

COST-OFFSET CONTINUATION PLANNING FOR FARMERS

A GUIDE FOR REGIONAL COACHES



Cornell University



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL



CO-CSA Continuation Planning: A Guide for Regional Coaches is part of a research study led by Dr. Rebecca Segun in the Division of Nutritional Sciences at Cornell University, and implemented through a collaboration between University of North Carolina at Chapel Hill (Dr. Alice Ammerman), East Carolina University (Dr. Stephanie Jilcott Pitts), The Evergreen State College (Marilyn Sitaker), University of Vermont (Dr. Jane Kolodinsky), and Cornell University (Dr. Karla Hanson). The study is funded by the Agriculture and Food Research Initiative Competitive Grant Number 2015-68001-23230, from the USDA National Institute of Food and Agriculture. ClinicalTrials.Gov Identifier: NCT02770196.

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PROJECT SUMMARY

Community Supported Agriculture (CSA) may hold potential for helping reduce childhood obesity by increasing consumer access to and consumption of fresh produce. But for low-income families at increased risk for obesity, the up-front cost of a CSA may be a barrier to participation. Thus, the *Farm Fresh Foods for Healthy Kids* study is testing whether a cost-offset CSA (CO-CSA, which may also be known as a subsidized CSA), when complemented with tailored education, can help increase fruit and vegetable consumption for these families, while also opening a new market segment for CSA farmers. For a full description of the study, please refer to [Appendix I](#).

This study is funded by the United States Department of Agriculture, and provides funding for a 50% CSA subsidy to 12 participating farms in 4 states (NC, NY, VT, and WA). It also links farmers with new customers for the CO-CSA. In the first year, researchers conducted formative research with farmers who were already offering CO-CSAs, full pay CSA members, and low-income consumers. Throughout the study thus far, our researchers have gained feedback on the CO-CSA model from low-income study participants, conducted interviews with the farmers in our study to explore the challenges and benefits of implementing a CO-CSA, and completed an economic evaluation of how the cost-offset CSA adds to farmer revenue and contributes to local agricultural economies.

PLANNING FOR SUSTAINABILITY

The design of this study is known as a delayed intervention randomized trial. This means that each individual is randomized to either receive the intervention (a CO-CSA and education classes) immediately, or receive it at a later, pre-determined time (e.g. the following year), hence the “delayed intervention”. On average, participant farms in this study enrolled eight intervention CO-CSA participants in summer 2016 and 17 for summer 2017.

2018 will be the final year of implementation for farmers engaged in this study, and we estimate an average of nine intervention CO-CSA study participants per farm. However, since some previous CO-CSA consumers may wish to continue with a CO-CSA, the 2018 season is a good opportunity to help farmers find ways to raise funds to cover the cost-offset portion of a CSA for these families. Additionally, some farmers have asked for guidance on the best way to recruit additional low-income families, even if they may not be ready to attract new CO-CSA members for the 2018 season.

In March of 2017, farmers in the study attended a webinar to learn about current research on what low income consumers want from direct market channels, and how other farms fund and market their CO-CSAs. Researchers have developed tools and assembled coaching teams to guide study farmers through a process to identify and test strategies during the 2018 growing season that will allow them to continue to offer the CO-CSA after study funding ends. This year-long process contains the following activities:

Activity	Date
1. Online CO-CSA Continuation Planning Workshop	October 2017
2. In-person coaching session to develop Continuation Plan and 1-page Plan Summary	November 30, 2017
3. Farmer group call to share highlights of each Continuation Plan	December 2017
4. Plan implementation with 2 check-in sessions with regional coaching teams by phone or in person	January-April 2018
5. Post-season, in-person debriefing session with regional coaches	October 2018
6. Final Farmer Group Call to share successes, challenges and lessons learned	October 2018

The following pages are designed to provide Regional Coaching Teams with background information, additional resources, and instructions on how to coach CO-CSA Farmers through the process of developing and implementing their Continuation Plans.

CONTINUATION PLANNING SESSIONS:

PREPARATION

This Guide shows examples of each Worksheet, instructions for how to fill them out, and coaching tips. Coaches will also receive an Excel Workbook containing worksheets that are pre-populated with data specific to each farm in their state. The farmer will receive a similar set of worksheets with the same set of questions, but without the coaching tips and without the Excel file.

To prepare for an individual coaching session with each farmer in your state, you should complete the following steps:

- a. Teams should review the CO-CSA project summary ([Appendix I](#)), the Continuation Planning Worksheets and the Evaluation materials contained in this Coaching Guide. Reach out to Marilyn Sitaker (msitaker@gmail.com) with questions, as needed.

- b. Coaching partners should coordinate scheduling dates and times to hold planning sessions that consider a farmer's availability and preferences.
- c. Prior to holding each planning session, prepare a list of potential funders, community based organizations and social service agencies that serve low-income families in each community where participating farms are located. See Appendix I for an example.
- d. **Print out a set of paper worksheets** (found in [Appendix VII](#)) for each farmer prior to the planning session. The farmer should fill these out by hand. Load the Excel spreadsheets for each farm onto a laptop or tablet, and bring the device with you to fill out with the farmer.

PLANNING SESSIONS

Planning sessions will take place after the Fall 2017 Workshop, with the goal of developing a rudimentary Continuation Plan by the end of November. Coaching teams will help farmers go through each worksheet.

Though farmers will get an electronic set of Continuation Planning Worksheets after the Workshop, they may not take time to review it. Therefore, coaches should be prepared to walk farmers through each worksheet, explain its purpose and how it fits into the overall Continuation Plan. Farmers will not need to do any preparation prior to the planning session, nor do they need to bring any farm records with them.

After Farmers develop their plan, they will need to develop a Plan Summary for the upcoming season using the Summary Template. After the coaching session, print out three (3) copies of the Excel Worksheets, the planning worksheets, and the Plan Summary. Give one set to the farmer, mail one set to Marilyn Sitaker, and keep one set for your team.

Complete the post-session evaluation (see [Appendix V](#)).

In December, there will be a group conference call for Farmers to share highlights of their Continuation Plan. They will only have about 5 minutes apiece to share –so, the coaches should help guide them in choosing one key component to share from their Plan Summary.

The next section contains all the **CO-CSA Continuation Planning Worksheets**, including those that will be filled out in Excel, along with instructions for filling out each sheet and special tips for the coaching teams (in blue italics). Worksheet instructions in this section are written for the farmer, who will receive a duplicate set of worksheets, but without the Excel file or the coaching tips.

WORKSHEETS

1. ARTICULATING VALUES, MOTIVATION, RISKS AND VISION

Your values are the foundation for the decisions you make about your farm. Stating your values helps to frame the planning process, and form the core of your marketing messages for your CSA in general, and the CO-CSA in particular. Please record your answers to questions on the **Values and Vision Worksheet**, below.

Coaching Tip: The values worksheet helps farmers articulate what is most important to them in making business decisions. Values also come into play in fundraising, outreach to existing CSA members, and developing marketing materials to attract new low-income families for the CO-CSA. Worksheet 1 should be in paper format, and filled out by hand by the farmer.

WORKSHEET 1: VALUES AND VISION

Values -- Values are core beliefs and philosophies that reflect your view on life. They often influence your goals and business decisions and help guide management of your farm:

- *What values guided your decision to initiate a cost-offset CSA for low-income households?*
- *How important is it to you to include low-income households as customers?*

Motivation

- *What do you see as the benefits of running a CO-CSA?*
- *How important is it to you to continue your cost-offset CSA after the research project ends?*

Risk-- All business decisions carry some level of risk. Though many potential problems never come to pass, it's important to honestly assess the riskiness of new ventures, consider the risks compared to potential benefits, and determine your comfort level with your decision.

- *What do you view as the risks associated with running a CO-CSA? How do these risks compare with other risks of farming?*
- *How do the risks of running a CO-CSA compare with the benefits?*
- *How comfortable are you with these risks---particularly financial risk?*

Vision-- A vision statement describes the big picture of your business, and your farm's cost-offset CSA, over time. It defines an ideal future and impacts on your local community or society in general.

- *How does the CO-CSA fit with your overall vision for your farm?*
- *What would you like your cost-offset program to look like in 5 years?*
- *What would you like your cost-offset program to look like in 10 years?*

Value Proposition – A value proposition can be thought of as “your promise to your customer.” It tells them what they can expect from your products and services, and what differentiates your offering from that of your competitors. Your value proposition should reflect your core values and vision to your customers.

What succinct statement would you use to describe your CO CSA? Example: “Purchasing a CO-CSA from our farm gives you healthy local foods throughout the growing season at a fair price”

2. IDENTIFYING CO-CSA FUNDING SOURCES

2A. CO-CSA Funding Preferences. In addition to the “Pros/Cons” we shared in the Workshop, we provide a tool designed to help you explore each funding option within the context of your own local situation. In Worksheet 2A, you will list the pros and cons of each option according to your own situation, then rank the strategies from 1-8, with 1=the best and 8=the least preferred option.

Coaching Tip: The Workshop includes a slide on generic “pros” and “cons” of each funding option. Your farmer may think of additional points related to their unique local context to add in each column, or may note those already shared in the Workshop. It’s up to the farmer to rank each strategy according to which strategies seem more or less feasible to them. Your role is to provide a sounding board as they weigh the pros and cons of each option.

WORKSHEET 2A: PREFERENCES FOR FUNDING CO-CSAS

Source of CO Funds	How it works	Pros	Cons	Rank
Sliding scale and/or donations from full-pay members	Full pay CSA members volunteer to pay more so that low-income members can pay less			
Grants	A public or private entity provides some or the CO			
Fund-raising through community events	Farmers raise the CO funds through on-farm events, or by joining in community events			
Work-shares, bartering, and pick-your-own shares	CO offered to CSA members who work on the farm, pick their own produce, or barter			
Parent business or side business funds CO-CSA	Profits from separate farmer-owned business support the CO			
Partnering with existing non-profit CO-CSA Hubs	A non-profit secures CO funding and markets to low income customers			
Partnering with other partnerships	A partnership of health plans, hospitals, and businesses offers CO-CSAs through partner			

	farms			
Product sales (T shirts, canvas bags, hats with farm logo, etc.)	Farm sells product like T-shirts or bags and the profit goes toward CO share			
Farm write-offs	Farmer absorbs CO as a business loss			

2B. Funding strategies for 2018: For the next worksheet, select one or more funding strategies you would like to try for the 2018 season, and write in the steps you will need to prepare for each one.

- If you selected grant funding, your coaching team can provide advice about local sources of grant funds.
- If you selected fund-raising or community events, [Appendix III](#) provides examples of attractive materials that could be adapted for these purposes.

Coaching Tip: Here's where the real planning begins! Remember, farmers can choose multiple strategies, but not necessarily work on all of them in the first year. For example, they may wish to focus on sliding scale this year, and wait until the following year to conduct a fundraising campaign among local businesses. Note: Links to funding resources including tips for grant writing, can be found in [Appendix III](#). Make sure to bring your compiled list of local Foundations and other local sources of funding to share with each farmer.

Note: There are small, community banks that offer community grant funds that might be an option for some farms...This may be a possibility worth exploring.

WORKSHEET 2B. CO-CSA FUNDING STRATEGIES TO TRY IN THE 2018 SEASON

Strategy	Steps to prepare for this funding strategy	Timeline
Example: 1. Sliding scale	<p>1. Share information about current CO-CSA with full pay members during 2017 season on website and in newsletters. Include quotes and photos (with participant permission)! Add an option on the member sign-up form for members to make an additional donation to offset the cost of the CO-CSA.</p> <p>2. Publicize sliding scale option for full pay, with suggested donation amounts via newsletters, social media, in combination with farm events. Start taking names of Full share members who wish to donate extra funds.</p> <p>3. Set up CO-CSA account to pool donated funds</p>	<p>1.November-December 2017</p> <p>2.January-March 2017</p> <p>3.January 2018</p>

2. Etc.	1. Etc.	1.
	2.	

3. SETTING FUNDING TARGETS

The following tools will help you estimate how much money you need to raise to fund the cost-offset, based on how many CO-CSA shares you want to offer and the size of the discount (cost-offset) you want to use.

3A. Select a % Cost-Offset

You will use Worksheet 3a in the [Excel Spreadsheet](#), to determine how much of a discount (cost-offset) you want to offer. On line 1, record the share sizes you offer and the full-pay price for each size (blue shaded row). Prices for each size will be calculated automatically for each share size under various scenarios (50%, 33.3%, or 25%).

“Discounted price per season” refers to what the low-income customer will pay; *“Price to be offset via funding strategies”* refers to how much you will need to raise for each CO-CSA share, using funding strategies you selected in Worksheet 2b.

Now, review the calculated *discounted price* and *price to be offset* for each Scenario. Select the Scenario that seems best for you. For the Farm Fresh Foods for Healthy Kids Study, we used a cost-offset of 50%, but you may choose to offset 33%, 25%, or some other amount. Using a lower discount means that your low-income members will pay more, but it also means that you will need to raise less in CO-funds and/or be able to offer more CO-CSA shares.

Coaching Tip: As needed, help the farmer enter “Full price per Season” for each share size offered into the [excel spreadsheet](#) provided for this purpose. The spreadsheet contains simple formulas to calculate how many CO-CSA shares can be offered based on available funds raised through strategies identified in Worksheet 2. Shaded cells in Worksheet 3b, below, are the cells that are calculated based on formulas in excel. Contact Marilyn Sitaker (msitaker@gmail.com) if your farmer is interested in calculating prices based on a different Scenario than those that appear in the Excel Spreadsheet.

WORKSHEET 3A. CO-CSA PRICE AND CO, BASED ON VARIOUS SCENARIOS

	Share size		
Share Price	Small (6-8 items)	Medium (8-10 items)	Large (12-14 items)
1. Full-pay price per season	\$475	\$570	\$760
Scenario 1: 50% CO			
2. Discounted price per season	\$237.50	\$285	\$380

	Share size		
3. Amount to be offset via funding strategies	\$237.50	\$285	\$380
Scenario 2: 33.33% CO			
4. Discounted price per season	\$316.67	\$380	\$506.67
5. Amount to be offset via funding strategies	\$158.33	\$190	\$253.33
Scenario 3: 25% CO			
6. Discounted price per season	\$356.25	\$427.50	\$570.00
7. Amount to be offset via funding strategies	\$118.75	\$142.50	\$190.00
8. What % CO will you offer? (choose one) <input type="checkbox"/> 50% <input type="checkbox"/> 33.3% <input type="checkbox"/> 25% <input type="checkbox"/> Other: _____			
9. Copy the <i>Discounted price per season</i> from the Scenario you have chosen to use			
10. Copy the <i>Amount to be offset</i> from the Scenario you have chosen to use			

3B. Count CO-CSA participants

In this step, you'll determine how many CO shares you'll want to raise funds for in 2018. This includes study participants whose CO-CSA was formerly funded by the study ("former CO-CSA study participants"), and new low-income CSA members you'd like to sign up through marketing efforts.

You'll also want to consider the total number of CO-CSA members **overall**, by adding in study participants whose CO is still funded by the study. Examining these numbers will help you determine whether in 2018 you want to raise funds for fewer former CO-CSA participants than are available, delay outreach to new customers until a later date, or both.

For Worksheet 3b in the Excel spreadsheet, **Lines 1 and 2** (number of existing CO-CSA customers associated with the study) will be pre-populated with data for your farm. **Line 3** asks you to determine how many former CO-CSA study participants you want to find funding for, and **Line 4** asks how many new customers you'd like to attract through your marketing efforts. **Line 5** automatically calculates the total number of customers you'll need to find funding for, and **Line 6** automatically calculates the number of CO-CSA members you will have overall.

Look at these last two lines, and decide whether you are comfortable with these numbers. Feel free to adjust Lines 3 and 4 in the Excel spreadsheet until you get a **total number of shares to find funding for** that you are satisfied with.

Coaching Tip: In this worksheet we are asking farmers to think about how much they can raise in CO funds, as well as how many CO-CSA members they have capacity to serve. Lines 1 and 2 will be pre-populated with site-specific data for each farm. Lines 4 and 5 will be determined by the farmer. For Line 4, the farmer may wish to only retain those Group 1 and Group 3 CO-CSA members who have proved to be conscientious in picking up and paying each week. It's ok if farmers choose to put off finding new CO-CSA members in 2018 (Line 3)—they can enter zeros across the board. Once they've filled out the spreadsheet, prompt them to talk about their comfort level with the number of CO-CSA members they will have overall. If they would prefer fewer customers overall, they can adjust lines 4 and 5 until they arrive at an overall number they are satisfied with.

WORKSHEET 3B. NUMBER OF CO-CSA PARTICIPANTS FOR 2018

	Small (6-8 items)	Medium (8-10 items)	Large (12-14 items)	Total Overall
1. Estimated number of CO-CSA participants funded by the study	4	3	2	9
2. Estimated number of former CO-CSA study participants, potentially interested in continuing their CO-CSA membership	7	3	2	12
3. How many of these former CO-CSA study participants will you fund?	5	2	1	8
4. How many CO-CSA shares would you like to offer to new members?	3	3	0	6
5. Total # shares to find funding for (sum, lines 3& 4)	8	5	1	14
6. Total CO-CSA participants (sum, lines 1& 5)	12	8	3	23

**Not all former CO-CSA study participants may wish to continue in 2018, but this will give you an idea of the maximum number you might have.*

3C. Determine Funding Targets

In this step, you will determine the how much money you need to raise to pay for the number of CO-CSA shares you want to offer. Line 1 of Worksheet 3c in the Excel Spreadsheet, (**Price to be offset**) will be populated automatically, with data from Worksheet 3a, line 9 and Worksheet 3b, line 5.

WORKSHEET 3C. CO-CSA FUNDING TARGET

	Share size			Total funds Needed
Scenario 1: 50% Cost-Offset	Small (6-8 items)	Medium (8-10 items)	Large (12-14 items)	
1. Amount per share to be offset via funding strategies (Worksheet 3A, line 9)	\$237.50	\$285	\$380	
2. Total # shares to find funding for (Worksheet 3B, line 5)	8	5	1	
3.CO funds needed (auto-calculated)	\$1,900	\$1,425	\$380	\$3,705

Line 2 of Worksheet 3c, (**Total # shares to find funding for**) will also be populated automatically, with data from Worksheet 3b, line 5. Line 3 of Worksheet 3c (highlighted in blue, below) will automatically calculate the funding targets for each share size, and overall.

3D. Funding targets by source:

For Worksheet 3d below, write in the various funding sources you want to work with, and the target amount to be raised using each source from Worksheet 3c, line 3. Select a target date(s) by which funds must be secured, so that you can determine how many actual CO-CSA shares you can offer. Later, you can record the amount(s) you have secured from each source by that date in the far right-hand column. You will need to know this to determine how many CO-CSA participants you can accept for the 2018 season.

WORKSHEET 3D. CO-CSA FUNDING TARGET BY SOURCE

CO-CSA Funder	Funding Target	Funds secured by [target date]
Funder 1	\$	\$
Funder 2	\$	\$
Funder 3	\$	\$
Total (from Worksheet 3C, line 3)	\$3,705	

If you are unable to meet your funding goal, you will not be able to offer as many CO-CSA shares as originally planned. You can go back and revise line 2 in Worksheet 3c, based on this lower amount. Feel free to contact your Coaching Team for help if needed.

What to do if you have more interested people than funding for the CO-CSA?

You may want to decide ahead of time what to do if you have not raised enough CO funding to subsidize shares for all the people who want them. This includes how to allocate the number of CO-CSA shares available to the applicants, and making plans to refer those who do not get a CO-CSA share that year to other community resources (see Appendix I). Record your decisions on Worksheet 4B.

Alternatively, you may wish to recalculate the number of CO-CSA customers you can accept after adjusting the CO from 50% to 33.3% or 25%, using the Worksheet 3b and Worksheet 3c. Feel free to contact your Coaching Team for help if needed.

Coaching tip: Farmers may wish to do a random drawing to decide who can receive the available CO-CSA shares to fund. Alternatively, they might accept former CO-CSA study participants based on the order in which they indicate an interest in continuing the CO-CSA in 2018. The remaining customers could go on a waiting list, and be signed up for a CO-CSA share when additional funds become available. Contact Marilyn Sitaker (msitaker@gmail.com) for help calculating how many CO-CSA customers can be covered by changing the % of the CO, if funding targets aren't met.

4. MARKETING TO LOW-INCOME CUSTOMERS

This section covers Marketing Strategies to attract new low-income customers, and retain existing customers. You may decide that in 2018 you will focus on fund-raising to retain former CO-CSA study participants and wait until the following year to reach out to attract new low-income customers. Still, the following worksheets will help you plan your CO-CSA operation in a way that will help retain existing customers, and attract new customers this year or in the future.

Coaching Tip: This section will make use of information gathered by coaching teams on local social services agencies like food pantries and soup kitchens under the last column in Worksheet 4A, "How can you get this information." These sources may help shed light on the specific food preferences of low-income families in the farmer's community, or confirm what the farmer has already learned through participating in the CO-CSA study.

4A. Information about Local Low-Income Families: To better market the CSA to low-income customers, it helps to know what is important to them. This is also important in making decisions about CO-CSA operations that affect customer retention. While we previously discussed general characteristics from past studies as well as our own formative interviews (see [Appendix VI](#) for a summary of the data), you may want to better understand the preferences of low-income families in your own community. The following worksheet will help you identify what kind of local information you have, as well as information you would like to acquire.

WORKSHEET 4A. INFORMATION ABOUT LOCAL LOW-INCOME FAMILIES

	What do you already know about low-income families in your area?*	What would you like to know?	How can you get this information?
Produce preferences			
Pricing preferences			
Box size preferences			
Pick-up frequency preferences			
Pick-up location preferences			
Preferred marketing/communication channels			

*Can be based on your personal experience with low income families in your community or existing CO-CSA customers, or on information from talking to local extension or food banks and other service providers in your area. Ask your coaching team about the list they have compiled of local organizations that address food security issues in your area.

4B. Logistics for CO-CSA operations

Next, consider whether you want to make any changes in the logistics of your CO-CSA operations, to accommodate the needs of CO-CSA families. Taking the preferences of low-income families regarding pricing, payment plans, pick-up locations and times, can help make the CO-CSA more appealing to low- income customers, overcome barriers to participation, and make it easier to continue with the CO-CSA. Just make sure that whatever you decide also works for you!

You may choose to follow the same pattern of operations used for CO-CSA study participants, or develop new practices based on your experience over the past few years. On Worksheet 4b, record your decisions about how the CO-CSA will operate in the 2018 growing season.

Coaching Tip: Again, [Appendix VI](#) which summarizes what we have learned so far in our study, may be helpful. Nutrition education may be a crucial factor in retaining CO-CSA members. Linking to programs offered by Extension, Expanded Family Nutrition and Education Program (EFNEP) and other educational resources can help CO-CSA participants learn how to prepare, store, cook and enjoy fresh fruit and vegetables.

WORKSHEET 4B CO-CSA LOGISTICS

Questions	Decisions
Will you continue to accept SNAP/EBT?	
Will you use the same eligibility criteria as the study, (participation in SNAP, WIC, school or summer lunch programs or income $\leq 185\%$ of federal poverty guidelines) or some other criteria?	
What will the approval process be? Options include first-come first served, random selection, priority given to previous past share members, etc.	<input type="checkbox"/> First-come first served <input type="checkbox"/> Random selection <input type="checkbox"/> Priority given to previous past share members <input type="checkbox"/> Other (write in): _____
What information will you give to CO-CSA applicants who are not selected for a cost offset CSA in 2018?	<input type="checkbox"/> Refer them to another CSA in their area, the local food pantry (see Appendix I, Food Security Landscape) <input type="checkbox"/> Other (write in): _____
CO-CSA Payments How will CO-CSA consumers pay the balance?	Check as many as apply: Consumers can use... <input type="checkbox"/> cash <input type="checkbox"/> check <input type="checkbox"/> credit card <input type="checkbox"/> debit card <input type="checkbox"/> other (write in): _____

Questions	Decisions
What kind of flexible payment plans/deferred payments will you accept? (see Appendix IV for various payment plans.)	<p>Payment accepted:</p> <ul style="list-style-type: none"> <input type="checkbox"/> weekly <input type="checkbox"/> bi-weekly <input type="checkbox"/> monthly <input type="checkbox"/> in full for the season
Will you allow SNAP/EBT members to pay for as many pick-ups as fit within a 14-day period? (Note, this may require more careful record keeping)	<ul style="list-style-type: none"> <input type="checkbox"/> Yes (See Appendix IV) <input type="checkbox"/> No
<p>Pick Up Locations</p> <p>What pick up locations will you offer?</p>	<p>Write in location and use checkmark to indicate if a card reader is available for SNAP/EBT payments and if a person is available to collect weekly / installment payments:</p> <p>Location 1:</p> <hr/> <ul style="list-style-type: none"> <input type="checkbox"/> Has EBT Card Reader? <input type="checkbox"/> Has a person to collect payment? <p>Location 2:</p> <hr/> <ul style="list-style-type: none"> <input type="checkbox"/> Has EBT Card Reader? <input type="checkbox"/> Has a person to collect payment? <p>Location 3:</p> <hr/> <ul style="list-style-type: none"> <input type="checkbox"/> Has EBT Card Reader? <input type="checkbox"/> Has a person to collect payment?
<p>Other</p> <p>What additional flexibility will you offer?</p>	<p>Check as many as apply:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Offer 'free choice' CO-CSA shares* <input type="checkbox"/> Allow customers to trade vegetables they don't want with other members at pick-up <input type="checkbox"/> Offer shares on a bi-weekly or monthly basis <input type="checkbox"/> Referral to Nutrition Education Programs to help CO-CSA participants learn how to prepare, store, cook and enjoy fresh fruit and vegetables <input type="checkbox"/> Other (write in):

*These are shares in which the member gets a choice of some or all items in their weekly share. Generally, the consumer selects items from a market-style array of produce.

5. STRATEGIES FOR OUTREACH

In this section, you'll identify strategies to market the CO-CSA to low-income customers. Review the various outreach strategies in the far-left column of Worksheet 5. For each outreach strategy, indicate whether you will try it in 2018, later, or not at all.

For those strategies you wish to implement in 2018 or sometime in the future, use the last column to describe steps you will take.

Partners are important sources of support in outreach efforts; make sure to consult your coaching team about the list of local organizations that address food security issues in your area.

It is ok to focus only on securing funding for the existing CO-CSA members in 2018, and wait until a future time to focus on attracting new customers.

Coaching tip: To help farmers plan this piece, familiarize yourself with the materials you collected for your local food security landscape (see [Appendix II](#) for an example). Note: in our study, we found that distributing flyers was a highly effective way to recruit low income families. Flyers and in-person contacts provide a good opportunity to educate potential customers about CSAs as part of outreach.

WORKSHEET 5. CO-CSA OUTREACH PLAN

Activity	I will try this	Steps I will take
Adapt photos and messages from your flyers to post on your website (See Appendix III for an example)	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	
Host a table with samples at school and community events focused on children/families. Make sure flyers are available for attendees to take home.	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	(Which events?)
Prepare outreach materials designed for ESL audiences; offer culturally appropriate foods for ethnically diverse customers.	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	

<p>Partner with extension, EFNEP, WIC, Head Start, Economic Service Agencies, and other Community Based Organizations that support healthy food for low income families. (See Appendix II)</p> <p>You may ask partners to distribute flyers, or participate in community events designed for the populations they serve.</p>	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	<p>(Who will you partner with?)</p> <p>(What will each partner do?)</p> <p>(What events sponsored by partners can you join?)</p>
<p>Distribute flyers at Farmers' Markets and Co-ops</p>	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	<p>(Which Farmers' Markets or Co-ops?)</p> <p>(Who is the contact person?)</p>
<p>Use flyers and in-person contacts to educate potential customers about the CSA</p>	<input type="checkbox"/> In 2018 <input type="checkbox"/> Later <input type="checkbox"/> Not at all	<p>(What educational information will you include?)</p>

Note: links to funding resources and marketing materials, can be found in [Appendix III](#).

Use the space below to jot down other ideas for outreach to low income families:

2018 PLAN SUMMARY

Instructions:

Use the following Template to state your value proposition, and summarize the key decisions about 1) The amount to be cost-offset, pricing discount and number of CO shares to be offered; 2) potential funders and target amounts, 3) CO-CSA Logistics for 2018, and 4) your Outreach Partners and strategies for promoting your CO-CSA.

Coaching Tips: It may be easiest to have a paper copy of the Template with you as you fill in each worksheet, so that you can write in decisions about each topic as you go through each worksheet.

In late November farmers will participate in a group conference call to share their plans. Each farmer will have about 5 minutes to share something unique about their plans. To help us identify what would be most useful for each farmer to share, please submit a copy of the paper worksheets, the Excel worksheets and the Plan Summary to Marilyn Sitaker (msitaker@gmail.com). Make sure that the farmer has a copy of these materials and that you have a copy for yourselves.

Once you have completed CO-CSA continuation planning, please complete the post-session evaluation for each farmer (see Appendix V).

CO-CSA Continuation Plan Summary for 2018

Value Proposition			Logistics					
			SNAP Accepted?		Allow multiple SNAP payments w/in 14-day period?			
<input type="checkbox"/> Yes		<input type="checkbox"/> No		<input type="checkbox"/> Yes		<input type="checkbox"/> No		
			CO-CSA Approval Process:					
			Options for customers not accepted this season:					
			Payment types:					
			Payment frequency:					
			Pick up Locations:					
			Other Accommodations:					
Outreach								
Partners			Strategies					
Funders and Target Amounts			Notes:					
Funding Source		Target Amounts						
1.								
2.								
3.								
4.								
Total amount								

TECHNICAL ASSISTANCE

As shown in the on page 3, after the planning is complete coaches will provide technical assistance during four distinct time points: 1) a conference call for all study farms, during which farmers will share the highlights of their Continuation Plans (December 2017); 2) two check-ins during implementation of the funding and marketing components of the Continuation Plan (held between January 2018 – April 2018); and 3) a post-season debriefing session (October 2018).

In addition to TA given during these scheduled time points, farmers should feel free to contact coaching teams for advice as needed. Please note, Coaching Teams will record their observations and perceptions concerning the CO-CSA Continuation Planning Process in a structured manner, using instructions and forms found in [Appendix V](#). Data collected on these forms will be used as part of an overall evaluation of the planning and implementation process.

FARMER GROUP CALL TO SHARE CONTINUATION PLANS

In late November 2017 we will hold a 1.5-hour group conference call for farmers to share highlights of their Continuation Plans. Hearing about one farm's fundraising plans for the CO, or their outreach strategy for attracting new low-income customers, may help other farmers, and vice-versa. In addition, by scheduling a time for farmers to check in with each other, we hope to reinforce a sense of group learning and exploration. Each farmer will have about 5 minutes to share a key aspect of their Continuation Plan with the group.

Prior to the conference call, the CO-CSA Continuation team (Sitaker, Ammerman, Kolodinsky, [Seguin/Hanson] and NOFA- VT) will request your feedback on which Continuation Plan activity each farm should share. Our suggestions will be based on a review of the compiled Activities of all 12 farmers' Continuation Plans. Our goal will be to select a range and depth of activities that will be useful to other farmers.

After the Farmer Group Call, farmers will begin working on implementing their Continuation Plans prior to the beginning of the 2018 CO-CSA season.

IMPLEMENTATION CHECK-INS

Between January and March 2018, the coaching team should schedule two check-in sessions with each farmer, either in-person or by phone. The purpose of these sessions is to keep up the momentum in Continuation Plan implementation, and help problem-solve if the farmer encounters any difficulty. Make sure to have a copy of the farmers' Continuation Plan with you, so you can refer to it during the check-in.

At this meeting, coaches will ask questions (see box, right) about progress toward completing activities for the Funding and Marketing components of the Continuation Plan, using the forms in [Appendix V](#) to record notes and observations. These forms will serve as notes to be used in the evaluation of the CO-CSA Continuation Planning Process. The coaching team should send a copy of the check-in forms to Marilyn Sitaker (msitaker@gmail.com), give a copy to each farmer, and keep a copy for themselves.

Check-In Questions

1. Have you worked on any activities for this component?
(If No): Why not? (record answer)
(If yes): Please list the activities you have worked on for this component (list each activity below)
2. What specific actions have you taken for each activity? (record separately for each listed activity)
3. Record brief notes on problem-solving discussions, and decisions reached regarding modifications to activities for this component.
4. Do you have any additional observations about implementation of CO-CSA Funding plans?

POST-SEASON DEBRIEFING SESSION

At the end of the 2018 season, the coaching team should schedule a post-season debriefing session with each farmer, either by phone or in person in late September, towards the end of the CSA summer growing season. The purpose of the debriefing session is to help each farmer identify successes, challenges and lessons learned. For the debriefing session, coaches should have a copy of the farmers' Continuation Plan and the most recent check in notes, so you can refer them during the debriefing session as needed.

Coaches will use the following series of debriefing questions to help each farmer identify successes, challenges and lessons learned during the 2018 CSA season.

Coaches will record their observations, and summarize the farmer's response to each question from the debriefing session, using the post-season evaluation sheet contained in [Appendix V](#). The coaching team should send a copy of the completed debriefing forms to Marilyn Sitaker (msitaker@gmail.com), give a copy to each farmer and keep a copy for themselves.

Coaches will attend a 1.5 hour online CO-CSA Wrap-Up Conference Call in October 2018, where farmers will share their challenges, successes and lessons learned during the past CSA season.

Debriefing Questions

1. In general, what was your experience with implementing your CO-CSA Continuation Plan in 2018?
2. Specifically, tell me how implementation of your plans went this season for:
 - a. funding the CO-CSA?
 - b. CO-CSA logistics?
 - c. CO-CSA outreach?
3. With regard to implementing your plan, what were your biggest successes?
4. What factors (facilitators) contributed to the success you mentioned above?
5. What factors (barriers) got in the way of implementation?
6. What do you think were your biggest challenges with implementing your plan?
7. What information or assistance would have helped you with CO-CSA Continuation Planning during the 2018 season?
8. Do you plan to continue the CO-CSA next season (2019)?
 - a. If yes, what funding, logistical or outreach activities will you do to support your CO-CSA?
9. Are there any other comments you'd like to share about your experience with CO-CSA Continuation Planning?

APPENDIX I SUMMARY OF FARM FRESH FOODS FOR HEALTHY KIDS

Project summary:

This project, *Innovative Community Supported Agriculture Cost-Offset Intervention to Prevent Childhood Obesity and Strengthen Local Agricultural Economies*, examines whether subsidizing the cost of community supported agriculture (CSA) shares (herein referred to as cost-offset CSA, or CO-CSA), for low-income families combined with CSA-tailored nutrition education: 1) increases consumption of fruits and vegetables, 2) substitutes fruits and vegetables for more energy-dense foods, and 3) improves overall diet quality and energy balance, thus helping children maintain healthy body weights.

The study is a randomized intervention trial, meaning that families will be randomly assigned to either the intervention group or the control group (which will receive an identical intervention one year later). The grant funds will provide 50% of the price of the CSA share for CO-CSA participants, with the remaining cost paid by the participant through SNAP/EBT benefits and/or cash. The tailored nutrition education curriculum will be delivered by extension educators on consecutive weeks in three-lesson clusters during early, mid-, and late CSA season, for a total of nine classes. This is a multistate project with CSA farmer representation from NY, NC, VT, and WA.

Farms: Farms must have a current CSA program, but *without a formal structure in place to offer CO-CSA shares to low-income members*. To participate, farmers must: 1) accept, or be willing to accept, SNAP benefits/EBT (support will be offered by the research team); 2) be willing to negotiate payment plans for low-income members; 3) agree to participate in the creation and implementation of a sustainability plan to keep the CO-CSA program in place at the conclusion of the intervention period; 4) be willing to monitor and report the number of shares, and share content, distributed to project participants; and 5) be willing to provide information on the farms' major good and service expenditures and where these sales took place in order to help us calculate the economic impact of increased participation in CSA programs. Farmers should also be willing to consider: 1) creating new pick-up site(s) if appropriate/possible; and 2) hosting classes and/or 'field trips visits' to your farm for adults and children participating in this project. Finally, to be eligible, there also must be an extension-affiliated educator available in the county where the farm is located who is able and willing to provide the educational sessions.

Participants (low-income families): To be eligible, research intervention participants must: 1) be 18 years of age or older; 2) be English-speaking; 1) meet income requirements of <185% of federal poverty level; 2) have at least one child in the household between 2 and 12 years old); 3) have not participated in a CSA in the past five years; 4) purchase the 50% CO-CSA share with their SNAP/EBT benefits or their own money; and 5) attend nine CSA-tailored extension education classes as part of the intervention. Extension educators will help recruit participants from local health departments and/or social service

departments (or similar agencies); SNAP-Ed, EFNEP, and other USDA education programs; and other community sites serving low-income residents.

Extension: Activities of the Extension educator will include (but are not limited to): 1) assist with research participant recruitment, 2) assist with participant data collection and participant follow-up, 3) attend training(s), 4) teach the CSA-tailored curriculum, 5) report on activities, 6) maintain research records, and 7) related tasks as assigned. We anticipate most of effort to occur during the CSA-season (May-October) in years 2 (2016) and 3 (2017) to provide the CSA-tailored curriculum.

The curriculum to be delivered. The research team, in consultation with an extension advisor from each state, will evaluate and integrate existing curricula and other relevant resources to create a CSA-tailored nutrition education curriculum that considers regional and seasonal considerations and that complements (rather than duplicates) existing curricula being used for EFNEP, SNAP-Ed, and other programs. The nine lessons will be delivered by extension educators to project participants on consecutive weeks in three-lesson clusters during early, mid-, and late CSA season. The CSA-tailored education will aim to: 1) address knowledge and beliefs about the value and importance of consuming fruits and vegetables; 2) improve skills and self-efficacy with respect to storing, preparing, and consuming CSA produce; 3) integrate strategies to substitute fruits and vegetables for more energy-dense foods (e.g. processed snack food); 4) provide opportunities for participants to observe peers demonstrating newly acquired skills; 5) provide supportive out-of-class materials and opportunities for both parents and children, such as written and online resources, that focus on other key obesity prevention behaviors (e.g. reducing sedentary time and decreasing consumption of sugar sweetened beverages) as well as potential farm “field trip” visits when possible. Although the class content will focus primarily on parents, children will also be welcome at classes, with prepared partnered materials for each lesson that can be taken home if not used in class.

Intervention: We will recruit 60 participant households per state, divided into two groups (30 Phase I, Intervention; 30 Phase II, Control Group Delayed Intervention). Each state will implement the intervention trial in 2-3 communities.

If intervention implementation involves **two communities...**

- In EACH community, the extension educator will need to recruit 30 participants in year 2(2016), and provide education to 15 participants in year 2 (2016), and another 15 participants in year 3 (2017).
- Each farm will need to provide 15 CO-CSA shares year 2 (2016), 30 CO-CSA shares year 3 (2017), 15 CO-CSA shares year 4 (2018).

If intervention implementation involved **three communities...**

- In EACH community, the extension educator will need to recruit 20 participants in year 2(2016), and provide education to 10 participants in year 2 (2016), and another 10 participants in year 3 (2017).
- Each farm will need to provide 10 CO-CSA shares year 2 (2016), 20 CO-CSA shares year 3 (2017), 10 CO-CSA shares year 4 (2018).

Table 2.			
	Year 2 (2016)	Year 3 (2017)	Year 4 (2018)
Phase I: Intervention Families	50% CO-CSA + CSA-tailored education	50% CO-CSA only	CO-CSA at sustainability level
Phase II: Control Families	Data collection only	50% CO-CSA + CSA-tailored education	50% CO-CSA only

If you have any questions about this project or if you would like further explanation on any of the components of this project, please do not hesitate to contact the research team.

APPENDIX II FOOD SECURITY LANDSCAPE

Food Security Landscape: Thurston and Skagit County

Thurston County

General

WIC Office

WIC Checks for fruits and vegetables

EBT/SNAP locations

Farmers' Markets

Olympia Farmers Market

WIC and Senior Checks

CSAs

Farms with installment payment plans

Farms who accept EBT/SNAP for CSA Shares

Wholesale Retailers

Retailers who sell local farmers' produce items and accept EBT/SNAP

Emergency Food Assistance

Thurston County Food Bank

Thurstoncountyfoodbank.org

[Cost-Offset Continuation Planning for Farmers](#)

(there are also numerous satellite locations and mobile food banks, as well as gleaners program, FORKids project, summer lunch program, and nutrition classes

Main Location

Mon, Wed, Fri 11:00AM-3:00PM
2nd and 4th Wed 5:00-7:00pm
220 Thurston Ave NE 98501
(360) 352-8597

Skagit County

General

WIC

WIC Checks for fruits and vegetables

Community Action Network (CAN)

EBT/SNAP locations

Farmers' Markets

CSAs

Farms with installment payment plans

Farms who accept EBT/SNAP for CSA Shares

Wholesale Retailers

Retailers who sell local farmers' produce items and accept EBT/SNAP

Intermediate Food Assistance

Skagit Gleaners

1021 Riverside Drive
Mount Vernon, WA 98273
360-848-1045
info@skagitgleaners.org

\$365 yearly membership plus 3 volunteer hours/month and can shop gleaned produce during shopping hours

[**Cost-Offset Continuation Planning for Farmers**](#)

(Includes food market, clothing (each member allowed 4 items/month plus 1 pair of shoes), budget mentoring classes, dress for success, work boots, haircuts, barter boards, education classes, experience based learning opportunities, job readiness)

Shopping hour

Monday, Wednesday, and Friday 9:30-11:00am
Tuesday and Thursday 5:00-6:15pm
Saturday and Sunday 9:30-10:30am

Emergency Food Assistance

Food Banks

Sedro-wooly

Helping Hands Food Bank

Helpinghandsfoodbank.org

360-856-2211

Wednesdays 10am-4pm

(Includes Food-4-Kids program, mobile food banks, grocery rescue)

Anacortes

Anacortes 100 Food Bank

512 4th Street, Anacortes

360-293-6445

Tuesday and Friday 10am-2pm

Salvation Army Food Bank

3001 R Drive, #100, Anacortes

360-293-6682

Monday and Wednesdays 1-3:45pm

St. Vincent DePaul Food Bank

4001 St. Mary's Drive, Anacortes

360-293-9821

[Cost-Offset Continuation Planning for Farmers](#)

Fridays 10am-11am

Burlington

Tri-Parish Food Bank

935 Peterson Road, Burlington

September thru May: Saturday 1pm-3pm

June-September: Wednesdays 2-6pm

Clear Lake

Community Covenants Food Bank

360-419-7061

Mondays, call Love INC for appointments

360-419-7061

Concrete

Concrete Food Bank

45942 Main Street, Concrete

360-853-8505

First Tuesdays of the month from 12-3pm

Hamilton

Hamilton Community Food Bank

571 Petit St., Hamilton

360-826-4090

Tuesdays 11-12 and 1-3pm

La Conner

Cost-Offset Continuation Planning for Farmers

La Conner Sunrise Food Bank

601 South 2nd, La Conner

360-466-3277

Mondays 2-3pm

Lyman

Shepard's Heart Care Center

8334 S Main Street, Lyman

360-422-3765

Thursdays 10:30am-1pm

Marblemount

Bread of Life Food Bank

59850 Hwy 20, Marblemount

360-873-2504

1st and 3rd Wednesdays, 11am-5pm

Mt. Vernon

Neighbors in Need

1615 South 2nd Street, Mt. Vernon

360-420-0558

Tuesdays 1pm-6pm

APPENDIX III RESOURCES FOR MARKETING AND FUNDING

GRANT WRITING TIPS

Outline for writing a grant application for funding. In this Toolkit, you will find supports for writing a grant application for funding. Part I gives a step-by-step overview of the grantwriting process. Part II provides a general template for writing a grant application. Completing Part II will give you a solid proposal that can be adapted to meet specific grant opportunities and review criteria for specific funders. Additional tools can be found at the end of the section.

<http://ctb.ku.edu/en/writing-grant-application>

TIPS FOR OPERATING A CO-CSA

Running a Low-Income CSA: A Brief Overview of the World PEAS 2012 Experience. World PEAS is a food hub that links small scale growers with customers—with a specific focus on low-income families. Partnerships with local social services agencies that address food security. Includes a description of fund-raising activities, outreach strategies and how **marketing** materials were developed.

https://nesfp.org/sites/default/files/resources/low_income_csa_overview.pdf

Successful CSAs in Low-Income Communities: Binghamton Farm Share Helps CSA Farmers Develop Sustainable Business in Untapped Low-Income Markets

<http://smallfarms.cornell.edu/2017/04/03/successful-csas/>

Urban farm benefits low income consumers: Greensgrow

https://www.cdfifund.gov/Documents/Web%206_Case%20Study-GREENSGROW.pdf

Blog post by Katie Spring, November 2013: Making your CSA farm accessible to low income customers. This post by a small-scale farmer shares their tips for increasing access to fresh local food for low-income customers, including partnering with NOFA-VT, arranging convenient pick-up locations, accepting SNAP/EBT and offering work-shares and a sliding fee scale.

<https://www.highmowingseeds.com/blog/making-your-farm-accessible-to-low-income-customers/>

Profile of Uprising farm in WA: Washington farmers describe their use of SNAP-EBT to improve access to healthy foods for local low-income residents, and discuss the success of using flyers and word of mouth to attract new customers.

<https://www.localharvest.org/newsletter/20080130/csa-for-the-poor.html>

ADDITIONAL RESOURCES FOR SMALL-SCALE PRODUCERS

Adam, K. et al. (1999). Direct Marketing. ATTRA Sustainable Agriculture. Updated (2016) by Thea Rittenhouse. Discusses benefits and risks associated with selling agricultural products directly to customers (DTC). Includes farmers markets, Community Supported Agriculture (CSA), and direct sales to restaurants, institutions, and food hubs, as well as agritourism and Internet-based direct marketing. Additionally, the publication contains information on **marketing plans**, pricing strategies, and creative **marketing techniques**. Examples illustrate how farmers are utilizing direct marketing channels to become more economically viable. <https://attra.ncat.org/attra-pub/summaries/summary.php?pub=263>

PolicyLink's Toolkit for Farmers' Markets:

<http://www.policylink.org/sites/default/files/farmers-market.pdf>

Tips from the Good Food Box Program in Seattle:

http://www.agingkingcounty.org/wp-content/uploads/sites/185/2016/09/GFB_Toolkit.pdf

Pennsylvania State Extension: Tips for Recruiting and Retaining CSA members:

<https://extension.psu.edu/community-supported-agriculture-part-ii-members-and-their-role?>

FARM BUSINESS PLANNING TOOLS

- Brookfield Farm CSA Spreadsheets, <http://www.brookfieldfarm.org/cropplanning/>
- Small Farm Central-Member Assembler CSA Software, <http://www.smallfarmcentral.com/member-assembler>
- Ag Squared, <http://www.agsquared.com/>
- Farmigo, www.farmigo.com
- FarmOS, <http://farmos.org>
- CSAware, www.csaware.com

GALLERY OF MARKETING MATERIALS

Advertising subsidized CSA for low income families, from Good Heart Farmstead in Vermont.

<https://goodheartfarmstead.com/our-csa/> Used with permission.

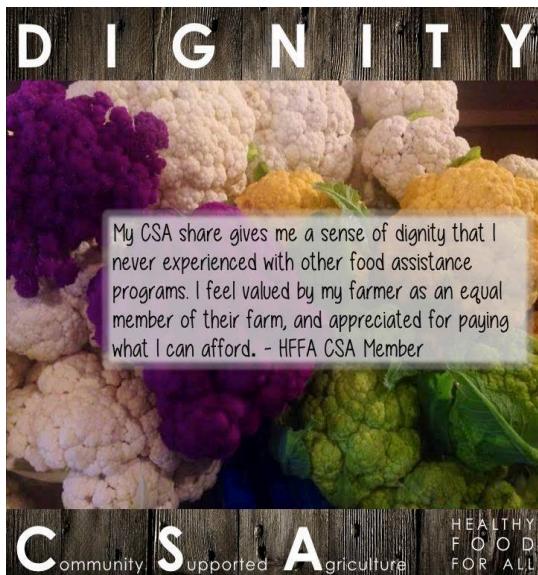


Our tagline, "local food for everyone", says it all. Our mission is to make local food accessible to everyone, no matter what your income is. We hold two annual fundraisers and partner with the NOFA-Vermont Farm Share Program in order to subsidize CSA shares for our neighbors who otherwise would not be able to afford them. We donate produce to the Worcester Food Shelf weekly through the summer growing season, and encourage those who are able to purchase a "donation" share for the Food Shelf or similar organization that distributes food to those in need. In this way, we all act together to increase local food access.

Social Marketing to encourage Facebook donations, from Healthy Food for All, Cornell University.

<http://www.healthyfoodforall.org> Used with permission.





APPENDIX IV CO-CSA PAYMENT SCHEDULES

CO-CSA Payment Schedules

This document is meant to provide insight for different payment options available to CSA farmers in how they wish to accept payment for the cost of shares from CO-CSA members. Shaded boxes signify blocks of time covered by a single payment transaction between farmer and low-income consumer (CO-CSA member).

Payment plans that meet the 14-day payment limitations of SNAP are indicated with an asterisk (*). Tables are arranged by payment type. Columns represent date of pick-up by month, payment responsibility of customer (CO-CSA member) and costs to be paid out of funds raised for the cost-offset (C.O.).

Share Information (For this example)

- Pick-up occurs on Monday
- June-October 2018 (22 pick-ups) Assumes 50% Cost-offset (C.O.)
- Total share cost is \$550
- Cost of weekly share is \$25

PAYMENT PLANS 2017. (Will be updated to 2018 dates)

One Monthly Payment

JUNE			JULY			AUGUST			SEPTEMBER			OCTOBER		
Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.
5 th	\$50	\$0	3 rd	\$62.50	\$0	7 th	\$50	\$0	4 th	\$50	\$0	2 nd	\$62.50	\$0
12 th	\$0	\$0	10 th	\$0	\$0	14 th	\$0	\$0	11 th	\$0	\$0	9 th	\$0	\$0
19 th	\$0	\$50	17 th	\$0	\$62.50	21 st	\$0	\$50	18 th	\$0	\$50	16 th	\$0	\$62.50
26 th	\$0	\$0	24 th	\$0	\$0	28 th	\$0	\$0	25 th	\$0	\$0	23 rd	\$0	\$0
			31 st	\$0	\$0							30 th	\$0	\$0
	\$50	\$50		\$62.50	\$62.50		\$50	\$50		\$50	\$50		\$62.50	\$62.50

5 Payments; Payments occur at the beginning of each month; Not eligible for SNAP payments.

*Two Monthly Payments

JUNE			JULY			AUGUST			SEPTEMBER			OCTOBER		
Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.
5 th	\$25	\$0	3 rd	\$31.25	\$0	7 th	\$25	\$0	4 th	\$25	\$0	2 nd	\$31.25	\$0
12 th	\$0	\$25	10 th	\$0	\$31.25	14 th	\$0	\$25	11 th	\$0	\$25	9 th	\$0	\$31.25
19 th	\$25	\$0	17 th	\$31.25	\$0	21 st	\$25	\$0	18 th	\$25	\$0	16 th	\$31.25	\$0
26 th	\$0	\$25	24 th	\$0	\$31.25	28 th	\$0	\$25	25 th	\$0	\$25	23 rd	\$0	\$31.25

			31 st	\$0	\$0								30 th	\$0	\$0
	\$50	\$50		\$62.50	\$62.50		\$50	\$50		\$50	\$50		\$62.50	\$62.50	

10 Payments; Payments occur at the first pick-up of the month and first pick-up after the 15th; Friendly for SNAP customers with benefits partially deposited on the 1st and 15th of the month.

***Weekly Payments**

JUNE			JULY			AUGUST			SEPTEMBER			OCTOBER			
Date	Cust.	C.O.	Date	Cust.	C.O.										
5 th	\$12.50	\$12.50	3 rd	\$12.50	\$12.50	7 th	\$12.50	\$12.50	4 th	\$12.50	\$12.50	2 nd	\$12.50	\$12.50	
12 th	\$12.50	\$12.50	10 th	\$12.50	\$12.50	14 th	\$12.50	\$12.50	11 th	\$12.50	\$12.50	9 th	\$12.50	\$12.50	
19 th	\$12.50	\$12.50	17 th	\$12.50	\$12.50	21 st	\$12.50	\$12.50	18 th	\$12.50	\$12.50	16 th	\$12.50	\$12.50	
26 th	\$12.50	\$12.50	24 th	\$12.50	\$12.50	28 th	\$12.50	\$12.50	25 th	\$12.50	\$12.50	23 rd	\$12.50	\$12.50	
			31 st	\$12.50	\$12.50								30 th	\$12.50	\$12.50
	\$50	\$50		\$62.50	\$62.50		\$50	\$50		\$50	\$50		\$62.50	\$62.50	

22 Payments; Payments occur each week at pick-up; Friendly for SNAP customers.

TRADITIONAL PAYMENT

No Cost-Offset

JUNE			JULY			AUGUST			SEPTEMBER			OCTOBER			
Date	Cust.		Date	Cust.											
5 th	\$550		3 rd	\$0		7 th	\$0		4 th	\$0		2 nd	\$0		
12 th	\$0		10 th	\$0		14 th	\$0		11 th	\$0		9 th	\$0		
19 th	\$0		17 th	\$0		21 st	\$0		18 th	\$0		16 th	\$0		
26 th	\$0		24 th	\$0		28 th	\$0		25 th	\$0		23 rd	\$0		
			31 st	\$0									30 th	\$0	
	\$550			\$0			\$0			\$0			\$0		

1 Payment; Occurs on or before the first pick-up; Not eligible for SNAP payments.

50% Cost-Offset (C.O.)

JUNE			JULY			AUGUST			SEPTEMBER			OCTOBER		
Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.	Date	Cust.	C.O.
5 th	\$275	\$275	3 rd	\$0	\$0	7 th	\$0	\$0	4 th	\$0	\$0	2 nd	\$0	\$0
12 th	\$0	\$0	10 th	\$0	\$0	14 th	\$0	\$0	11 th	\$0	\$0	9 th	\$0	\$0
19 th	\$0	\$0	17 th	\$0	\$0	21 st	\$0	\$0	18 th	\$0	\$0	16 th	\$0	\$0
26 th	\$0	\$0	24 th	\$0	\$0	28 th	\$0	\$0	25 th	\$0	\$0	23 rd	\$0	\$0
			31 st	\$0	\$0							30 th	\$0	\$0
	\$275	\$275		\$0	\$0									

1 Payment; Occurs on or before the first pick-up; Not eligible for SNAP payments

APPENDIX V EVALUATION MATERIALS

The Research member of the coaching team will be responsible for collecting evaluation data at four time points between October 2017 and October 2018: 1) Post-Planning Observations; 2) Notes from two check-in conversations with each farmer; and 3) Audio files and notes from a post-season debriefing session with each farmer.

I. POST-PLANNING SESSION OBSERVATIONS:

Instructions: After you have held the planning session (sometime between October and late November 2017), use the form below to record your observations. Print and complete one form per farmer. The coaching team should send a copy of all Post Planning session observation forms to Marilyn Sitaker (msitaker@gmail.com), and keep a copy for themselves.

Farm ID#: _____ Name of Researcher: _____ Date: _____

1. What are your overall impressions of your planning session with this farmer?

2. Please record the duration of the planning session: _____ hours and _____ minutes

3. What aspect of planning seemed to resonate most with the farmer?

4. What aspects of planning seemed to resonate least with the farmer?

5. Were there specific worksheets they seemed to be particularly interested in? If yes, what were they?

6. Were there any worksheets that the farmer seemed to have difficulty with? If yes, what were they?

7. Were there any planning aspects the farmer requested, that were not covered in the CO-CSA planning process?

8. Do you have any other impressions you would like to share?

II. FARMER CHECK-IN SHEET

Instructions: Coaches should schedule two check-ins per farm, either in person or by phone, to take place between January and March 2018. Make sure to have a copy of the farmer's plan with you, so you can refer to it during the check-in. At this meeting, ask the following question about progress toward completing activities under the CO-CSA Funding and Marketing components of the Plan, using the forms below to record your notes and observations. The coaching team should send a copy of both check-in forms for each farmer to Marilyn Sitaker (msitaker@gmail.com), and keep a copy for themselves.

Farm ID#: _____ Name of Researcher: _____ Date: _____

CO-CSA FUNDING COMPONENT

1. Have you worked on any activities for this component? [Use farmer's plan to probe each activity.]

a. (If No), Why not? (record answer)

b. (If yes): Please list the activities have you worked on for this component (record name of each activity):

- i. _____
- ii. _____
- iii. _____
- iv. _____
- v. _____

2. What specific actions have you taken for:

a. [Activity i]

b. [Activity ii]

- c. [Activity iii]
- d. [Activity iv]
- e. [Activity v]

3. Record brief notes on problem-solving discussions, and decisions reached regarding modifications to activities for this component:

4. Any additional observations about implementation of CO-CSA Funding plans?

CO-CSA MARKETING COMPONENT

5. Have you worked on any activities for this component? [Use farmer's plan to probe each activity]

a. (If No), Why not? (record answer)

b. (If yes): Please list the activities have you worked on for this component? (record name of each activity):

- i. _____
- ii. _____
- iii. _____

6. What specific actions have you taken for:

a. [Activity i]

b. [Activity ii]

c. [Activity iii]

III. POST-SEASON DEBRIEFING SESSION WITH FARMER

Instructions: Coaches should schedule a final debriefing session with each farmer, either in person or by phone, to take place in October 2018. Make sure to have a copy of the farmer's plan with you, so you can refer to it during the check-in. At this meeting, ask the following questions about the CO-CSA Funding and Marketing components of the Plan, using the forms below to record your notes and observations. The session will be audio recorded, and the research member of the coaching team will take notes. The researcher should upload audio file to a secure location on Cornell Box, and send a copy of the Final Debriefing notes for each farmer to Marilyn Sitaker (msitaker@gmail.com).

Farm ID#: **Name of Researcher:** **Date:**

1. In general, what was your experience with implementing your CO-CSA Continuation Plan in 2018?

2. Specifically, tell me how implementation of your plans went this season for:
 - a. funding the CO-CSA?

 - b. CO-CSA logistics (if applicable)?

- c. CO-CSA outreach (if applicable)?

3. Regarding implementing your plan, what were your biggest successes?

- a. What factors (facilitators) contributed to the success you mentioned above?
- b. What factors (barriers) got in the way of implementation?

4. What do you think were your biggest challenges with implementing your plan?

5. What information or assistance would have helped you with CO-CSA Continuation Planning during the 2018 season?

a. Do you plan to continue the CO-CSA next season (2019)?

b. If yes, what funding, logistical or outreach activities will you do to support your CO-CSA?

6. Are there any other comments you'd like to share about your experience with CO-CSA Continuation Planning?

COACHING ACTIVITIES AND MATERIALS TO COMPLETE AND SUBMIT

Continuation Planning Workshop (to take place **online** in **October 2017**)

Planning Meeting (to take place **in-person** sometime **before November 2017**)

Complete and return:

- The 10 worksheets which cover 5 topic areas:
 - Vision and Values (1)
 - CO-CSA Funding Sources(2)
 - Setting Funding Targets (4)
 - Marketing to Low-Income Customers (2)
 - Strategies for Outreach (1)
- Excel document
- 1-page summary
- Post-planning evaluation form

Farmer Call to Share Plans (to take place **online** in **December 2017**)

Farmer Check-In 1 (to take place **in-person OR phone** in **January 2018-March 2018**)

Complete and return:

- Farmer check-in evaluation

Farmer Check-In 2 (to take place **in-person OR phone** in **January 2018-March 2018**)

Complete and return:

- Farmer check-in evaluation

Post-Season Debriefing (to take place **in-person OR phone** in **October 2018**)

Complete and return:

- Debriefing guide (AUDIO RECORD)

CO-CSA Wrap-Up Conference (to take place **online** in **December 2018**)

APPENDIX VI FINDINGS FROM THE CO-CSA RESEARCH STUDY

Relevant Findings from the CO-CSA study

1. Marketing

- a. *Who will purchase your product? What is important to these customers?*
 - Low-income consumers want consistent access to fresh produce¹
 - ALREADY make up 11% - 30% of CSA members (with no cost-offset)^{2,3,4,5}
 - CO-CSA participants and their children consume high quantities of FV, and may be 'positive deviants' with respect to fruit and vegetable consumption. 'Positive deviants' are individuals or groups whose uncommon but successful behaviors or strategies enable them to find better solutions to a problem than their peers.⁶
 - In open-ended conversations about food shopping, meals, snacks, and preferences:¹
At least half of adults said they or their family members preferred apples, bananas, broccoli, carrots, corn, grapes, green beans, onions, oranges, and tomatoes
 - At least one-third of adults said they either preferred, purchased or prepared other produce varieties such as cucumbers, lettuce, peas, peppers, potatoes and strawberries.
 - Children had similar fruit and vegetable preferences as their parents, though fewer mentioned 'cooking' vegetables (green beans, onions, peppers, potatoes, spinach, and squash)
 - More than one-third of children mentioned watermelon, although fewer of their parents did.
- b. *How can your product appeal to this audience?*¹
 - Education about CSAs is an important part of outreach efforts

¹ Appealing produce, low cost, convenience, quality and control are important to facilitating participation in community supported agriculture among low-income households (manuscript under review, 2017).

² Galt, R. E., Bradley, K., Christensen, L., Fake, C., Munden-Dixon, K., Simpson, N., ... & Kim, J. V. S. (2016) What difference does income make for Community Supported Agriculture (CSA) members in California? Comparing lower-income and higher-income households. *Agriculture and Human Values*, 1-18

³ Pole, Antoinette, and Archana Kumar. (2015) "Segmenting CSA members by motivation: anything but two peas in a pod." *British food journal* 117, no. 5 (2015): 1488-1505.

⁴ Cone, Cynthia, and Andrea Myhre. (2000) "Community-supported agriculture: A sustainable alternative to industrial agriculture?." *Human organization* 59, no. 2 (2000): 187-197.

⁵ Brehm, Joan M. and Brian W. Eisenhauer. (2008). Motivations for Participating in Community-Supported Agriculture and Their Relationship with Community Attachment and Social Capital. *Southern Rural Sociology*, 23(1), p. 94-115.

⁶ Hanson KL, Kolodinsky J, Wang W, Morgan EH, Jilcott Pitts SB, Ammerman AS, Sitaker M, Seguin RA. Adults and children in low-income households that participate in cost-offset community supported agriculture have high fruit and vegetable consumption. *Nutrients*. 2017; 9(7):726.

- Low-income consumers value local farmers and farmland
- Offering 'free choice' CSA shares may attract consumers who are unhappy with their lack of control over (unfamiliar) share contents
- Offering multiple size shares may attract consumers who are afraid of getting too much produce

c. How can I find potential low-income customers?

Our experience with recruiting participants for this study suggests that successful CO-CSA outreach:

- Draws on WORD-OF-MOUTH advertising
- Relies on partnerships with Women, Infants and Children (WIC) Program offices, Extension, and other community- based social service organizations to spread the word
- Emphasizes FACE-TO-FACE recruitment
- Promotes the CO-CSA at school and community EVENTS with activities for children (e.g. kindergarten enrollment, YMCA event, Easter festivals)
- Discourages promoting the CO-CSA at food pantries and other emergency assistance programs
- Gives families time to ask questions and decide whether joining a CO-CSA is right for them (i.e. avoids encouraging immediate decision-making)
- Uses HEADSTART, FARMERS' MARKETS and other 'local food' venues to promote the CO-CSA program
- Revisits locations that were previously successful for recruitment

2. Funding the Cost Offset

As stated in the Webinar held March 31, 2017, CO-CSAs can be operated by a single farm or via a partnership. Partnerships can be of several different types: 1) a non-profit organization that finds funding and links one or more farms to potential CO-CSA members; 2) a CO-CSA that is a project of larger non-profit organization; and 3) a CO-CSA that is a project of a collaborative partnership between healthcare organizations and businesses.

As part of our formative interviews with farmers,⁷ we asked them how they funded their existing CO-CSA. Here is a summary of our findings:

⁷ Farm Fresh Foods for Healthy Kids, Non-published data from Formative Interviews with Farmers, 2015

a. Farm write-offs, sliding scale and/or donations from full-pay members:

Seven farms used a sliding scale option, asking members with higher incomes to pay more to offset the cost of shares for low-income consumers. Most farms had success with this approach and noted that the number who contributed extra usually was balanced by the number who couldn't pay as much. One farm said their pricing structure includes a price for low income (\$495 per season), a price that covers the cost of producing the vegetables (\$695) and a price that partially offsets the cost of the low-income share (\$795).

Farmers who don't offer a sliding scale or similar approach expressed uncertainty as to how a such a program would work, or were concerned that asking full-pay members for extra money might push them away. Despite these concerns, most farmers said that they liked the concept and would be interested in learning more.

b. Grants:

Eight farms received grants that were used help offset the cost of a share for low-income consumers, and were satisfied with the results. However, some farmers felt that the additional fund-raising effort, required to make up the difference between the grant and the amount needed for the cost-offset, simply "shifted internal farm expenses around," due to the significant time and resources needed.

Farmers who didn't receive grants or participate in a grant-funded program, were interested in learning more about this mechanism. The two largest barriers mentioned were a) the time it would take to write a grant and b) the effort required to sustain this approach. Farmers also were concerned that the grant program might be discontinued: *"...when operation grants don't get renewed, and systems and, and farms have become 30 or 50 percent market dependent on a program that is tremendously subsidized. And, if it goes belly-up, they all of a sudden have to find a new market."*

c. Work-shares, bartering, and pick-your-own shares:

Four farms offered workshares. However, these were not necessarily designed as a way to as a cost-offset strategy for low-income families; in many cases all members could participate. Three farms offered work shares on a case-by-case basis and/or by request.

Barriers to offering workshares included: 1) fear needing workman's compensation; 2) the time and resources needed to train individuals who were not experienced at performing farm work; 3) members not showing up to work; 4) the limited time of often already stressed and overcommitted low-income families.

3. Logistics

- a. *How can your product appeal to this audience?*

Share size

- When asked to state their preference among several hypothetical scenarios as part of our formative research, low-income families with children preferred a mixed-variety CSA share with 8 or 9 items.⁸
- Families who participated in the CO-CSA in the summer of 2016 typically selected shares with 6 to 10 items.⁹
- Eight participating farms offered multiple share sizes; 24 participants (39%) in these farms selected the smallest size offered.⁹

Share price

- Low cost is important to low-income households in making food choices.²
- Families with children and low-incomes preferred a CSA share that cost \$15 or less per week, preferring less expensive shares that cost no more than 20% over supermarket price for the same amount of produce.⁵
- Summer 2016 CO-CSA participants typically selected shares priced \$11 to \$14 per week (cost-offset price).⁹
- In post-season focus groups, some participants mentioned that the cost-offset CSA price seemed fair, but that the full CSA price seemed too high for the amount of produce provided.¹⁰

Pick-up sites

- In formative interviews, low-income consumers expressed concern that a CSA pick-up location might not be convenient¹
- These same low-income families said they would hypothetically travel as much as 15 minutes to pick-up a full CSA share with standard variety.⁵
- Summer 2016 CO-CSA participants picked-up their shares at the farm (26%), or at a farmers' market (29%). Fewer picked-up their shares at a place of worship (22%) or a

⁸ McGuirt JT, Jilcott Pitts SB, Hanson K, DeMarco M, Seguin RA, Kolodinsky J, Becot F, Ammerman AS. A choice experiment to examine factors influencing willingness to participate in a Community Supported Agriculture (CSA) program among low-income parents. In review.

⁹ Garner JA, Jilcott Pitts SB, Hanson KL, Ammerman AS, Kolodinsky J, Sitaker MH, Connor LM, Seguin RA. A mixed methods process evaluation of the Farm Fresh Foods for Healthy Kids (F3HK) Intervention. International Society of Behavioral Nutrition and Physical Activity. Vancouver, BC Canada, 2017.

¹⁰ Farm Fresh Foods for Healthy Kids, Non-published data from 2016 Focus Group

community center (10%), which was also generally where their CSA-tailored education classes were held.⁹

- The majority of Summer 2016 CO-CSA participants picked-up at least three-quarters of their CSA shares (57%).⁹

b. *How will CO-CSA members pay their balance?*

Flexible payment plans/deferred payment:

All farmers interviewed as part of formative research (research conducted prior to starting the intervention) said they accepted installment payments.⁷ Sixteen farmers had formal installment plans, which offered anywhere from two payments per season to weekly payments. Those without a formal installment plan accepted payment in installments upon request.

The main reasons for not having or advertising a formal payment plan was due to the farmers' preference for up-front payment prior to the season begins or a desire to avoid tracking multiple payments. One farmer collected post-dated checks as a strategy for simplifying what can be a time-consuming process: "...*they can give us post-dated checks, and then we don't have to track them down every month and remind them to pay a check.*"⁷

SNAP/EBT:

Six farms accepted SNAP for CSA payment.⁷ Three farms used an electronic system, 2 used paper vouchers, and 1 participated through their farmers' market. Though farms faced unique barriers along the way, all now seemed content with the process.

Among the farms that did not accept SNAP for their CSA, a few farms were authorized to accept SNAP, but had not yet implemented it. Others reported: 1) they were not sure where to begin; 2) they had started the process but felt overwhelmed with all of the options; 3) they heard about difficulties other farmers had faced; or 4) they simply did not have time.⁷

