Working Paper

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Shared-Services Cooperatives: Strengthening Local Economies through Collaboration*

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Abstract

Shared services cooperatives are member associations formed to meet a variety of institutional needs for economies and efficiencies of scale through collaboration in areas such as purchasing, marketing, processing and distribution (Crooks, Spatz & Warman, 1997). Our study examines cases in business, finance, health, and public sectors of the US economy.

This research develops a theoretical understanding of how this form compares to related types of cooperatives and other forms of collaboration. It also empirically documents how shared services are used. The research looks at the experience of these shared-services cooperatives: what are the benefits to members; how they are structured and their impact on the local economy.

Key stakeholder interviews were conducted with senior staff of cooperatives in financial services, watershed authorities and watershed management, as well as in the health sector, the business sector, and public libraries. The study develops a comparative case analysis utilizing a social ecology analytic framework.

The benefits of this form of shared services cooperative are: access to influence networks; enterprise integration and interoperability; sharing of training resources; greater financial resources and professionalism (risk and financial safety); growth opportunities; and increased retention. Key to success is the development of trust and services that are well and affordably administered.

Keywords: Shared Services, reliability, cooperative empowerment, administrative flexibility, networking, sharing economy, economic sustainability

JEL Code: P13

Introduction

Shared services cooperatives are a form of interorganizational networks. While it is widely used as a form of organizational collaboration, documentation of them is limited in the literature on cooperatives. Between 2014 and 2018, we engaged in research to document the use of this form of cooperative in the American economy. Our research found that the shared services cooperative model is present in all areas of the American organizational landscape. Shared services cooperatives may be for profit or nonprofit organizations. They operate in governmental and parastatal sectors, financial services, business and health care.

We examined shared services cooperatives across sectors utilizing in-depth interviews and review of corporate information. The result is a cross case comparative analysis of shared services cooperatives. All the selected cases are cooperatives with a democratic governance structure; a defined class of members and a long-term commitment to inter-firm collaboration guided by a formal contractual relationship to one another. The analysis of the cases utilized a social ecology framework adapted and elaborated with the logic model used in impact assessment. The complete presentation of this research is reflected in a book, *Shared Services: A Qualitative Analysis*. Here we present an overview of the theoretical framework, the cross case comparison and report on the conclusions of that research.

The Challenge of Nomenclature

Shared services effectively captures the full range of activities that these cooperatives engage in but has had limited usage as a way of classifying this form of cooperative. We adopted this terminology from the United States Department of Agriculture (USDA). The USDA defines shared services cooperatives as “a business organization owned and controlled by private businesses or public entities that become members of the cooperative to more economically purchase services and/or products. Members of shared services cooperatives respond jointly to common problems” (United States Department of Agriculture, 1995, 2; Crooks, Spatz and Warman, 1997, 3). This could as readily serve as the definition of purchasing and marketing cooperatives in the business sector or agricultural cooperatives, which focus their activities on providing farmers the benefits of group purchasing and marketing. Frequently, these cooperatives over time extend the scope of membership services beyond purchasing and marketing. Provan, Fish and Sydow (2007, p. 480) found in their metaanalysis of the empirical literature on interfirm networking that these entities may be called partnerships, interorganizational relationships, coalitions, cooperative arrangements, or collaborative agreements. Common to all are themes of social interaction of individuals on behalf of the organizations, relationships, connectedness, collaboration, collective action, trust and cooperation (Provan, Fish, & Sydow, 2007, p. 481). Nomenclature is therefore a problem both at the level of the organizational literature as well as the literature on cooperatives.

While we have opted to refer to this form of cooperative as shared services, we soon found that it was important to distinguish these cooperatives from the share economy. Firms such as Airbnb, Uber or Lyft bring individuals together in a business activity through a shared marketing platform just as many of the cooperatives in this study. However businesses in the share economy are not member owned and operated. The contractors assume all the risks but the company takes a hefty fee for their role. Profits in these firms go to the shareholders. In a shared services cooperative, members share the risks and benefits, including profits.

In developing the criteria for what would qualify as a shared service cooperative, we relied on the cooperative principles as the criteria for selection of cases. Therefore, they had to identify as a cooperative; be member owned and controlled; and have a defined class of members. The cooperative had to include two or more institutions, institutional representatives or sole proprietor businesses as members. Participation in the cooperative must be voluntary.

Most case examples studied are well-established mature organizations. They provide their members access to resources beyond what any of them could generate on their own. The result is that they are better able to serve their communities, their customers and/or their members. Some shared services cooperatives may have small business owners as their members. In other cases, they may serve organizations such as hospitals, water districts, public libraries or municipalities.

Shared services cooperatives provide members the resources to be more nimble and responsive to external forces in their environment. Popp, Milward, MacKean, Casebeer, and Lindstrom (2014) developed a tool kit for network leaders and managers. This resource examines the benefits and challenges to this type of collaboration. The benefits cited are: access to and leveraging of resources; shared risk; efficiency, service quality, coordination, seamlessness; advocacy; learning and capacity building; positive deviance or the ability to think beyond the organizational norm; innovation; shared accountability; and flexibility and responsiveness (Popp, Milward, MacKean, Casebeer, &

Lindstrom, 2014, p. 21). On the flip side, organizations may find this to be challenging to their organizational autonomy. The member organizations need to be able to align their priorities and achieve consensus; to overcome cultural differences; develop trusting relationships; address power imbalances; work collaboratively and aggregate the resources for managing greater complexity and ongoing coordination in order to be sustainable (Popp, et al., 2014, p. 24). The governing cooperative principles provide a set of norms and values that are well suited to support networked organizations.

Popp, et al. (2014, p. 37) identified three types of network governance which are relevant to understanding the structure and functions of the cases examined in this research. The three types are: *shared governance* where the members provide the management and leadership and there is no formal administrative body; *lead agency* where the administrative entity and leadership is provided by a member; and *network administrative organization* where a third party provides the coordination and a manager is hired. The evolution of interfirm networks often will begin with shared governance but as the organization matures and secures more resources, it can move to a network administrative model (Popp, et al., 2014, p. 37). The authors note that shared governance is the most decentralized form of the three. Lead agency forms are the most centralized and the network form is a hybrid of the two. The leadership of these networks need to develop a stewardship form of leadership or leadership as host form. Citing Wheatley and Frieze (Popp, et al., 2014, p. 41), they emphasize the need for leadership to be transparent, inclusive of members in decision making, and to insure open communication. These principles of good governance are wholly consistent with the cooperative principles.

Interfirm collaboration is essential to the sustainability of the cooperatives examined in this study. In the governmental/parastatal sector, it is required to access federal dollars and often state and local financing as well. In the small business sector, it is key to the ability of independent owners to reduce their isolation and through networks secure greater control over their business markets. Organizations of all types see the benefits of establishing strategic partnerships. In turn, those relationships can improve the efficiency and effectiveness of the organizations. Through such networking, resources and information sharing lead to opportunities for innovation and enhanced operations. These interfirm relationships often grow out of the limits of the market economy. Through cooperation, the members are able to achieve greater economies of scale and improved operations.

In identifying the cooperatives, which appear in this study, we utilized the Internet, and key informants familiar with the sector to aid us in locating the shared services cooperatives. Qualitative interviews were conducted with senior staff in the cooperatives. Additional information about the organizations was secured from their corporate website and from information provided by the organizations. The research sets out to describe the ways in which shared services cooperatives are organized, who are the members, how they benefit their members and why they formed a cooperative as opposed to other forms of collaboration (joint ventures, subsidiaries, collaborative agreements).

The Theoretical Framework

The study adopted a social ecology framework for our analysis of the cases. Social ecology proved to be a very effective framework for examining the push/pull factors in the formation of the shared services cooperative.

Push factors refers to internal pressures to seek out partners such as financial and/or market challenges or risk management concerns. Pull factors are externally driven, for example, public policy that restricts access to financing to cooperatives as is the case for federal funds for rural hospitals, transit systems and public libraries in the United States. Ivery's (2007) theoretical model examines the internal and external as well as the organization form of the network, what the organizational vulnerabilities are and the characteristics of the network. This framework examines whether the networks are loosely or tightly coupled. "Loosely coupled" refers to social structures that are multilevel and where subsystems maintain their independence and are linked through a limited number of direct connections. "Tightly coupled" systems are more closely connected with one another and each organization experiences greater influence from actions of the other organizations. He notes that it is possible for both loosely coupled and tightly coupled elements to coexist in the same network (Ivery, 2007).

Shared governance is consistent with a "loosely coupled" social structure. A lead agency or network administrative structure is likely to be more tightly coupled. Another analytic consideration is how it changes the organizational form. Ivery's theoretical model in addition to considering organizational structure, examines what the organizational vulnerabilities are and the characteristics of the network.

The theory building incorporated also the works of Faust, et al. (2015); Miskon, et al. (2013); Van der Krogt, Nilsson, and Høst (2007); and Vernadat (2010). Faust, Christens, Sparks, and Hilgendorf (2015) studied how the structure of collaborative activity and the location of high capacity organizations in a network may relate to community conditions. In their research, they identified four dimensions of a learning organization: strategic leadership, embedded systems, staff empowerment and systems connection. In analyzing the various cases in the current study, we highlight those factors where present in the reviewed cases. Palinkas et al. examined three criteria in a study of public agencies serving abused and neglected youth: (1) characteristics of the collaborative process; (2) characteristics of the external environment in which the collaboration took place; and (3) characteristics of the organizations and their members participating in the collaboration (Palinkas, et al., 2014).

van der Krogt, Nilsson and Høst (2007) examine the role of mergers, acquisitions and alliances in agricultural cooperatives during the wave of consolidation from 1998-2002. They found two attributes inherent in the cooperatives: risk aversion and equity capital constraints, which are relevant to analyzing the current cases.

Vernadat (2010) observed that enterprise networking is widespread and essential to the sustainability of business entities or organizations due to the impact of technology and globalization on the pace and increasing complexity of commerce (Vernadat, 2010, 139). Enterprise integration (EI) occurs when there is a need to remove organizational barriers and where the benefit of collaboration results in greater capability for the member organizations (Vernadat, 2010, 140). He stresses that there is a range to EI from full integration, where the individual organizations become a seamless integrated system that is "tightly coupled" to "loosely coupled" where the component organizations remain autonomous (Vernadat, 2010, 140). Vernadat (2010) identifies two frameworks necessary for analyzing EI (ibid., 140). The first framework identifies five levels referred to as the LISI Reference model which the US Department of Defense developed.
The five levels of interoperability are as follows (C41SR, 1998):

- Level 0 – isolated systems (manual extraction and integration of data).
- Level 1 – connected interoperability in a peer-to-peer environment.
- Level 2 – functional interoperability in a distributed environment.
- Level 3 – domain–based interoperability in an integrated environment.
- Level 4 – enterprise-based interoperability in a universal environment (Vernadat 2010, 140).

The ATHENA Interoperability Framework (AIF) is the second framework and was developed with funding from the European Union (http://modelbased.net/aif/). This framework is structured in three parts, namely:

1. Conceptual integration, which focuses on concepts, metamodels, languages and model relationships. The framework defines an interoperability reference architecture that provides a foundation for systemizing various aspects of interoperability.
2. Application integration, which focuses on methodologies, standards and domain models. The framework defines a methodology framework that provides guidelines, principles and patterns that can be used to solve interoperability issues.
3. Technical integration, which focuses on the software development and execution environments. The framework defines a technical architecture that provides development tools and execution platforms for integrating processes, services and information. (Vernadat, 2010, 140-141).

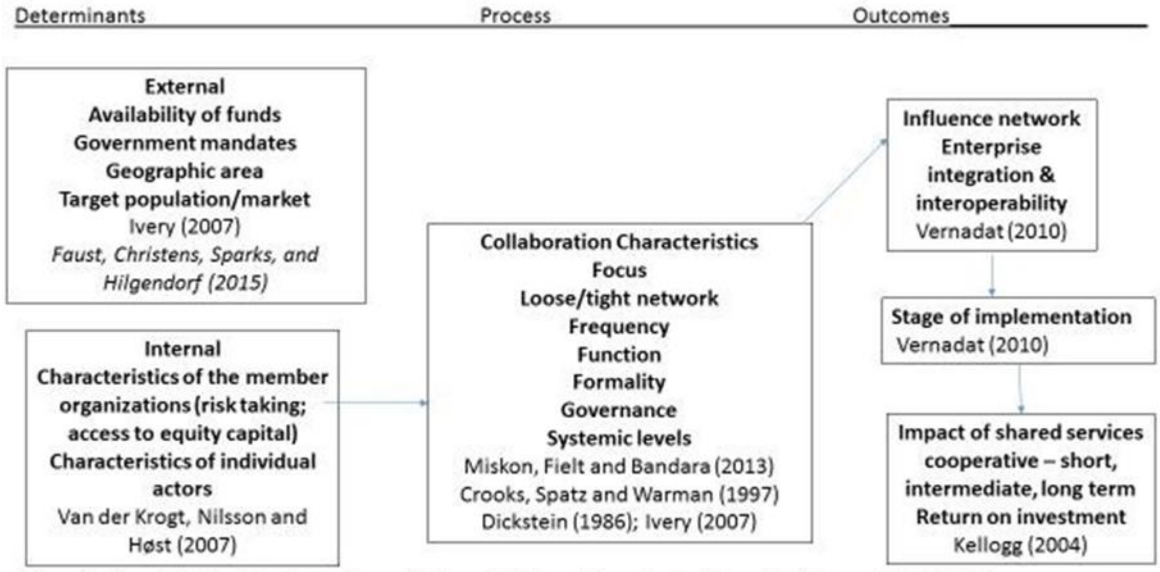
The organizational issues focus on business goals, the alignment and coordination of the business processes and the capacity of the partner organizations to collaborate. Capacity is in part a question of technical compatibility, but it also entails consideration of trust management, security issues, confidentiality issues, legal issues, and linguistic issues where the partners speak different languages (Vernadat, 2010, 143).

A final element in the analytic framework was adapted from the literature on logic models assessment of the impact of the collaborative/cooperative organization. The W.K. Kellogg Foundation Logic Model Development Guide outlines five basic elements which can be used in evaluating shared services cooperatives (W.K. Kellogg Foundation, 2004) – inputs, activities, outputs, outcomes and impact.

Drawing on these various sources, we can build an adaptation of the heuristic model developed by Palinkas et al. (2014), which provides a model for the analysis of shared services cooperatives. See Figure 1. This heuristic model provided a useful and effective analytic framework for examining both the external and the internal factors that drive the need for inter-organizational collaboration. It also established a set of characteristics, which can be identified in the cases and a framework for examining the ways in which they are networked. We incorporate consideration of the stages of implementation using the criteria outlined in Vernadat (2010) to define the type of integration implemented. The final factor in the model is the impact shared services have on the member organizations, their communities and the larger society.

Figure 1 reflects how the various theoretical sources are incorporated into a unified framework for consideration of the determinants that led to the formation of the cooperative; the process elements pertaining to the structural characteristics of the cooperative; and lastly the outcomes in terms of such factors as sustainability, impact on the members and the larger community.

Figure 1 - Heuristic Model of Inter-Organizational Collaboration adapted from Palinkas, et al. 2012, 77



Methodology and Theoretical Framework

Key stakeholder interviews were conducted with senior staff of shared-services cooperatives and two key informant interviews with people who have developed shared services cooperatives. The cases draw from the following sectors: financial services, watershed authorities and watershed management, the health sector, business sector, and public libraries. The study develops a comparative case analysis utilizing a social ecology analytic framework.

The study includes interviews with 18 organizations and also utilized data from two earlier studies of shared service cooperatives. Typically, the interviews were with senior staff of the cooperative. Where possible, we interviewed the founders of the cooperatives.

The interview questions covered four thematic areas: the history of the cooperative; the reasons for using a cooperative ownership structure in their collaboration; membership, and governance. The first set of questions on the history of the cooperative provide data about the external and internal factors that led to the start of the cooperative. They also examine the process/operation of the organization and changes over time. Questions on the decision to use a cooperative ownership structure generated data regarding the external and/or internal determinants that led to the use of a cooperative ownership structure. This section, along with those on membership and governance, provided detailed information about the form of the cooperative and its networking structure. All three researchers coded the interviews independently; thus insuring the reliability of the study.

Each section examines case examples that illustrate how shared services cooperatives are used in that sector as well as the benefits to their member. Based on the data, the cases are examined comparatively. Types of internal and external factors that influenced the development of the cooperative are analyzed. Characteristics of the co-ops are examined as well to determine patterns and functions of the cooperative system. The impact of the cooperative was assessed based on the interviews and other available organizational materials.

The purpose of this study was to develop a clearer theoretical understanding of how this form compares to related types of cooperatives and also to document empirically how shared services are being used for economic and community development. Key stakeholder interviews were with senior staff of shared services cooperatives in financial services, watershed authorities and watershed management, a specialty flooring cooperative, a plumbing supply cooperative, an alternative health service cooperative, and public libraries.

Overview of the Shared Services Cooperatives Cases

The cross case comparison generated some specific themes across the various sectors. Those themes are:

(1) A shared services cooperative is readily adaptable to different sectors and economic activities;
(2) Shared services cooperatives enable their members to achieve greater economies of scale;
(3) The mature shared services cooperatives typically adopt a network administrative structure;
(4) External factors were a major contributor to the formation of these cooperatives;
(5) All the governmental case examples were established as a cooperative to qualify for public funding;
(6) The ability to access and leverage resources is significant incentive to join a shared services cooperative.

All the cases in the study were formally structured and governed by either a board of the whole or elected members. The fact that they were organized as cooperatives gives them a predefined legal and organization form and a basis for achieving power sharing. All the groups benefitted from the cooperative in terms of financial and resource sharing which in turn created an ability to operate at a scale not possible on their own.

The description of the operations of the cooperatives included in the study all appear to be tight networks. The literature does point to places where loose networks are working for shared services. Specifically this is the case for the library cooperatives in rural areas of New York State.

Cross Case Comparison of Shared Services Cooperatives

While we attempted to cover the broad range of uses of the shared services model, we limited the discussion of specific cases to no more than five cases per sector for the cross case comparisons. The total number of cases analyzed in this study is 13 – three in the governmental chapter; three in health care; two in the financial sector; and 5 in the business sector. The cross case analysis method enabled us to see if there are generalizable patterns to the use of the shared services cooperative model both within and across sectors. On a practical level, it allows us to see under what circumstances, groups and organizations facing similar challenges may benefit from the development of a shared service cooperative. For purposes of the cross-case analysis, we compared the cases on the internal and external factors that led them to seek a collaborative arrangement with other organizations. The results of this comparison can be seen in table 1 below. The work of Miles, Huberman and Saldaña on strategies for cross case analysis informed the development of the analytic framework. Using a variable-oriented approach, we looked for themes or patterns in the role of internal and external factors that led to the development of the cooperative (Miles, Huberman, & Saldaña, 2014).

The case summaries are also provided in the appendix that examines the cases based on the theoretical framework presented in figure 1. A cross case comparison identified several themes that are discussed in this section of the paper. In the review of the cases, we see a set of themes emerge within the theoretical framework's elements of internal and external determinants; the organization focus, form and functions; and the outcomes in terms of the interoperability achieved, stage of maturity of the cooperative and the short, medium and long term impacts of the cooperative. Our within case descriptions were distilled into these key elements in examining each case.

Table 1: Cross Case Comparison

			Internal Factors								External Factors							
Name of co-op	State	Sector	Cost containment	Access to public funding	Qualified staff	Risk management	Afford- able it services & i innovation	Administrative challenges	Access to markets/competition	Need for democratic governance structure	Strong branding	Ability to access public funding	Professional standards required of staff	Competition	Rapid changes in technology	Ability to lower it costs	Ability to lower administrative costs	Risk management
SCLC	California	public	X	X	X	X	X	X		X		X	X		X	X	X	
WVWA	California	public	X	X	X	X	X	X		X		X	X			X	X	
LAGRIRWA	California	public	X	X	X	X		X		X		X	X		X		X	
HOSPITAL COOPERATIVE	All USA	healthcare	X	X	X	X	X	X				X	X	X	X	X	X	
RWHC	Wisconsin	healthcare	X	X	X	X	X	X				X	X	X	X	X	X	
PPC	Texas	healthcare	X		X	X		X			X		X	X		X	X	
Cooperative Financial Services	California	financial					X		X		X				X	X	X	X
PSCU	Florida	financial					X		X		X				X	X	X	X
SEATTLE MASSAGE	Washington	business	X		X	X		X	X	X	X		X				X	
CDS	National	business	X		X	X		X	X	X	X		X	X			X	
JOHNSTONE	National	business			X			X		X	X							
Carpet One	National	business	X						X		X		X	X			X	X
NISC		business	X			X	X	X		X			X	X	X	X	X	

From those descriptions, a list of determinants, processes and outcomes were developed. The cross case analysis then looked at how the cases compared on these various elements.

Collaboration is driven by both internal and external determinants in all of the cases. Cost containment appears as an important internal factor in all the cases. Administrative challenges has also been an important internal motivation in the creation of all the shared services cooperatives examined in this study. The use of a shared services cooperative was also cited in all but one case as the means to secure better-qualified professional staff.

Cooperative governance on a one member/one vote insures that all members have equal rights and equal voice. The structure in turn serves to equalize the members and reduces the likelihood of a collaboration becoming one dominated by the largest member of the cooperative. It is effective as a form that fosters trust and transparency in the organization. This was particularly important in the experience of the Los Angeles Gateway Region Integrated Regional Water Management Authority (GWMA), which has a well-established record as a form of collaboration that insures that all members of the cooperative come to the "table" as equals. It insures that all members are provided equal access and equal information about the activities and resources through their elected governing body.

The governmental case research generated a set of compelling external drivers for collaboration. The federal and local governments are able to use the incentive of access to funding only through collaboration. The requirements of transparency and shared governance in turn contribute to lowered risks of corruption and misuse of funds. The collaboration also serves as a mechanism for sharing between under resources and better resources jurisdictions.

The analysis of factors that motivated the creation of the cooperative found that it is often driven by both internal and external factors. In sectors regulated by the federal and/or state governments, those policies have been a driving force in the development of the cooperatives. The Joint Powers Authority in California (JPA) and federal funding have explicitly favored the cooperative form of collaboration. The regulatory burden would be too great for many small libraries, water districts and health care agencies. The cooperative can provide resources to preserve these institutions and strengthen their capacity to serve their target population.

Another key facet of this analysis is whether a tightly linked form to the cooperative is important to their success. In examining the cases, we found that it was standard practice in the cooperatives to have a regular schedule of meetings, typically once a month. The members participate in governance on a one-member one-vote basis. This would suggest a tight connectivity in the cooperative. The library research case found that the New York State library cooperatives have a loose network. The data suggests that the tighter the network, the greater the interoperability and variety of outcomes. Further research would be needed to test this hypothesis.

Shared services in all the cases studied have led to long term impacts in addressing organizational needs. All the cooperatives in this study have effectively served their members' needs. Whether it was a cooperative designed to enhance their competitiveness, or to lower the risks, to acquire new sources of funding or to allow the cooperative members to scale up or sustain the organization, the story has been the same. The cooperative works very well as a way to meet these varied needs.

Lessons from the Field for Further Shared Services Cooperative Development

The shared services cooperative model is a versatile and effective model for the provision of services that no one organization can provide for itself. The groups interviewed for this study have found the cooperative to be a valuable and effective vehicle for attaining resources and benefits to meet their needs. The model is relatively simple to organize. It requires a predevelopment phase for the participating members to determine whether this is a practical approach to meet their needs. As with all collaborations, it requires a period of meetings to establish common interests and to build confidence and trust in the relationship. This phase will benefit from the involvement of a consultant familiar with collaborations and cooperatives.

The development phase will vary with the nature of the cooperative. In many cases, it will likely require the continued involvement of a consultant and either tasking a staffer from one of the member organizations to lead the project or hiring a staff person to run the cooperative as it is gearing up for operation.

The cases studied here all have staff running the cooperatives. The smallest of the case examples was the Los Angeles Gateway Region Integrated Regional Water Management Authority (GWMA), which employs a part time manager with limited office staffing. The oversight of the budget is delegated to one of the member municipalities and is periodically rotated to another member to insure that the fiscal management stays free of corruption.

A cooperative can and probably should start with a small set of activities. In time, it can grow to provide a broader set of services to the members. Carpet One (CO) began with a focus securing exclusives and best pricing for members on wholesale purchasing of flooring. Today, it has a much broader scope of services for its members to insure they can remain competitive against the big box stores such as Home Depot and Lowes.

The Seattle Massage (SM) case is the one example of a shared services cooperative that operated successfully for many years and then closed. During the time of our research, it was sold to a private investor. The lesson from their experience stresses the importance of building a strong active membership and to establish reserves for economic downturns. The cooperative had incurred debt owed to some of the core members during a financial downturn. This debt discouraged potential members. An additional factor was the shift in the professional development by educators recommending that massage therapists seek employment in larger practices rather than self-employment, further reducing the entry of new members into the cooperative. Seattle Massage had also come to rely heavily on one member for administration of the cooperative. When he left for semi-retirement, the appeal of an offer for the business outweighed the loss of the cooperative. This case points to the importance of maintaining a healthy balance sheet and to continuing to remain relevant to current and future members.

In the business sector, there is an obvious question in the case examples of CDS Consulting and Johnstone Supply, "why a shared services model instead of a worker co-op or democratic employee stock ownership plans (ESOP)"? In both cases, a compelling case could have been made for a worker co-op. CDS Consulting did intend to form as a worker co-op. The members were already working as consultants and in deciding what they wanted from the cooperative, a shared services model fit with what they wanted from the cooperative.

In the case of Johnstone Supply, they could have employed the tax advantages of a conversion to an ESOP. Yet they opted instead to sell the stores to people who worked for them. This likely had advantages for retaining more control for the Shank family over the brand and the businesses. In an ESOP conversion, they would not have been able to retain as much control over the firm. The same would have been true in a conversion to a worker cooperative.

The National Information Solution Cooperative (NISC) members could have become very wealthy when Berkshire Hathaway (multinational conglomerate holding company) made an offer to buy the business. Instead, the co-op members rejected the offer for it would have made them vulnerable in a key business service for their members. Retention of ownership insures that they can still rely on great quality services that are responsive to changing technology and the needs of their members.

A key issue for shared services cooperatives is how to insure that they will continue to be relevant and of value to their members. As the cases discussed here illustrate, it takes a strong commitment to putting members at the heart of the cooperative's mission. Carpet One is a best case illustration of what it takes to be successful in member relations and retention. Carpet One saw only 1% of their members' fail in 2008 at a time when the industry lost 25% of retail flooring stores. Carpet One sees its members as family. In economic downturns, they help them renegotiate leases, and terms of credit. In natural disasters such as Hurricane Katrina, they help their members to get themselves back in operation.

Credit unions would have seen tremendous losses had they not been able to adapt to changing technology. Consumers want the ease of banking with ATMs and the ability to access services wherever they are. Big banks are able to do this. Credit unions overcame this challenge with shared services through Cooperative Financial Services network of ATMs and with shared branching that has allowed consumers to access their banking needs wherever credit unions are linked together. Credit union service organizations are providing these linkages and as we saw with PSCU, credit card services as well.

The versatility of shared services is a core strength of this model. The members can accomplish a wide range of benefits for themselves. Key to success is the development of trust and a set of services administered well and affordably. As long as the benefits are paying for themselves, members will join and continue to return year after year.

Conclusion

The objective of this empirical investigation is twofold. First, the authors document the use of shared services cooperative in the American economy. Second, they establish a model of this economy among cooperatives. Though the shared services model exists in various domains of the U.S. economy (government sector, parastatal sector, financial services, healthcare and business services), its application to cooperative is poorly documented. Little is known about the scientific application of shared services in the cooperative field. This study fills this gap.

There are many reasons that contributed to the confusion and lack of empirical investigation about shared services cooperative including the lack of concise definition of shared services and the emergence of the “sharing economy.”
The sharing economy creates a business platform on which independent contractors interact to produce service to users. This form of “sharing economy” is different from the shared services cooperative.
Cooperative members are the center actors in the shared services cooperative model. Members assume the risks and get the benefits of their enterprise in the shared services cooperative model.

The present study clarifies the distinction between the “sharing economy” and the shared services cooperative. More importantly this study establishes an understanding of shared services cooperative using a model that is predicated on internal and external factors. Using Palinkas et al. (2012) heuristic model of inter-organizational collaboration and the theory of social ecology, the authors investigated the internal structure of cooperatives and their external challenges.

The objective of this investigation was to assess the influence of these factors on the solutions (processes) cooperatives find to address the external environment challenges. This study reveals that the outcomes of the solution vary depending on the nature of the cooperative: healthcare, insurance, restaurant, hardware, carpet, etc.

Most cooperatives investigated in this study share similar internal structures and challenges. The most important ones were: cost containment, access to public finding and risk management. All these cooperatives also face similar external challenges including: rapid change in technology, lack of strong brand identity and the inability to lower administrative costs. The combination of these internal and external challenges trigger a desire of collaboration among cooperatives to improve their operational, managerial and logistical services.

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Appendix

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
Carpet One	Private for profit	Shared services have expanded as members have seen other benefits besides response to external pressures in shared risk; Improved operations through peer to peer learning; co-op sponsored training; Marketing resources with uniform branding	Members are independent small business owners who could not compete against big box stores, except through group purchasing & marketing which gives them proprietary products; Uniform branding; Shared resources in economic downturns and natural disasters	Focus: insure ability of independent small flooring businesses to remain competitive in their market; Function: multipurpose; Governance: through elected board and regional assemblies; Tight network between staff and members; Network: administrative organization	Members realize greater profitability, seamlessness between stores across regions; Strong peer to peer networking; Lower operating costs and proprietary products Stage of implementation: mature; Impact: ability to be competitive with big box stores; Improved profitability & sustainability
Cooperative Consulting and Development Services: CDS	Private for profit	The shared services model was considered the best fit for organizing a consulting group that also wanted to operate as a cooperative. The cooperative was established to address an administrative need for managing client requests,	The need to develop an independent organizational structure for a consulting group that had been a staff function in a regional nonprofit cooperative development organization	Function: collaboration in business expertise and in administrative services; Billing and distribution of profit and coordination between consultants of services; Sharing of information about clients served by multiple consultants;	Outcomes: Efficient billing services and coop- client Relationship; Stage of implementation: mature; Impacts include: *consistent growth: double digit growth

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
		and billing, marketing while allowing the consultants to provide services; Members must provide high quality service; Consulting must be administered through the co-op when consulting with cooperatives.		Formal organization with tight network; Governance: strong member engagement with democratic governance; Network: administrative organization	*Profit: every year except one; *Provide a platform for consultants to offer their services; Stronger resource serving co-op development especially in retail food cooperatives
Hospital Cooperatives	Private, nonprofit	Characteristics of the member organizations: hospitals & rural clinics; Characteristics of individual actors: staff of hospitals & rural clinics	Availability of funds: access to Federal and State funding; Failure of government to regulate cost of medical care and pharmaceuticals; Government Mandates: compliance with State & Federal requirements; Geographic area: low income versus high income; rural/suburban/urban; Target Population/market	Focus: improve quality of care through shared equipment, group purchasing & peer to peer review; Loose & tight networks: loose networks that come together for resource sharing; Function: multipurpose – funding, purchasing, innovation, resource sharing; Formality: separately incorporated governance: democratic representation on board of all members but weak member engagement; Systemic levels: local network, administrative organization	Outcome: Enterprise integration & interoperability: technically optimizes integration for administrative services; Stage of implementation: mature; Impact of Shared Services Cooperative – cost containment, quality improvements

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
Johnstone Supply	Private for profit	* Very basic business structure; * Each operator has a territory; * Close-knit relationship between entities; * Experienced in operation, management and logistics; * Lack of effective governance structure; * Conflict of interests; * Desire for control and strong personality; * Members contribute and benefit equally; * Strict rules about each territory; * Difficult to welcome new members	* Retiring owner succession plan for the company using an employee stock ownership conversion, but with a shared services co-op to enable the group to continue to operate under uniform branding at a national level while transferring some territories to family members and others to regional managers.	Focus: Collaboration in distribution, buying process, order placement and employee's growth; * The distribution centers conduct cost, merchandise payment and delivery negotiations; * Provide "Bulk orders" and "drop shift" to members; * The Johnston Supply provides extensive training programs to members; * Assist members in the implementation of their day-to-day activities; Governance: democratically elected board that nominates a slate with opportunities for nominations from the floor; Network: administrative organization	Outcome: Increased profits; * Increased patronage to members; Stage of implementation: mature; Impact: effective succession plan at retirement of owner with transition broader ownership base of regional operations

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
Landscape Conservation Cooperative (LCC)	Public/ Private Partnership	22 each of the partnerships (public and private partnerships) are very big in scale, 100 of millions of acres that encompass now the entire continental US, Alaska parts of Canada and parts of Mexico and into the Caribbean. Initiated by the US government on a co-op model since track record of co-ops effective in conservation; Transnational in scope with public/private partnership	Need for coordination of multiple stakeholders committed to science-based, voluntary action to preserve ecosystems; Benefits to members in terms of supporting stated mission to preserve ecosystems and ability to leverage resources; US government provides matching funds for LCC projects.	Focus: Coordination across all 22 partnerships but each co-op has a self-determined governance that is transparent; Agencies and organizations include: tribes, non-government organization such as a nature conservancy. It includes a variety of State agencies, wildlife agencies, industry and other folks; 280 different organizations; No joining fee nor annual membership fee; Members contribute to resources with efforts on a voluntary and as needed basis; Self-governed network	Outcome: Corporate website reports on strategic planning and various conservation projects up till 2017. No new updates subsequently. Stage of implementation: emerging Impact: ability to coordinate conservation across large regional areas
Southern California Library Cooperative	Public	Risk taking; Access to equity capital; Challenge of recruiting librarians with professional qualifications in more rural communities	Compliance with government mandates and financial incentives; Resource sharing for income & geographically segregated communities	Focus: enhance professionalism; Optimize cost sharing & technical innovations; Loose network in NY & tight network in CA of economically & geographically diverse communities;	Output: Technical integration; Greater resource capacity to serve members' communities due to outside funding & sharing of members' collections; Stage of implementation: mature;

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
				Frequency: monthly meetings of members, varied in frequency of other communication; Function: multipurpose – funding, purchasing, innovation, resource sharing; Formality: separately incorporated governance: democratic representation on board of all members; Systemic levels: regional; Network: administrative organization	Impact of shared services Cooperative – greater financial resources, & professionalism, innovation, improved level of services in a mature well established cooperative.
Los Angeles Gateway Region Integrated Regional Water Management Authority	Public	Characteristics of the member organizations: municipalities in the Los Angeles River watershed seeking to share risk, reduce potential for corruption and to have access to equity capital; Characteristics of individual actors: technically & professionally qualified.	Availability of Funds: access to Federal and State funding; Compliance with State & Federal requirements; Geographic area: low income and high income; rural/suburban/urban; Target Population/market: municipal water authorities	Focus: optimize cost sharing & lower risks & realize technical innovations; Tight network of economically diverse jurisdictions; Frequency: monthly meetings of members, varied in frequency of other communication; Function: multipurpose – funding, purchasing, innovation, resource sharing;	Output: Influence Network: Enterprise integration & interoperability optimizes integration for technical and sharing of lending resources & public advocacy; Stage of implementation – mature; Impact of Shared Services Cooperative – greater financial resources, lower

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
				Formality: separately incorporated; Governance: democratic representation on board of all members; Systemic levels: regional; Network: administrative governance hybrid with lead organization network	cost to residents for water; Environmental improvements & improved level of services
National Information Solutions Cooperatives (NISC)	Private, for profit	Characteristics of the member organizations: must be a public utility, power system or a communication cooperative serving at least 500,000 customers; * Undercapitalized operation; * Regional operation: potential members must purchase technology and data processing services from NISC; * Non-members (Municipalities and public utility districts) are allowed, but must	* Competition	Focus: work together to share information technology services, data processing service and engineering services; * Specialized software that serves members' needs; * Participate in focus groups; * NISC software in integrated with members' technology system; * Members share profits and losses; * Members vote to elect the advisory board members	Output: specialized software that serve members' needs; * Important capital credit; * Members generate business ideas for NISC (Effective participation); Stage of implementation: mature Impact: high quality specialized software that meets members' needs and generates additional revenue for members from sales to non-members

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
		purchase engineering, accounting and billing services from NISC; * Members' long-term commitment		Tight network: close connection between members and staff; Network: administrative organization	
Patients/Physicians Cooperatives, Texas	Private non-profit	Characteristics of the member organizations: private medical practices that are committed to higher quality medical & wellness care & elimination of for-profit third-party interests; Characteristics of individual actors: physicians & other allied health professionals' qualifications	Availability of Funds –failure of government to regulate cost of medical care and pharmaceuticals; Government Mandates: compliance with State & Federal requirements Geographic area: low income versus high income; rural/suburban/urban Target population/market	Focus: enhance patient/physician relationship; Eliminate third party profiteers; Promote transparency & demystify the health care costs; Loose & tight networks: tight network between 3 Patient/Physician cooperatives & tighter relationship between doctors & patients characterized by flexibility & responsiveness with strong emphasis on preventative care; Function: multipurpose – funding, purchasing, positive deviance from norms of physician/patient care;	Output: enterprise integration & interoperability: technical optimizes integration for administrative services; Stage of implementation: mature; Impact of shared services Cooperative – credentialing services for physicians; Affordable health insurance for consumers; Startup financing for expansions and new cooperatives

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
				Innovation, resource sharing Formality: separately incorporated governance: democratic representation on board of all members Systemic levels: local	
Patients/Physicians Cooperatives, Oregon	Private non-profit	Characteristics of the member organizations: private medical practices that are committed to higher quality medical & wellness care & elimination of for-profit third-party interests; Characteristics of individual actors: physicians & other allied health professionals' qualifications	Availability of funds: failure of government to regulate cost of medical care and pharmaceuticals; Government mandates: compliance with State & Federal requirements Geographic area: low income versus high income; rural/suburban/urban; Target population/market	Focus: enhance patient/physician relationship; eliminate third party profiteers; Promote transparency & demystify the health care costs; Loose & tight networks: tight network between 3 Patient/Physician cooperatives & tighter relationship between doctors & patients characterized by flexibility & responsiveness with strong emphasis on preventative care; Function: multipurpose – funding, purchasing, positive deviance from norms of physician/patient care; Innovation, resource sharing;	Output: enterprise integration & interoperability: technically optimizes integration for administrative services; Stage of implementation: emerging; Impact of shared services Cooperative – credentialing services for physicians; Startup financing for expansions and new cooperatives

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
				Formality: separately incorporated governance: democratic representation on board of all members Systemic levels: local	
Rural Wisconsin Hospital Cooperative	Private nonprofit	Characteristics of the member organizations: hospitals & rural clinics; Characteristics of individual actors: staff of hospitals & rural clinics	Availability of funds: access to Federal and State funding; Failure of government to regulate cost of medical care and pharmaceuticals; Government Mandates – compliance with State & Federal requirements; Geographic area: all incomes; rural and urban Target Population/market: Wisconsin residents, primarily rural	Focus: improve quality of care through shared equipment, professional development of staff; Advocacy, group purchasing & peer to peer review; Preserve rural access to health services. Loose & tight networks: loose networks that come together for resource sharing; Function: multipurpose – funding, purchasing, innovation, resource sharing; Formality: separately incorporated; Governance: democratic representation on board of all members; Systemic levels: local network, Administrative organization	Output: Enterprise integration & interoperability: technical optimizes integration for administrative services; Stage of implementation Well established; Impact of shared services Cooperative – cost containment, quality improvements, improved staffing, & preservation of rural health services

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
Seattle Massage	Private, for profit	Characteristics of members: massage therapists; Characteristics of individual actors: licensed, professional massage therapists who are independent contractors who were attracted to the co-op for strong brand identity; Centralized scheduling, billing and facilities; * Members are free to leave the coop and remain members; * Members are required to pay 40% to 45% of their earnings to the coop	* Competition	Focus: to offer independent massage therapists the benefits of shared facilities, scheduling and billing; Function: enable therapists to focus on work with clients rather than on running a business; Formality: separately incorporated. * Parent organization purchases insurance for members; * Makes frequent changes to its model to adapt to therapists' needs* Collaboration: first aid classes are offered to members; Members take the class at a cheaper rate; Continuing education classes are offered to members; Lead organization network	Output: efficient services; Stage of implementation: sold to private for-profit entity due to changes in professional environment & weak financials. They had difficulties recruiting new members; Impact: effectively served members' needs till founder who did lead management of the co-op for over 30 years before he retired

Name of co-op	Sector	Internal factors that led to collaboration	External factors that led to collaboration	Collaboration characteristics	Outcomes
Walnut Valley Water Authority	Public	Characteristics of the member organizations: risk taking; access to equity capital; Characteristics of individual actors: technically & professionally qualified	Availability of funds: access to Federal and State funding; Compliance with State & Federal requirements; Geographic area: low income versus high income; rural/suburban/urban; Target population/market: municipal water authorities	Focus: optimize cost sharing & lower risks & realize technical innovations; Loose & tight networks: Diverse; Frequency: monthly meetings of members, varied in frequency of other communication; Function: multipurpose – funding, purchasing, innovation, resource sharing; Formality: separately incorporated; Governance: democratic representation on board of all members; Systemic levels: regional; Network: administrative governance	Output: Influence Network: Enterprise integration & interoperability optimizes integration for technical and sharing of lending resources & public advocacy Stage of implementation: mature Impact of shared services Cooperative – greater financial resources, lower cost to residents for water; Environmental improvements & improved level of services

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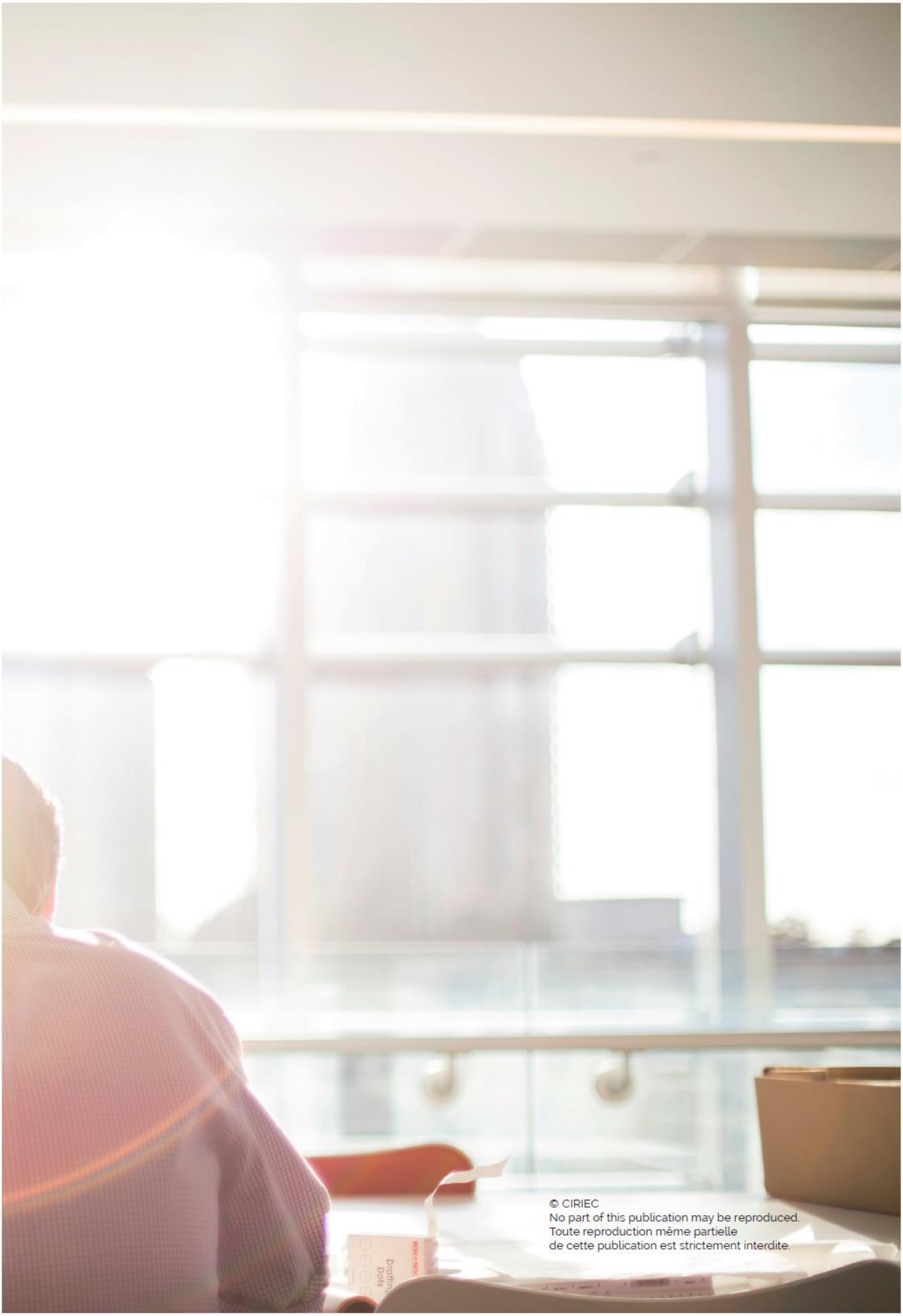

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