3 weeks. This is not the final form of their deliverables, but rather a process they propose to you to get them there. After suitable time for you to consider their initial efforts and react to their proposed activities gets you to the second tipping point; i.e., two-sided communications. At this stage, regular interactions between students and client and sustained effort by students to the work plan propels the project to its final outcomes; i.e., the back and forth exchange of ideas, pivoting of effort, and revision of deliverables through consensus. Time management is crucial to allow enough time for exchange, review, feedback, and edits by the end of the semester.

### Outputs

**Project report and deliverables.** You should request a draft of the students’ final report and project deliverables at a time mutually convenient to yourself and to the students, and ahead of the final class deadlines to offer adequate time for feedback and revision (see dates below). Please review the draft documents, request clarification, and suggest any needed changes.



## Appendix 3

**Final presentation.** You and others from your organization are encouraged to come to Cornell University (Ithaca, NY) to see the final project presentations of the engaged learning project teams. Virtual attendance options will also be available. Given the number of projects this year (10), the presentations will be held on two days, each lasting 2 hours in length. Each team will have approximately 20 minutes to present their results. They are to consider the presentation as if they were presenting to you, the cooperative's board of directors, and/or the senior management team. If desired, the student team may also present to the cooperative itself before the end of classes, schedules willing, virtually or in person. Students will receive 10 extra credit points for doing so. We will support travel costs for the students to do so. When and where can be affirmed with your team.

**Student assessment.** At the close of the project, I will reach out to you regarding your assessment of individual student participation. We recognize that each student has certain strengths, gifts, and talents that will emerge over the ensuing weeks of the project. We see your input regarding their level of engagement and contribution to the project as one of the key considerations we use for their project grade.

### Dates of Importance

Important dates are outlined below that the students are aware. Additional details are provided to the students (See Student Learning Agreement). They are included here to assist you in working with them to establish a suitable work plan and timeline of activities.

Date	Description
<b>Feb 10</b>	Projects first discussed in class.
<b>Feb 14</b>	Student preferences for projects (top 3) due to instructor by 12:00pm (email).
<b>Feb 15</b>	Project groups announced. Signed <i>Student Learning Agreement</i> due to instructor.
<b>Mar 8</b>	<b>Progress Report #1 due.</b> This progress report provides evidence of an understanding of your cooperative business (existent or being considered) and a suitable work plan and project timeline developed with the client. Parts of this report will serve as a useful <b>first draft for the introduction section</b> of the students' final report.
<b>Mar 31</b>	<b>Progress Report #2 due.</b> This progress report comprehensively presents the data requirements and methods to employ to produce the deliverables associated with the project. Parts of this report will serve as a useful <b>first draft for the methods sections</b> of the students' final report.
<b>Apr 21</b>	<b>Progress Report #3 due.</b> This progress report presents preliminary/draft versions and current status of project deliverables. Parts of this report will serve as a useful <b>first draft for the results section</b> of the students' final report.
<b>May 5</b>	<b>Progress Report #4 due.</b> This progress report presents updates and revisions of project deliverables. Parts of this report will serve as a useful <b>revised draft of the results section</b> and a <b>draft conclusions section</b> of the students' final report.
<b>May 10</b>	In-class group work and discussion.
<b>May XX and May YY</b>	Final written report and all project deliverables due to the client and to the instructor at the time of class presentation. The report should be written as if directed to the client/cooperative. Professional presentations will occur on two dates, 5 presentations per date. Specific dates and times during the final exams period will be determined based on class consensus. All students are required for both presentation days. Students must invite their client to attend.