

Article

**CO-OPERATIVE DEVELOPMENT, POLICY, AND POWER IN A
PERIOD OF CONTESTED NEOLIBERALISM: THE CASE OF
EVERGREEN CO-OPERATIVE CORPORATION IN CLEVELAND,
OHIO**

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Abstract

After the financial crisis in 2008 and amid growing concerns about climate change, interest in systemic alternatives to neoliberal capitalism is growing. This cultural shift helps explain the enthusiasm from political elites, media, and academics that greeted the launch of Evergreen Co-operative Corporation in 2009. Based in Cleveland Ohio, Evergreen is a network of worker-owned co-operatives with scalability and replicability woven into its design. But how warranted is the broad-based enthusiasm around Evergreen? Is this a model that can be replicated across North America as its founders suggest? Based on site visits and stakeholder interviews, we argue that there are important limits on desires to reproduce the “Cleveland Model.” However, its ambitions for scalability and replicability position it to contribute to the important project of movement building that can facilitate the policy change needed to scale up the co-operative alternative.

Keywords

Co-operative movement, co-operative policy, alternatives to capitalism, Evergreen, worker-cooperatives

Introduction

Since its launch in 2009, Evergreen Co-operative Corporation, a network of worker-owned co-operatives in Cleveland Ohio, has magnetized media, political elite, and academic attention. Evergreen has garnered supportive coverage in the *Economist*, *Harper’s*, *The Nation*, *The New York Times*, *Fast Company*, *Time*, and *Business Week*. Sarah Raskin lauded the initiative in 2013 while she was serving on the Board of Governors for the Federal Reserve System (Raskin, 2013).¹ Ron Sims, then Deputy Secretary for the U.S. Department of Housing and Urban Development, referred to the

¹ Raskin is now Deputy Secretary of the Treasury.

Evergreen network as “brilliant” during a 2011 interview (Axel-Lute, Hersh, & Simon, 2011). Intellectuals on the Left have also been attracted to the initiative: Noam Chomsky has celebrated Evergreen in interviews and public talks, and the initiative has been cited by numerous academics as a hopeful alternative to the capitalist firm and its social and environmental externalities (Maheshvarananda, 2012; Wolff, 2012a; Gibson-Graham, 2014).

Evergreen is currently comprised of three worker-owned co-operative enterprises: Evergreen Laundry (offering sustainable and large-scale laundry service), Evergreen Energy Solutions (designing, installing, and developing PV solar panel arrays), and Green City Growers (a 3.25-acre hydroponic greenhouse that grows and sells leafy greens). Evergreen was designed to capture procurement flows from area “anchor” institutions: large hospitals and universities that are unlikely to leave the community, have a general commitment to improving it, and can do so by leveraging their purchasing power in support of local economic development (Wang & Filion, 2011).

While Evergreen currently employs approximately 120 people, the vision is that it will become a large network of worker co-operatives that can rejuvenate the depressed regional economy in Cuyahoga County and inspire replications in other regions across the United States. Evergreen’s key features are ensuring worker ownership, harnessing the local wealth of anchor institutions, and prioritizing sustainable service delivery. The initiative is designed with both scalability and replicability at its heart. Supporters refer to Evergreen as the “Cleveland Model,” an approach that can be pursued in communities across the country (Alperovitz et al., 2010). According to leaders with Evergreen, “What’s especially promising about the Cleveland model is that it could be applied in hard-hit industries and working-class communities around the nation” (Ibid).

Despite all of the (mostly laudatory) attention, the Evergreen case has not yet been studied in a sustained way. Furthermore, there is a dearth of literature on co-operative development in general (see Adeler, 2014; US Overseas Co-operative Development Council, 2007). With this article we aim to contribute to the collective learning that can happen from successful and failed co-op development experiments. Building this knowledge is especially important at a time when heightened contestation over neoliberal capitalism has intensified interest in the co-operative model (Restakis, 2010; Harrison, 2013; Cheney, Cruz, Peredo, & Nazareno, 2014).

Our primary finding is that Evergreen’s development depended on contextual factors that might not be replicable: a supportive and wealthy community foundation and champions within local government. The post-2008 period of contested neoliberalism in which Evergreen emerged (discussed in the “context” section, below) created opportunities for new alliances, as diverse actors were willing to consider alternative economic models. These alliances were critical to Evergreen’s emergence, but similar connections might not be available elsewhere. The fact that Evergreen’s start-up relied so heavily on context-specific private and ad hoc arrangements suggests that more

systematic, government-supported programs of financing and technical support are needed if worker co-operatives are to thrive in North America. We conclude that bottom-up, movement-driven action often precedes – and creates a climate for – policy change. Our analysis therefore falls within the social movement approach to co-operative development, which argues that robust popular movements are integral to successful development of co-operatives and often predicate policy breakthroughs (Develtere, 1996; Fairbairn, 2001; Diamantopoulos, 2012). While Evergreen’s replicability may be limited, its social movement orientation and ambition to scale up the co-operative alternative to neoliberal capitalism position it as a contributor to the important project of movement building that can facilitate the policy change needed to grow the co-operative economy.

Methodology: “movement-relevant research”

To contextualize our case study we conducted an extensive literature review on co-operative policy, focused specifically on co-op dense regions (see table 1). Our research team then visited Cleveland in May 2013. We did site visits to Green City Growers and Evergreen Laundry, interviewing management and speaking with employees at each location. We also conducted semi-structured interviews with key actors involved in the conception and implementation of the project. We sought from the outset to make our findings relevant not only to academics, but also to practitioners in the co-operative movement.²

We thus undertook this project as a form of “movement-relevant” research (Flacks, 2004; Bevington & Dixon, 2005; Dixon, 2014). According to Bevington and Dixon, movement-relevant research “emerges out of a dynamic and reciprocal engagement with the movements themselves. This engagement not only informs the scholarship but also provides ... accountability” (Ibid, p. 190). Our research team would like to see Evergreen and the co-operative movement in general thrive, and this article is an effort to understand the conditions that might enable this success. We believe, following Bevington and Dixon, that this commitment to the co-operative movement does not lead to bias, but instead adds incentive to provide the “best possible information” (Ibid, p. 192) to movement participants and supporters.

Context: Co-op development in a period of contested neoliberalism

Interest in the “Cleveland Model” has cut across the political spectrum, coming not only from progressive media and academics on the Left, but also from conservative venues like the *Economist* and the Federal Reserve Board. Evergreen emerged one year

² A member of our research team, John Restakis, is a leader in the international co-operative movement and he helped shape our research design, interview questions, and analysis of findings.

after the 2008 financial crisis, during heightened contestation over the philosophy and policy mix that has guided political economic affairs for the past forty years: neoliberalism. Neoliberalism involves a significant reduction in the state's social and environmental welfare role coupled with an expansion in the state's facilitation of private capital accumulation (Harvey, 2005; Collard et al., 2016). While neoliberalism has been consistently challenged since it arose in the late 1970s, contestation became mainstream after 2008, as the financial crisis raised questions about the viability of under-regulated financial markets and the growing inequality that helped fuel increased consumer reliance on credit (Piketty, 2014). During this period, too, climate change moved into the mainstream of political debate: in 2007 Al Gore's film *An Inconvenient Truth* won an Academy Award, and Gore shared the Nobel Peace Prize with the Intergovernmental Panel on Climate Change. As Gore himself articulates, neoliberal philosophy and policy has been a significant impediment to strong government action on climate change (Gore, 2010; Klein 2014).

This more mainstream contestation of neoliberalism – fuelled by economic crisis, rising inequality, and climate change – has not facilitated the emergence of broadly accepted alternatives, leading some critics to worry about a “zombie neoliberalism” that will not die (Peck, 2010). While the post-2008 period of contestation has not enabled a consensus solution to neoliberal capitalism's contradictions, it has powered the search for alternatives (Wright, 2010). Ideological perspective necessarily conditions the kinds of solutions different actors seek and support. American political elites like Sarah Raskin and Ron Sims, for example, are interested in innovative ways of addressing inequality and ecological strain that leave in place the fundamentals of capitalism (e.g. private ownership of key productive assets and the profit motive). Radical critics like Chomsky are interested in systemic alternatives to not only neoliberalism but also capitalism itself (Flanders, 2012). Co-operatives, Evergreen founders note, provide alternative economic models that “cut across ideological lines – especially at the local level, where practicality, not rhetoric, is what counts in distressed communities” (Alperovitz et al., 2010). Evergreen, then, is an ideologically flexible initiative: an innovative market-based poverty alleviation strategy or the germ of capitalism's successor, depending on one's point of view.

While Evergreen has benefitted from the surge of interest in economic alternatives post-2008, the whole co-operative movement is experiencing resurgence. The General Assembly of the United Nations declared 2012 the International Year of Co-operatives. The International Co-operative Alliance (ICA), an organization representing the global co-operative movement, recently reflected that “rarely has the argument in favor of co-operatives looked stronger” (2013, p. 2). Co-ops can be read as either an ethical supplement to neoliberal capitalism, one that evens out its contradictions in distressed communities, or they can be read as the basis for a systemic alternative. Leaders of the

Cleveland Model explicitly subscribe to the latter, more radical view, even as they strategically benefit from the former.

Evergreen is modeled after the Mondragon Cooperative Corporation (MC) in Spain, which has long been a model for large-scale co-operative development worldwide. Founded in 1956, MC is now a conglomerate including 110 worker co-operatives, and employing more than 80,000 workers (Abell, 2014, p. 16). Mondragon does business in manufacturing, retail, finance, and knowledge (research and development). As a worker owned co-operative system, Mondragon has several features that distinguish it from traditional capitalist firms: for example, a pay cap specifies that top earners with MC can only earn six times the pay of those in the bottom bracket (Mondragon, 2015). By comparison, CEOs for US corporations regularly make 400 times an average worker's salary – a rate that has increased twenty fold since 1965 (Wolff, 2012c).

Mondragon is one of the largest employers in the Basque region of Spain where it is centered (Dewan, 2014). The Mondragon model is not without its challenges, including the recent bankruptcy of Fagor, one of its larger companies (Alperovitz & Hanna, 2014), but it remains an example of how co-operatives can operate on a large scale, produce considerable wealth, share it equitably, and promote relative worker satisfaction. As such, Mondragon is a longstanding inspiration for movements and intellectuals interested in alternatives to the capitalist firm and economy (Gibson-Graham, 2006; Wright, 2010; Wolff, 2012b). Replicating Mondragon's successes, however, is no easy task. The region's political culture is an enabling factor: Basque country is home to a robust nationalist and separatist movement, and considerable associational energy is generated from feelings of marginalization at the hands of a dominant majority (Beland & Lecours, 2008).³ Political culture supportive of co-operative development is not easily replicated, a fact that limits the ability of the co-operative movement to transplant successes from one region to another (see Corcoran & Wilson, 2012; Logue, 2006; Logue, 2009).

Evergreen has generated popular and movement excitement partly because it appears to have successfully adapted the Mondragon model for North America. Northeast Ohio is not home to a political culture distinctively supportive of co-operatives. As Ted Howard, one of Evergreen's leaders, told us, "Some people think there must have been something about the Cleveland community that would welcome this co-operative development, but it was a foreign concept" (T. Howard, interview, May 29, 2013). As we learned, however, key supports were available in Cleveland – mainly a wealthy

³ The three regions with the highest levels of co-operative enterprise in the global north are all home to influential nationalist movements: the province of Quebec in Canada, the region of Emilia-Romagna in Italy, and Basque country in Spain. In these regions, a whole complex of factors have contributed to political cultures amenable to co-operative enterprise, nationalist sentiment being one (MacPherson, n.d.). Emilia-Romagna's political culture, in particular, is more shaped by a history of strong leftist political movements.

community foundation and champions in local government – that might not exist in other North American communities.

The case of Evergreen Co-operative Corporation in Cleveland, Ohio

Cleveland is still struggling to recover from the economic decline that began in the late 1960s. Once the fifth-largest city in the US and a center for manufacturing, Cleveland was hit hard by forces of economic globalization and the deindustrialization they brought. Plant closures, unemployment, and out-migration contributed to a depressed urban economy. Between 1970 and 1980, the city lost 24 percent of its population, one of the steepest drops in US urban history (Warf & Holly, 1997, p. 212). Those who left generally had the means to do so, “with the poor, elderly, structurally unemployed, or marginally unemployed remaining behind” (Ibid). White flight, the large-scale migration of whites from racially mixed urban neighborhoods to more suburban regions, was also a factor in the hollowing out of Cleveland (Song, 2014).

In the 1990s Cleveland began to slowly recover economically, and the city is currently a hub for health care services, biotech, and polymer manufacturing (Kaplan, 1999, p. 192). The two largest employers in the region are the Cleveland Clinic and University Hospitals, together employing 46,000 people (Suttell, 2014). Both institutions are located in the Greater University Circle (GUC), an area four miles east of downtown that is also home to Case Western University, the Cleveland Museum of Art, and the Museum of Contemporary Art. While the GUC is an economic and cultural engine, it is surrounded by seven low income and racially segregated (predominantly Black) neighborhoods. The median income for households in these communities is \$18,500; it is \$47,626 in the rest of the city (Cleveland Foundation, 2013). Unemployment sits at 24 percent, nearly three times the rate for the city at large (Ibid). The asymmetry between the economic dynamism of GUC and the racialized poverty of its adjacent neighborhoods points towards the unevenness of Cleveland’s economic recovery.

Evergreen finds one of its origin points in a larger effort undertaken by the Cleveland Foundation (CF), a local community foundation, to harness the wealth of the GUC for the economic benefit of the neighborhoods surrounding it. A product of Cleveland’s wealthy past, the Cleveland Foundation is one of America’s largest foundations, with an endowment of \$1.8 billion. In 2005 it launched the Greater University Circle Initiative, which sought to capture some of the \$3 billion dollars spent by GUC institutions each year for the purposes of local economic development (Ibid).

In 2006, India Pierce Lee, a program director with CF, heard Ted Howard from the Democracy Collaborative (DC) give a presentation on his vision of community wealth building. The Democracy Collaborative is a leader in the growing “new economy movement,” which seeks systemic change by challenging the imperative for constant

economic growth and by promoting economic equality and democracy (Alperovitz, 2011). The Collaborative defines community wealth building as “improving the ability of communities and individuals to increase asset ownership, anchor jobs locally, expand the provision of public services, and ensure local economic stability” (DC, 2015). A key part of DC’s community wealth-building strategy is harnessing procurement flows from anchor institutions whose deep rootedness in a community creates an incentive to prioritize local economic development.

Ted Howard’s strategy for community wealth building mirrored priorities of the Cleveland Foundation’s recent GUC initiative. Shortly after hearing his presentation, India Pierce Lee invited him and DC to do a feasibility study for enacting their community wealth-building strategies in Cleveland. The initial plan was to encourage pre-existing Community Development Corporations (CDCs) to incubate new social enterprises that could harness procurement flows, but no takers could be found. The plan was too risky for local CDCs whose expertise was rooted in affordable housing development (T. Howard, interview, May 29, 2013).

The worker-run co-operative model was a secondary plan that developed through conversations between Howard (from DC) and John Logue from the Ohio Employee Ownership Center (OEOC). Logue was a leading figure in co-operative studies and the employee ownership movement. He had written on the successful models in Mondragon (2009), Emilia Romagna (2006), and Quebec (Dubb, 2008); Evergreen was designed with these models in mind, especially Mondragon. The final plan was for a network of worker-owned co-operatives designed to capture procurement flows from anchor institutions, especially strategic opportunities in the emerging green economy.

It is important to understand Evergreen in the context of the Democracy Collaborative’s larger vision and work. The DC describes their mission as the pursuit of “a new economic system where shared ownership and control creates more equitable and inclusive outcomes, fosters ecological sustainability, and promotes flourishing democratic and community life” (Democracy Collaborative, 2016). In 2015, DC launched the “Next System Project,” (NSP) an initiative seeking to “launch a national debate on the nature of ‘the next system’ ... to refine and publicize comprehensive alternative political-economic system models that are different in fundamental ways from the failed systems of the past and capable of delivering superior social, economic and ecological outcomes” (Alperovitz, Speth, & Guinan, 2015). The NSP includes a statement signed by a broad assemblage of the political left (e.g. John Bellamy Foster, Van Jones, Roxanne Dunbar-Ortiz). Position papers on eco-socialism, commoning, and solidarity economics have been forwarded as part of the effort to debate and actualize the “next system” (Next System Project, 2016). Evergreen, then, should be understood as a local experiment in next system design. As we unpack below, there are limits to Evergreen’s nationwide replication. But the movement-building and systemic thinking that it is part of are crucial to the growth of the co-operative economy, and the transformation of neoliberal capitalism.

Given Evergreen's roots in the "next system" vision of the Democracy Collaborative, it is surprising that it would attract support from the Cleveland Foundation, a wealthy charitable foundation established by a banker and governed by members of Cleveland's economic elite. Indeed, once the plan for Evergreen was finalized, the CF pledged \$3 million of seed funding to the project (T. Howard, interview, May 29, 2013). The Foundation's support for a network of worker-owned co-operatives reveals some openness among local higher-ups to the idea of systemic reform. India Pierce Lee, for example, had previously held a post as a Director of the Empowerment Zone with the City of Cleveland's Department of Economic Development. Empowerment zones are federally designated high-distress communities eligible for a combination of tax credits, loans, grants, and other publicly funded benefits. At this post, Pierce Lee saw millions of public dollars being spent on economic development – all of it directed to employers – with minimal to zero effect: few new businesses, few new jobs created (Ibid). Brenner and Theodore have described empowerment zones as "neoliberal policy experiments" (2010, p. 413). Pierce Lee had experienced these experiments as failures, and was keen to try the alternative that Evergreen represented. Similarly, Howard told us how some CF board members raised ideological concerns over worker ownership, but that a willingness to try alternatives prevailed (interview, May 29, 2013). Cleveland's painful history of de-industrialization, out-migration, and persistent racialized poverty likely facilitated elite openness to new forms of economic development.

The Cleveland Foundation provided Evergreen with crucial seed funding and technical support. "I cannot stress enough that without the people at the Cleveland Foundation, Evergreen would not have happened," noted Candi Clouse from Cleveland State University's Center for Economic Development during our interview (May 28, 2013). Replicating the "Cleveland Model" is challenging when an integral piece is a supportive and wealthy community foundation. The current conjuncture of "contested neoliberalism," however, does make the availability of this support more probable. Research by DC on foundations experimenting with funding alternative economic development strategies (including support for co-operatives and employee-owned enterprises) found examples in Atlanta, Denver, and Washington, D.C. (Kelly & Duncan, 2014). But the authors also note how "many community foundation leaders talked about conservative boards, isolated from new ideas, who were reluctant to take up seemingly risky new ways" (Ibid, p. 29). Popular and elite frustration with neoliberalism means that foundation support for co-operative development is more possible than in previous eras, but this support remains contingent on local circumstance.

Elite frustration with mainstream economic development mechanisms also played a key role in the city's support of Evergreen. While the Cleveland Foundation provided seed funding and technical assistance, the city played a key role by helping to secure financing. Tracy Nichols, Director of Cleveland's Department of Economic Development, had seen the plans for Evergreen and wanted to help finance it. Evergreen lost a bank loan

in the 2008 financial crisis and having the City's support in securing financing was a big step towards actualizing their plan. For Nichols, the fact that the Cleveland Foundation was providing seed funding and logistical support helped legitimate Evergreen as a safe bet for municipal resources. But what really attracted Nichols, she said, "was the fact that they expected to hire people who were formerly incarcerated" (T. Nichols, interview, May 30, 2013). Indeed 62 percent of the workers for Evergreen Co-operative Laundry were formerly in jail (Ibid).⁴ Nichols noted:

We have a huge issue in Cleveland, in regard to both poverty and returning convicted felons to our community. When these people are unemployed you have high amounts of recidivism and you are spending taxpayer dollars for prisons and drug treatment or Medicaid. Or you can spend a smaller amount up front to help a worker-owned business get started that will employ and train those people with prison records. (Capital Institute, 2011, p.7).

For Nichols, a project like Evergreen fulfills an important social function by providing livelihood opportunities for the hard to employ, but can also save public money by reducing outlays caused by recidivism. Like Pierce Lee of the Cleveland Foundation, Nichols was frustrated by neoliberal forms of economic development focused on attracting employers with tax breaks and other incentives, only to see them leave when a better deal was offered elsewhere. As Nichols explained:

In economic development you create jobs by offering incentives to companies to relocate and a company is here for 10 years and then moves away, and you have to ask yourself, are these people measurably better off? They had a low-paying job for ten years and they paid their bills but they didn't build equity ... In a worker-owned co-operative everybody has to agree to move the operations. And that's unlikely to happen. (Nichols, interview, May 30, 2013).

The frustration that both Nichols and Pierce Lee felt towards the economic development status quo was an important element in the vital support Evergreen received from the Cleveland Foundation and the City.

⁴ Once hired, Evergreen's workers undertake one year of probationary employment before the membership votes on their inclusion as worker-owners who will share in the co-operative's profits (Capital Institute, 2014).

Accessing federal funds: The importance of alliances

All three Evergreen co-operatives are capital intensive. Without clear policy frameworks for funding (e.g. the co-op loan fund managed by Quebec's provincial government; see table 1), putting financing in place required ingenuity. Evergreen is almost entirely debt-financed. The majority of its funds have come from two federal social financing programs: Department of Housing and Urban Development (HUD) Section 108 funds, and New Market Tax Credits (NMTCs). Of the nearly \$24 million that have been raised from federal sources for Evergreen's development, approximately \$11.5 million came from HUD section 108 loans and approximately \$9.5 million came from NMTCs (T. Howard, interview, May 29, 2013).

The HUD Section 108 funds were established to provide communities with a source of financing for "economic development, housing rehabilitation, public facilities, and large-scale physical development projects" (HUD, n.d.) The HUD low-interest loans were inaccessible without the City's sustained help; funds flow through state and local governments. Monies from HUD provided the core financing for the \$17 million, 3.25-acre greenhouse that now houses Green City Growers (Ibid). The greenhouse is located on land that included residential housing prior to Evergreen's development. Not only did Cleveland's Department of Economic Development play a central role in securing financing, but it also facilitated the purchase of homes that needed to be demolished before construction of the greenhouse could begin.

Unlike HUD Section 108 funds, New Market Tax Credits could be accessed directly by Evergreen's founders without the City serving as intermediary. But NMTCs are also complex and would have been very challenging to negotiate without the Cleveland Foundation's technical assistance. "We call the New Market Tax Credits a full employment program for lawyers and accountants," reflected Howard "because there are hundreds of thousands of dollars of fees" (Howard, interview, May 29, 2013). The Clinton Administration launched the NMTC program in 2000 as a for-profit community development tool. The goal of the program is to help revitalize low-income neighborhoods with private investment that is incentivized through federal income tax credits (CDFI Fund, n.d.).⁵ The NMTC program is meant to be a "win-win" for investors and low-income communities, but investors win more, and at public expense (in the form of forgone tax revenue). The NMTC program is arguably an example of what Peck and Ticknell call "roll-out neoliberalism" (2002); they argue that the neoliberal agenda "has gradually moved from one preoccupied with the active

⁵ Investors make capital available for community economic development, and receive a tax credit worth nearly 40 percent of their investment over a seven year period (Community Development Financial Institutions Fund, n.d.). Since NMTCs operate as loans, investors earn interest on the capital they make available, in addition to the tax credits they receive (Ibid).

destruction and discreditation of Keynesian-welfarist and social-collectivist institutions (broadly defined) to one focused on the purposeful construction and consolidation of neoliberalized state forms, modes of governance, and regulatory relations” (2002, p. 384). The NMTC program creates new profit opportunities for private investors at public expense: the privatization of gain and socialization of loss common to neoliberal economic policy. A framework that made federal loans available directly to community organizations would arguably be more efficient and less bureaucratic. Lacking this option, Evergreen’s founders pragmatically harnessed whatever resources they could access.

Policy support for co-operative development

Evergreen’s emergence would have been greatly facilitated by policy mechanisms that made financing and technical assistance more readily available. The international co-operative movement has prioritized supportive legal frameworks as a key constituent of co-op growth (ICA, 2013), but there is not a robust literature on policy support for co-operatives. Supportive legal frameworks for co-operatives are a “deeply under-researched area” (Adeler, 2014, p. 50). Based on our review of existing literature, however, we found that there were six primary forms of policy support that have been successfully deployed internationally: co-op recognition, financing, sectoral financing, preferential taxation, supportive infrastructure, and preferential procurement. The most developed examples of these policies are found in areas of dense co-operative concentration: the Basque region of Spain, Emilia Romagna in Northern Italy, and Quebec, Canada.⁶ Below is a table summarizing how these six policy forms are deployed in the co-op dense regions (table 1). The table is included to facilitate further research in the understudied area of co-operative policy, and to clarify policy successes for organizers in the co-operative movement interested in emulating them. In the next section we examine “private” or ad-hoc versions of the policy supports that Evergreen used and explore what these improvisations reveal about the legislative needs of the US co-op movement more broadly.

⁶ Venezuela, under the leadership of the late Hugo Chavez, has recently emerged as another key area of co-operative growth (Harnecker, 2009; Purcell, 2011). More research is needed on the Venezuelan experience and the key role the state has played in expanding the sector.

Table 1. Characteristics of enabling policy environments, by region

Policy Forms	Spain	Italy	Quebec
1. Governmental recognition: acknowledgement of the economic development and social justice benefits of co-operatives.	Constitution (1978) pledges to support co-op growth.	Constitution (1947) recognizes the value of co-operatives.	Co-operative Development Policy (2003) notes that co-operatives play a key role in the economy and affirms Quebec's aim to remain a leader in the sector.
2. State Financing: support in the form of grants and loans	Not applicable	Majorca Act (1985) set up two funds for financing co-op development.	Government of Quebec maintains a robust low interest co-op loan fund for starts up and expansion.
3. Sectoral financing: legislation that supports the development of financing mechanisms within the co-operative movement itself	Federal Co-operatives Act mandates an indivisible reserve fund. Capital can be re-invested or leveraged for loans.	Solidarity Fund created in 1992. Co-operatives contribute 3 percent of their profits to co-op development funds used to support growth of the wider sector	Co-operative Investment Plan (CIP) (1985) offers members a tax deduction of 125 percent for any capital invested in their co-op.
4. Preferential taxation: tax code changes that benefit cooperatives	Corporate tax rate is 30 percent; co-ops pay 20 percent (or 10 percent, in the case of worker-coops).	Basevi Law (1947) allows co-ops to assign all their surpluses to indivisible reserves with large tax exemptions.	Not applicable. Canadian tax system does not distinguish between co-ops and other corporations.
5. Supportive infrastructure: state-funded technical assistance (money ear-marked for the technical side of cooperative development).	Co-operatives Act requires that each co-op establish an education and promotion fund. At minimum, 5 per cent of profits are to be directed towards the fund.	Co-operatives are legally required to join a co-op federation. As such, federations are well resourced, politically strong, and a key support for co-op development.	Regional Development Cooperatives (RDCs), funded by the province, (formed in 1985) support co-op development.
6. Preferential procurement: public	Basque Cooperatives Act gives worker co-	Many municipalities only accept bids from	Under developed.

purchasing that privileges cooperative sellers.	ops preferential rights in the cases of tie bids.	organizations meeting minimum requirements of disadvantaged employees (co-ops more likely to meet criteria).	
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Sources: Adeler, 2014; CCA, 2009; Corcoran & Wilson, 2010; Government of Quebec 2005; Labelle, 2001; Logue, 2006.

Moving from private and ad-hoc to public and sustained

Of the six enabling policy forms, Evergreen has benefitted from private and ad-hoc versions of recognition, financing, supportive infrastructure, and procurement. The Mayor of Cleveland, Frank Jackson, and Ohio Senator Sherrod Brown spoke at the opening ceremonies of Green City Growers. These high-level endorsements, while not written into policy, conferred legitimacy and boosted media coverage. In terms of financing, having a wealthy foundation backstopping the initiative was a crucial first step. The Foundation’s support helped bring the City on board, giving the Department of Economic Development the confidence to access HUD 108 funds to support the co-op. As Nichols reflected: “the loans have some risk for us, but I know the Foundation is backing this initiative, and I know they don’t want it to fail. They have money. I don’t have to worry” (interview, May 30, 2013).

Without technical assistance from the Cleveland Foundation and the Ohio Employee Ownership Center (OEOC), securing New Market Tax Credit funds would have been even more of a byzantine process. Both the Foundation and the OEOC offered legal support and co-op training respectively. The OEOC has received both state and federal funding, but its state funding has been largely cut. Again, the technical support Evergreen received was ad-hoc and private. Regularization of public funding for co-operative development, as is the case in Northern Italy and Quebec, would greatly facilitate US co-op development.

Evergreen is premised on harnessing procurement flows from anchor institutions, but this approach relies on the enlightened leadership of the anchors – most of which are private institutions and not subject to any public procurement policy, were it to be instated. Fortunately anchor leaders in Cleveland support the plan to direct procurement flows towards community economic development: as well as their contract with Evergreen, they participate in a Community Benefits Agreement (CBA) recently spearheaded by the City to promote local and diverse hiring in Cleveland construction projects (Atassi, 2013). Civic and anchor leaders are committed to community wealth building, but nurturing this support has been an ongoing process for representatives from the Cleveland Foundation and the Democracy Collaborative. In spite of these alliances,

capturing procurement flows has been a significant challenge for Evergreen. For example, until recently, Evergreen Laundry did not have a single contract with an anchor in Greater University Circle.⁷ The anchor institutions are generally locked into long-term million dollar contracts with their laundry services. Evergreen plans to forward bids when contracts end, as was done with University Hospitals, but in the meantime has focused its efforts on nursing homes and hotels. “We still have a long way to go in terms of really capturing anchor supply chains,” said Howard during our interview (May 29, 2013).

The City of Cleveland has been supportive of Evergreen but has not yet directed procurement flows its way. The City’s charter requires competitive bidding for its contracts, with economic performance as the primary determinant for a successful bid. Recent efforts, however, have sought to heighten purchasing flexibility to support broader policy goals. For example, a 2010 ordinance gives a slight bidding advantage to local firms and to companies certified for their use of green business practices, such as reducing waste and energy consumption (Gillispie, 2010). Bidding advantages also exist for firms certified as a small business or as a female-owned or minority-owned enterprise. Evergreen is positioned to benefit from these procurement advantages in the future. Rules to facilitate competitive bidding are meant to forestall cronyism, but they can also be a barrier to social impact procurement efforts. Policy innovations that enable public bodies to responsibly direct purchasing power towards community wealth building would accelerate co-operative growth. Experiments by the City of Cleveland are promising in this regard, and may become important policy supports for Evergreen’s growth.⁸

Evergreen has benefitted from ad-hoc and private versions of co-op recognition, financing, infrastructure support, and preferential procurement. More regularized public support in all six policy areas (table 1) would have made Evergreen’s founding less dependent on contingencies and heroism and would smooth the way for replications in other regions. Co-operative policy in the US is underdeveloped, especially compared to the co-op dense regions. The US Department of Agriculture does offer grants to rural co-operatives for technical assistance and product development (though these grants are capped at between \$200,000 and \$275,000) (United States Department of Agriculture, 2015). A similar program focused on urban co-operatives would have been a helpful funding source for Evergreen.

The Cleveland Model was enabled by robust foundation support and champions in local government. There is evidence suggesting that in this period of contested neoliberalism similar alliances might be possible elsewhere. In 2014, local governments in New York City and Madison, Wisconsin approved initiatives aimed at financing the

⁷ University Hospitals recently signed a five-year laundry contract with the co-op (Friess, 2014).

⁸ There is the looming danger, however, that preferential procurement policies will get overruled by international trade law. See McMurtry, 2014.

development of worker co-ops (Kerr, 2015).⁹ These local measures offer co-operative recognition, financing, and technical assistance. At the state level, California has passed a bill that establishes a legal form for worker co-operatives (Democracy at Work Institute, 2015). The bill offers official recognition by explaining the purpose and benefits of worker co-operatives, and allows worker co-operatives to create voluntary indivisible reserve accounts (Indivisible reserves are legislated in Spain and help generate sectoral financing). According to Sushil Jacob of the Tuttle Law Group, who helped craft the legislation, the long-term goal is to get tax credits for monies invested in indivisible reserve funds, as is done in Italy (see table 1) (interview, November 17, 2014). Finally, the legislation allows worker co-operatives to raise capital from “community investors,” a new legal category of investor; worker cooperatives can raise up to \$1,000 per investor, without registering these investments with the state securities regulator (thereby substantially reducing legal fees).

Federally, the National Co-operative Business Association is spearheading an effort to pass legislation that would create a program within the US Department of Housing and Urban Development to provide capital and technical assistance to co-operatives. This program would be a much-expanded version of the USDA’s rural co-operative development program; it would help with financing, not just technical support, and urban co-operatives would be eligible. The bill has been introduced twice (in 2011 and 2013) but has not yet made it out of the House of Representatives (NCBA, 2013). This would be a breakthrough piece of legislation; it would greatly facilitate co-operative growth in the United States.

Mondragon, and the robust co-op sectors in Quebec and Emilia Romagna, have all benefitted from supportive policy. But a crucial point that became apparent during our literature review is that strong co-op sectors in these regions *all preceded the policy breakthroughs that enabled further sectoral growth*. Adeler writes: “In the Spanish, Italian, and Quebec examples, co-operative development was pursued by federations of co-operatives, and co-operative groups or alliances, initially with little or no state support, yet proved highly successful in producing an enabling environment for co-operative development” (2014, p. 51). Policy change played an important role in facilitating sectoral growth, but a robust sector was needed to win and keep these legislative victories in the first place. This finding is aligned with the social movement approach to co-operative development. According to Diamantopoulos (2011, p. 49), “Co-operative development may benefit from supportive public policy and sound management but it necessarily depends on concerted movement action to transform the field, periodically realigning movement frames and resources to effectively focus on new opportunities and drive new

⁹ The Madison plan is to create a co-operative loan fund that offers low to no-interest loans. Straightforward financing support like this would have made launching Evergreen easier (although its capital needs were more substantial than what recent allocations in New York and Madison could cover).

campaigns.” The political muscle needed to pass co-op-supporting legislation first requires a more robust national sector. Local policy change can precede vibrant co-op movements, but movement building will be needed to win the state and national legislation required to scale-up the co-operative economy. The Next System Project is hopeful in this regard. While still a young initiative, it is beginning to assemble the popular power required to push legislative and systemic changes that can facilitate the scaling up of the worker-cooperative alternative that Evergreen represents.

Conclusion

Evergreen and its leaders have played a key role heightening the co-operative movements ambitions for growth and power in North America (Abell, 2014). There are efforts afoot to replicate Evergreen in Prince George’s County, MD; Rochester, NY; and Richmond, VA. There is also a related model being experimented with in Cincinnati and Denver: a partnership between Mondragon and the United Steel Workers (USW). This new “union Co-op” model allows for co-op developers to benefit from the expertise and capital of unions. New union co-ops being started in Cincinnati, for example, received financing from a variety of sources including USW and the Greater Cincinnati Foundation (Gilbert, 2015). Future research should track these cases of co-operative development, as insight into the successes and challenges of these initiatives can help facilitate sectoral growth.

Evergreen’s leaders are well aware of the challenges they face expanding the network in Cleveland and sparking copycat co-ops across the continent. The Democracy Collaborative hopes that publicity around the Evergreen story will increase popular interest in co-operatives and ultimately grow the sector. At the same time, Howard noted a disjuncture between attention Evergreen has received and the co-op’s actual growth: “In some ways,” he said, “the story around Evergreen is more robust than actual fact” (interview, May 29, 2013). Stabilizing the system in Cleveland is a crucial part of this movement-building effort, as is managing expectations around replicating the model. Evergreen CEO John McMicken recently said Evergreen has “closed the door down on some of the hype while we focused on our operations and our staff and the health and well-being of our business. We have to have a real story to tell, that we’ve launched ourselves into consistently successful businesses. That has to be the focus” (Friess, 2014).

Our argument is that replicating the “Cleveland Model” will be challenging given the serendipity that allowed for Evergreen’s emergence (the two central contingencies being backing from the Cleveland Foundation and the City). This said, the period of “contested neoliberalism” has increased popular and elite interest in economic alternatives. Evergreen benefitted from growing fatigue with neoliberal economic development in Cleveland, and co-op developers in other regions may find similar

openings. Evergreen's growth locally and ability to become a replicable model nationally faces significant challenges. Its efforts towards scalability and replicability, however, along with the Democracy Collaborative's larger effort to build popular power for systemic change, are precisely what the US co-operative movement needs to become a stronger political force, one capable of winning legislative change. For Howard:

It's been harder than I thought, but I'm heartened we're still here ... We've stabilized and we're back on a growth curve, and I think Evergreen ... represents a possibility or hope for people, in a field where so much of what people have tried has just hit a dead end. This has been a learning laboratory. It's been an experiment. I don't say Evergreen's the answer, but I think it's been able to unlock the imagination for people way beyond Cleveland (ibid).

Ambitious co-operative development initiatives like Evergreen, coupled with self-conscious efforts to strengthen the political power of the co-operative movement, are needed to make the co-operative economy a viable alternative to neoliberal capitalism.

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